

EVENT WITH INTENT:

BEHAVIOURS AND TRENDS
SHAPING THE FUTURE OF
THE EVENTS INDUSTRY

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INTRODUCTION

In an era of unprecedented change and development, the events industry has stood as a beacon of adaptability, resilience, and innovation.

As the world emerges from the challenges of the past few years, including a global pandemic and the rapid acceleration of the climate crisis, ExCeL London, as a leading venue within Europe, has commissioned independent research to explore the dynamic landscape of organiser, agency and delegate trends across the industry.

With the aim of providing valuable insights into the evolving preferences, behaviours and expectations of event organisers and delegates, the research also aims to provide further engagement opportunities for partners across the events eco-system.

Spending on events within the corporate sector is expected to rise by as much as 83 per cent in 2023. Whilst this is a healthy endorsement of the revived confidence around in-person events, it is also a reflection of the rising cost of running them.

This has intensified the focus on return on investment for event organisers. However, this return is not viewed in solely financial terms, as the expectations of events from organisers, businesses and delegates have evolved. With the rise of ESG reporting and considerations across all sectors, social and environmental returns and being able to prove that an event has made a positive contribution to the local environment or society is increasingly important for event organisers. Businesses and their delegates are also demanding more from events – in terms of more opportunities for networking, learning and gaining new experiences.

To produce this report, ExCeL London commissioned independent research, which included a survey of more than 250 delegates across two days at conferences in ExCeL London, and interviews with 50 key industry leaders and event professionals, to unpack some of the trends shaping the future of the UK events industry. We then tested these emerging trends with leaders of some of the world's most respected events agencies, to obtain their thoughts on how these trends might shape the way we organise and attend events in the future. We believe the breadth and depth of research we have carried out makes this one of the most detailed programmes of research conducted in our sector.

Our research explores: what drives delegate behaviour and what are the main reasons they attend events? What are the key factors behind successful networking? Are the leisure opportunities of a venue or destination important? Does the social impact and legacy of an event matter to delegates, and what does it look like? And to what degree do the views of attendees and organisers align or diverge on these issues? We also discuss the perception of London as a destination, and the importance of good connectivity. Crucially, we then look at what the emerging themes across all these key areas mean for the future.

To event with intent is key: significant global and economic shocks have shaped the industry, and as attendees are becoming more purposeful in their event attendance, organisers must understand and recognise the motivation of their attendees, and then work with agencies, venues and destinations to deliver on this.

1. [Corporate event spend to rise 83 per cent in 2023 - report | Meetings & Incentive Travel \(mitmagazine.co.uk\)](#)
2. [ESG is essential for companies to maintain their social license | McKinsey](#)

1: NETWORKING IS KING

Whilst technology such as Zoom and Teams has been able to adapt many facets of remote working life, ExCeL's research shows that one aspect it cannot replace is effective networking.

Speaking to event attendees, this emerged as the number one consideration when attending an event, and this is true across all demographics: gender, generation and whether the delegate had travelled from the UK or abroad.

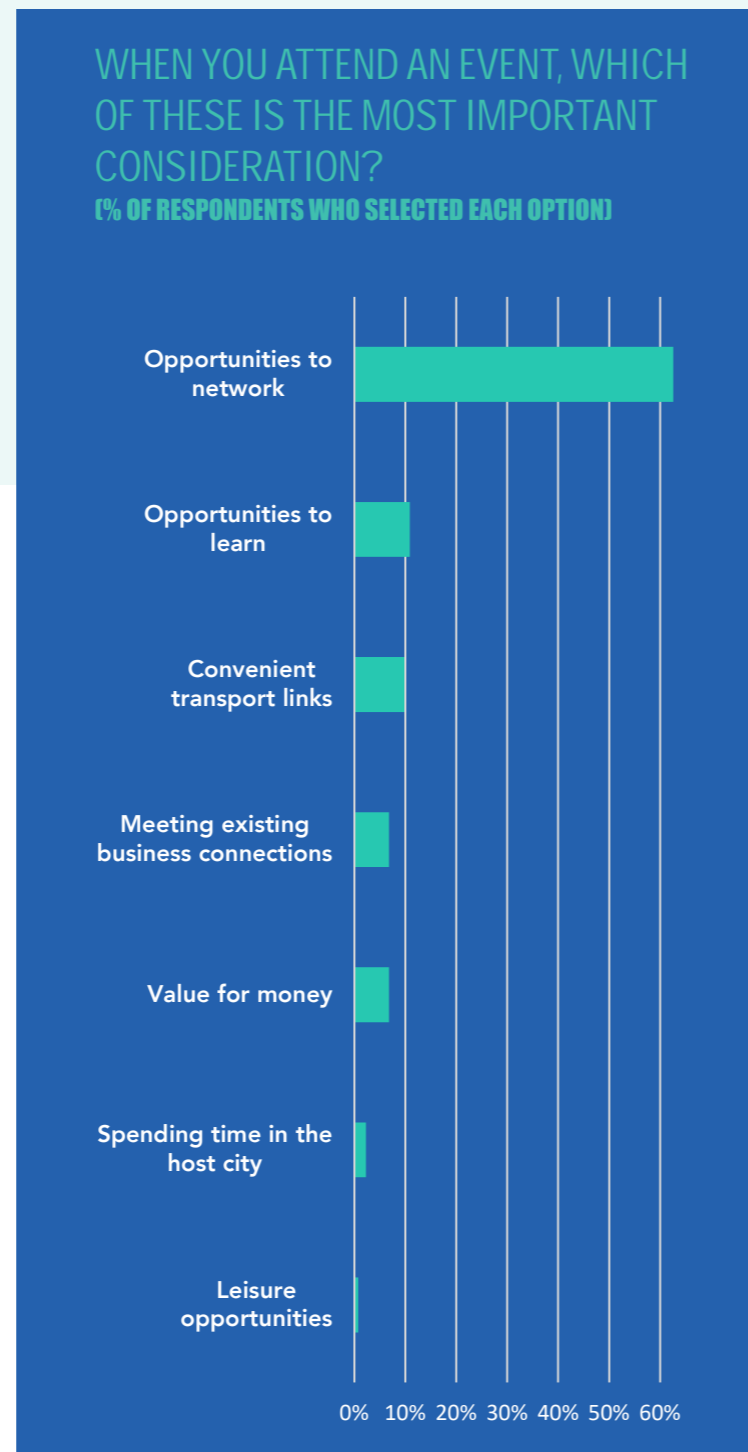
This finding is supported by The October 2022 Planning Sourcing Report which revealed that 83% of event planners expect to host more in-person events in 2023 compared to 2019³, seemingly a reaction to the lockdown restrictions imposed over the last three years.

"We do things like roundtable discussions to facilitate attendees' networking with one another. You have to strike a balance between educational content and networking."

Paul Wong – Director, Global Events – ISPOR, The Professional Society for Health Economics and Outcomes Research

"Networking and bilateral conversations are key. We curate spaces where those conversations can happen. I think it's still crucial for any type of event to have that at the forefront, because sometimes that does even more of the work than the main plenary session."

Julia Suit - Global Senior ESG Program Manager at Amazon Web Services



CURATED SERENDIPITY

However, our research suggests that while the right environment for networking can be arranged, it cannot be forced. It has to feel organic, and venue design is crucial: from the ergonomics of an event space to the number of coffee shops available, a well-designed venue increases the likelihood of what we have termed curated serendipity – a seemingly chance meeting with exactly the right person or people to help achieve organisational aims.

In the future, apps and other technology may help to create these moments, by indicating to delegates who, from their LinkedIn network or similar, is at a particular event or conference. For example, we work with LinkedIn and their InGo API which allows users to more easily create hype around the events they are attending and invite contacts and connections to join them.

LEARNING AND SHARING

Networking can take several forms; it's not just about making new connections. Conferences and events provide a platform for learning and sharing, and testing ideas that help shape future products, services and strategies. All of this contributes to the return on investment for attendees at an event.

"Something that we find to be very popular is a one on one session where a delegate actually gets to sit down with one of the panel speakers and talk to them personally for a half hour interview."

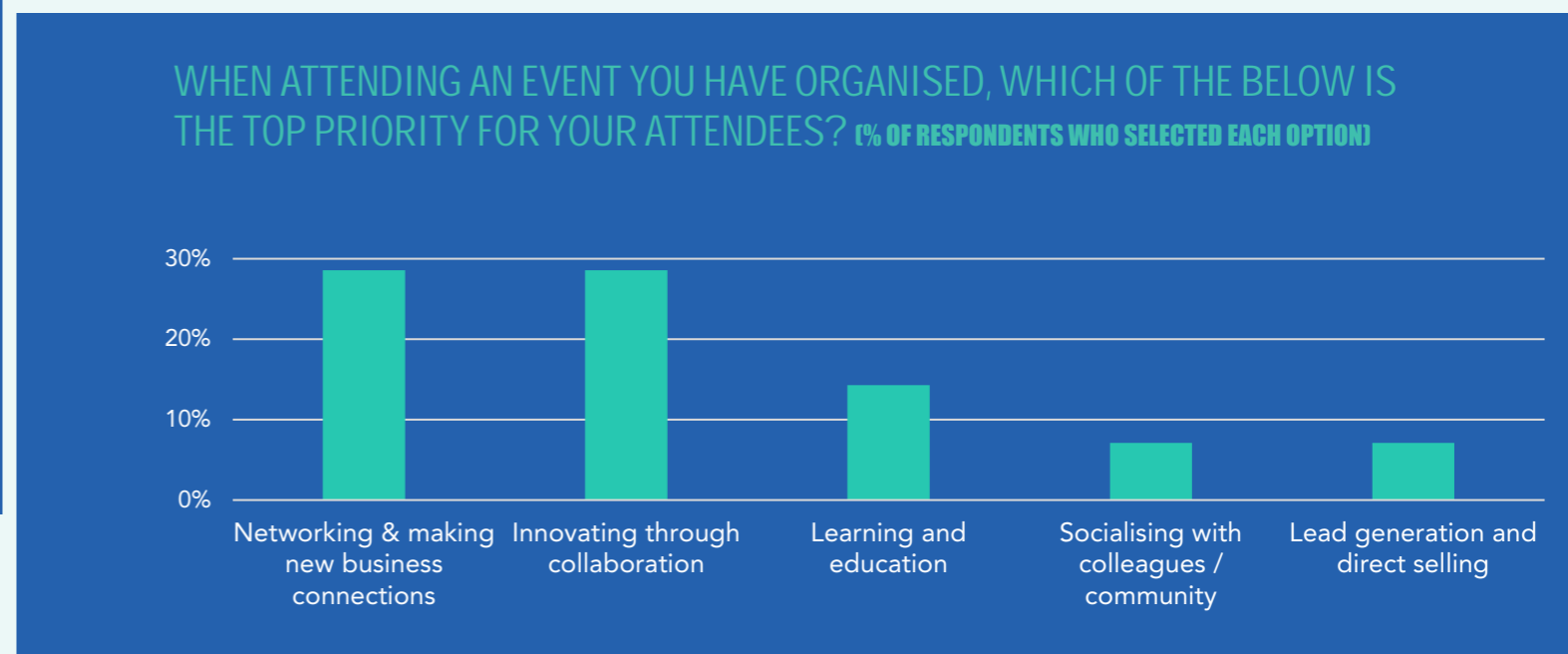
A senior representative of a technological consulting firm, who manages conferences globally

"From a networking perspective ... you no longer have to facilitate conversation starters like you did in the past - now, people just engage directly with each other. When it comes to the way folks want to absorb and engage with the events they go to, their attention spans are getting shorter."

Elizabeth Gilstrap, Vice President, Strategic Events, Salesforce

When we asked industry professionals about what drives attendance at their events they highlighted similar priorities for attendees, with innovating through collaboration, networking, and learning and education being the top three.

Having the flexibility to adapt a venue space to suit these different types of delegate interaction is crucial for organisers to drive value for clients.



3. [Latest Europe Cvent Planner Sourcing Report Reveals 83% of Planners Across the UK and Europe Expect to Host More In-Person Events in 2023 When Compared to 2019 | Cvent](#)

2: LOCATION, LOCATION, LOCATION

As event organisers know, exhibition and conference centres don't work alone - they're symbiotic with the city in which they take place.

Our research shows that London retains its reputation as a top destination to attend an event for delegates. When asked to pick three cities where they would most like to attend an event, London was selected by two thirds (66%) of respondents, with the next most popular pick, New York, selected by 53%.

London is particularly popular with Gen Z (selected by 77%) and those who had travelled from outside the UK (76%). This suggests that the pull of London as a location has not been significantly affected by the UK leaving the EU.

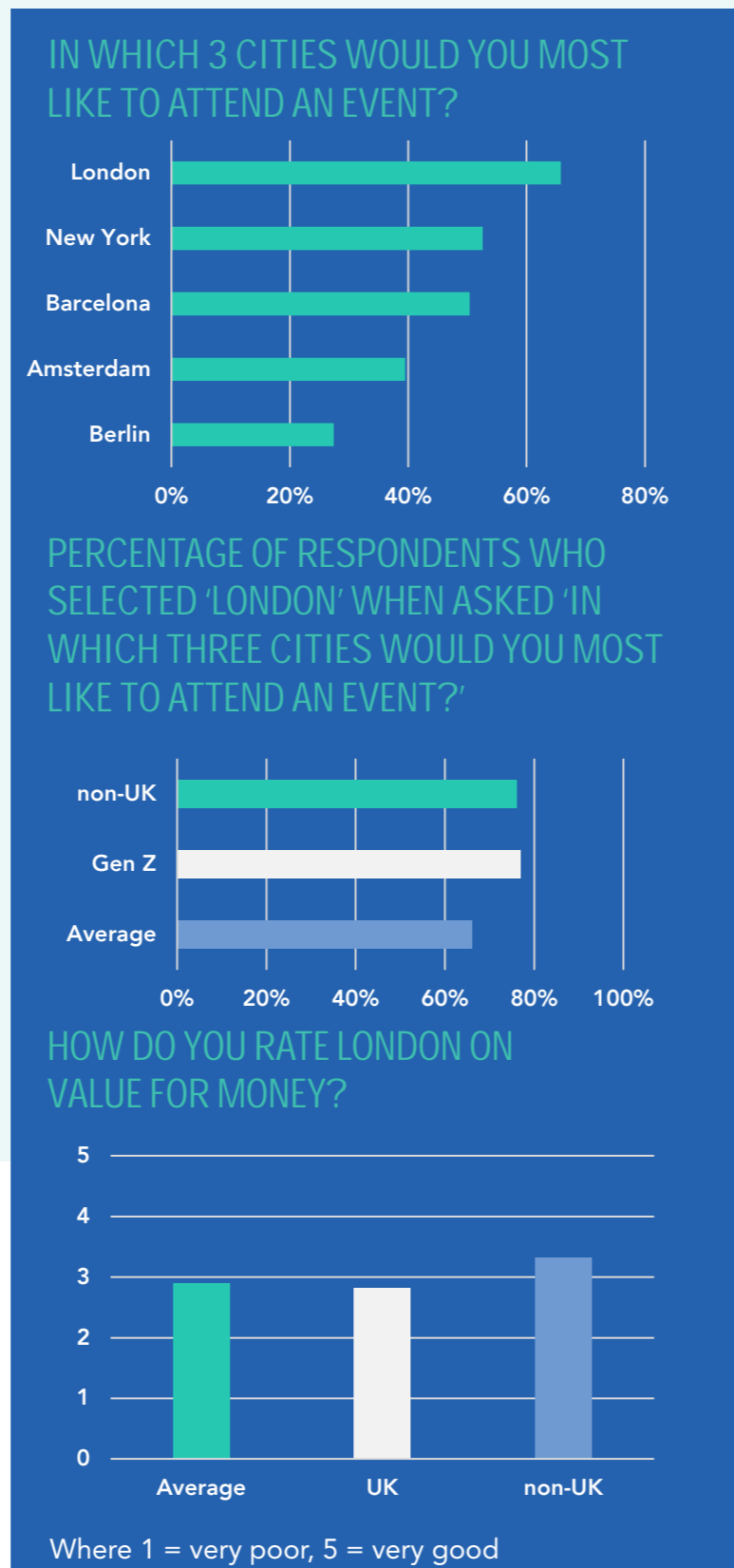
Delegates also rate the business networking opportunities in London very highly (4.3/5) which as demonstrated by our research is a key reason for attendance at an event or conference.

Respondents acknowledged the cost associated with London, scoring the city an average of 2.9/5 for 'value for money'. Interestingly, delegates who come from elsewhere in the UK view the city as more expensive than international visitors.

We found that the cost associated with London as a destination was mitigated in the minds of attendees and organisers by what the city had to offer in terms of networking opportunities, infrastructure and connectivity, and this is why it ranked number one as a destination.

"The positive side of London is that it has a very strong brand, everybody knows where it is, and it has really good airport and transport connections."

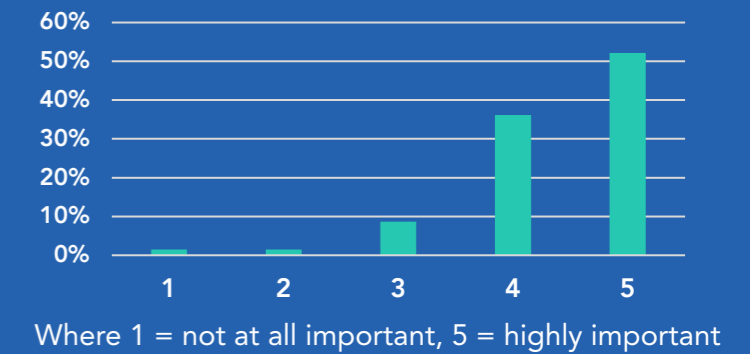
Paul Wong – Director, Global Events – ISPOR, The Professional Society for Health Economics and Outcomes Research



PLANES, TRAINS AND AUTOMOBILES

Transport links are key to the appeal of any event destination. When asked "How much do convenient travel links, such as direct flights to the city and good public transport to the venue, affect your decision to attend an event?" 88% of event attendees responded that it has a high or very high impact on their decision (average 4.4/5) with women reporting it having a higher impact (4.5/5) compared to men (4.2/5). We also found that delegates rate the transport links in London highly (Average 4.5/5).

HOW MUCH DO CONVENIENT TRAVEL LINKS, SUCH AS DIRECT FLIGHTS TO THE CITY AND GOOD PUBLIC TRANSPORT TO THE VENUE, AFFECT YOUR DECISION TO ATTEND AN EVENT?



EXCEL AND CONNECTIVITY

The introduction of the Elizabeth line connecting ExCeL London directly to Heathrow in 43 minutes and central London in just 13 minutes, has significantly improved the accessibility of the venue. The industry professionals we spoke to highlighted the benefits of the new line.

Good transport links across the city also make networking beyond the conference easier, as attendees can connect with other contacts or book business meetings outside of the event itself. This is an additional draw for organisers to promote, especially with international visitors.

"ExCeL's location used to be a downside, it was perceived as being a long way East. This meant additional travel time and often changes between the TfL routes. Now, however, with the Elizabeth line going straight in from central London, that has changed and greatly improved ExCeL's accessibility."

Marcus Beaver
UKI Country Leader at Alight Solutions

"Around a quarter of our visitors are international. Now, because of the Elizabeth Line, it takes 45 minutes to get from London ExCeL to Heathrow airport. That's a powerful driver both of the seniority of the delegates we get, and the number of days they choose to visit for – it elevates the quality of participation at conferences that take place in ExCeL London."

Jeremy Rees
Chief Executive, ExCeL



3: FOOTPRINTS AND HANDPRINTS

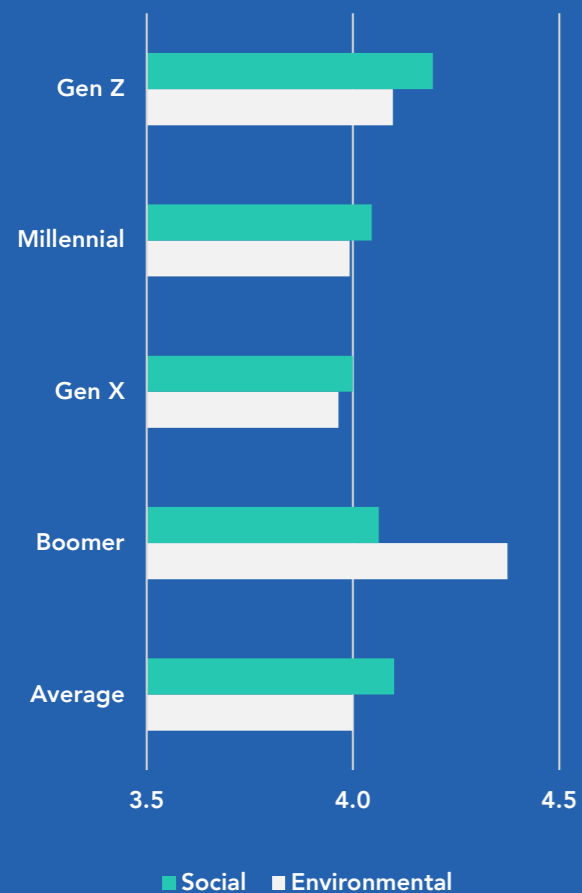
With the rise of ESG considerations and reporting across all industries, doing business with a purpose in mind is becoming a key commercial concern, not simply a moral one.⁵

Attendees view both a positive impact on the environment – reducing an event’s footprint, and a positive social impact – the handprint, as equally important. Perhaps surprisingly, the Boomer generation view impact on the environment as more important than other generations, whilst Gen Z are the most socially conscious.

In an industry report last year, sustainability was selected as a challenge by 59% of respondents, and ranked ahead of both ‘measurement of event performance’ and ‘ensuring the brand is represented consistently across events’.⁶

When we spoke to event organisers and professionals, they told us that while ESG and sustainability is a factor in deciding where to host a conference or event, unless the event itself is directly related to sustainability, they do not view it as the most important factor.

HOW IMPORTANT IS IT TO YOU THAT AN EVENT YOU ATTEND HAS IMPACT?



Where 1 = not important at all, 5 = very important

“We would hope to select venues based on ESG criteria such as sustainability if we could, but we have to balance this with the other realities of event planning such as cost, attendance and location.”

A senior representative of a technological consulting firm, who manages conferences globally

“When it comes to deciding on locations and venues for conferences, scientific guidance and innovation come first and then sustainability comes after.”

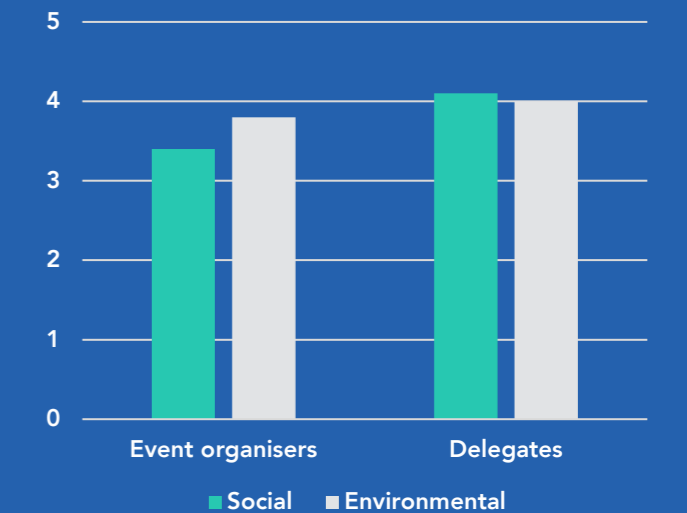
Head of Operations at a major European medical association

Supporting this finding, only 14% of senior events professionals say ESG credentials have a high or very high impact when choosing an event venue, and only 28% agree ‘Social impact is now a key part of our assessment of ROI, when evaluating the success of an event’.

This suggests there is currently a disconnect between the priorities for delegates and organisers, when it comes to the sustainability and impact of an event. This is an important difference for organisers to take note of and could look to address by collaborating with their venue.

At ExCeL, we helped the European Association for the Study of the Liver (EASL) to create a positive social impact with a local primary school during one of their conferences, which is detailed in the case study below.

IT'S IMPORTANT THAT AN EVENT VENUE CAN HELP MY ORGANISATION TO MAKE A POSITIVE IMPACT



Where 1 = not important at all, 5 = very important

HANDPRINT CASE STUDY:

The European Association for the Study of the Liver and Calverton Primary School.

“The day before our event at ExCeL, we took one of our doctors to do an assembly at a local school to talk to them about health and liver health. After playing games and creating artwork for a liver health project, the kids came to the opening ceremony where the vice Mayor of London was present. It was a great way of connecting our event to the local community.”

Ben Hainsworth, Executive Director, EASL

5. [ESG is essential for companies to maintain their social license | McKinsey](#)
 6. [Meetings & events industry trends and predictions for 2023 | Event Industry News](#)

4. BUSINESS BEFORE BLEISURE

Many in the media and events industry have cited 'bleisure' – the combining of business and leisure as the motivation for attending a specific event or travelling to a destination as 'the' key trend for the events industry over the next 12 months.⁴

Our research suggests that whilst leisure is still a key consideration it is not always a leading decision making factor and needs to be considered as part of the overall value mix.

From over 260 delegates that we surveyed, only two cited leisure as the most important consideration when choosing an event to attend. And when we spoke to organisers, they said that the leisure facilities for use by attendees is taken into account when choosing a venue, but it is not the be all and end all.

This suggests that the bleisure trend is not having as much impact on the industry as some first thought, however, it is a consideration. London is viewed as a top tier destination, with delegates scoring London's leisure opportunities as 4.4/5 on average.

This score is slightly higher amongst women (4.5) compared to men (4.3). Whilst not a leading priority for attendees, leisure opportunities should not be overlooked by organisers, as these high scores are linked to London's overall rating as a destination (4.1/5).

Leisure is not the highest priority element, but certainly it's a consideration that the destination itself be attractive to delegates.

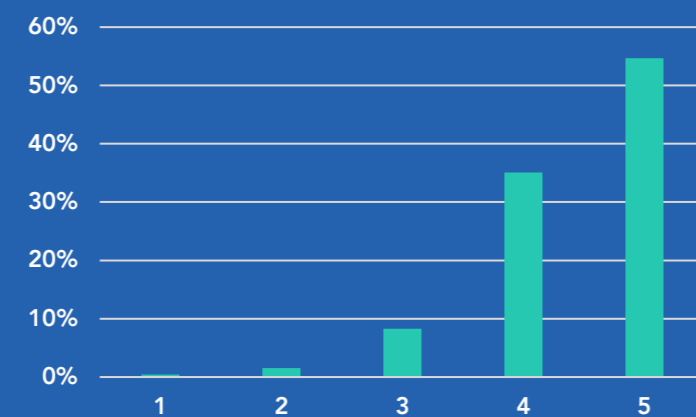
Paul Wong - Director, Global Events - ISPOR, The Professional Society for Health Economics and Outcomes Research

I think the majority of people are there to get knowledge, to get insight, and to network. After that they've extracted the value that they need and I think where people have more time, they seek out leisure opportunities.

Julia Suit - Global Senior ESG Program Manager at Amazon Web Services

HOW DO YOU RATE THE LEISURE OPPORTUNITIES IN LONDON?

(% OF RESPONDENTS WHO SELECTED EACH OPTION)



Where 1 = very poor, 5 = very good



4. [Meetings & events industry trends and predictions for 2023 | Event Industry News](#)

LOOKING FORWARD: WHAT DOES THIS MEAN FOR THE FUTURE OF EVENTS?

A shift in the event industry post-pandemic is giving rise to new priorities. Organisers must demonstrate value and maximise outcomes and experience for attendees.

Following our initial research, we wanted to test out our findings with additional leading voices in the events industry. We spoke to senior event professionals at some of the most forward-thinking and creative events agencies to find out more about the impact of these key themes now and in the future, and to create a series of recommendations to help our sector realise the opportunities available.

1. EVENT WITH INTENT

For most people networking is a key aim of event attendance, whilst learning and sharing ideas are also valuable to attendees. This shouldn't be left to chance – work with an event venue and agency to create 'curated serendipity' – spaces and user journeys which will prompt people with similar aims and ideas to come together, and ensure the environment lends itself to conversation.

This might include: seating which is comfortable but not too informal, background noise that fills the silence but which is not too distracting, refreshments, and perhaps a focal point to create conversation e.g. art or exhibits relevant to the theme of the event.

Technology is a valuable tool to create curated serendipity, whether this is part of the creative production within an event, or as a means to connect delegates before or during the event in order to provide the best possible ROI or value for their attendance. At ExCeL, we work in partnership with the team at InGo, a leading Marketing Referral platform, to

provide event organisers with the opportunity to further support effective networking within their events and to ensure attendees make the right connections to drive value through their attendance.

It is important to create a space which feels naturally conducive to conversation whilst simultaneously bringing together the right people to make the right connections. As technology and data gathering becomes smarter, the ways of doing this will become more innovative and efficient and play a key role in the overall event design. //

Russell Bennett, Partner at Taylor Bennett Partners

TECHNOLOGY AND BEHAVIOUR

Event agencies are at the cutting edge of developing and deploying new technology to deliver the very best event experiences. Some are incorporating facial recognition to gauge attendees' current mood, understand whether they enjoyed a previous seminar and whether they are open to meeting new people.

This can not only be helpful to attendees in understanding where they might find common ground with other attendees, but also to speakers wanting to know how their remarks are being received.

As agencies gather more information on participants, sometimes in partnership with behavioural scientists, they can build event experiences which are exactly what people want.

As soon as people register for an event, we try to understand the individuals in more detail, gathering insights and building personas around those participants. This in conjunction with a number of other data points and our guest experience team's survey helps us to understand the type of content they do or don't like, what resonates and the reason they're attending. All this data aids us in serving up the right content, in real time, to the right participants, ensuring its personalised and the experience engages with them. //

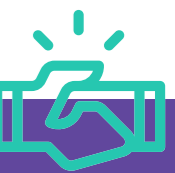
Matt Margetson, Founder and Innovation Director, Smyle

CURATED PATHWAYS

Leading event agencies are also making use of technology to guide attendees to the exhibits and seminars where they are most likely to have a chance encounter with a useful business connection. Building experiences in this way can also enable organisations to consider the diverse characteristics of attendees and ensure everyone receives the most value from attending the event.

Attendees don't want to feel as if they're being herded like cattle or being told to get on with each other. Instead, interaction should feel like it has happened purely by accident, even if - in reality - it was the result of good planning. //

Dale Parmenter, Group CEO, DRPG



LOOKING AHEAD:

- Behavioural science takes on a bigger role in event design, as more insights are gathered and utilised by event organisation teams.
- Improved understanding of attendee characteristics leads to more personalised event experiences, boosted by AI and augmented reality.

2. LONDON'S ALLURE REMAINS

London remains the top destination for hosting events, followed by New York and Barcelona.

The pull of London as a destination remains thanks to its rich cultural heritage, excellent connectivity and transport links, and the fact that, as a global business centre, it can offer networking opportunities beyond the event itself, providing access to a global business network for partnership opportunities, access to thought leaders and to global brands. There is also the added value of being able to drop into the 'London Office' or arrange meetings with clients.

London stands out as the European epicentre of the events industry. It has a melting pot of international cultures and offers considerable value for organisers delivering international events.

LONDON'S EVERGREEN APPEAL

Dena Lowery, President, Opus Agency agrees that transport, culture and diversity play a key role in London's continued appeal: "London maintains its brand as an attractive city because of the number of flights into it, the transport infrastructure within it; because English is an international language; and because it has a diversity that you don't normally see in other cities.

"There are high costs, but costs have gone up globally, and when clients are thinking about where they want to host an event, they build in the cost of where they want it to be. Speaking from a US perspective, a lot of the production costs involved in events are much lower in the UK than in North America."

Other leaders in the sector that we spoke to agree with London's evergreen appeal, and believe this unlikely to change – unlike some

destinations which experience 'moment in time' boosts around specific events, such as the Olympics.

"London is always going to be in the top five for events. Destinations which are hosting sporting events such as the Olympics might experience a boost because businesses like to have their growth mindset set against the backdrop of other types of success. But London has, and always will have, a huge array of benefits to offer."

Matt Margetson, Founder and Innovation Director, Smyle



LOOKING AHEAD:

- London remains a popular event destination for businesses, event organisers and agencies.
- To maintain and elevate that status, London is constantly adapting to the needs of event planners. Key developments have included the arrival of the Elizabeth line, which has cut travel time from Heathrow to ExCeL to 43 minutes, and new hotels being built in the city – since 2021, 73 new hotels have opened their doors in London bringing the city's bedroom inventory to over 170,000.⁵

5. [London's meetings and incentives industry soars with new openings and redevelopments | WebWire](#)

3. A NEW ROI

In an era of economic uncertainty, everyone from organisers, to suppliers, attendees, to employers, are looking for return on investment (ROI).

To go one step further, event organisers should look to measure and report a new ROI - return on intent. For example, what percentage of your attendees feel they achieved what they came for? How does that align with their business' or organisation's purpose? This could relate to new connections, new ideas, or education.

OBJECTIVE-LED ATTENDANCE

Event agencies we spoke to felt that event attendance must have a much sharper focus. Matt Margetson, Founder and Innovation Director, Smyle, highlighted that event attendance now has to be "far more objective-led". This is not just driven by attendees: businesses are being far more purposeful in the events they encourage (and pay for) employees to attend. This has been particularly driven by sustainability considerations around the environmental impact of attending an event.

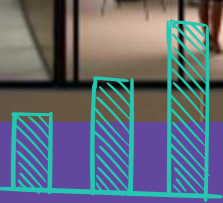
The good news for event organisers is that, post-pandemic, events have become one of the few remaining places for guaranteed face-to-face business interactions.

Jez Paxman, Strategy Director, Live Union, comments: "It used to be that a salesperson might go over to New York for a week on business, and they'd line up lots of meetings. If they did that now, they'd find everybody's working from home and expecting a Teams call. So events have become that moment, that catalyst when you can actually bring people together and you can get that valuable face-to-face time. The fundamental value of an event within business life has therefore gone up."



LOOKING AHEAD:

- Events become more focused on helping attendees achieve their specific business goals – hyper-personalisation becomes not just a nice to have, but an event essential.



4. SMALLER FOOTPRINT, LARGER HANDPRINT

Our research shows the wider impact of an event in terms of environmental and social factors is a priority for attendees, across all demographics. The events industry, as a whole, needs to play its part in helping to tackle the climate crisis and initiatives such as The Net Zero Carbon Event Pledge provide a system-wide approach for venues, organisers and suppliers across the industry to support in developing their own net zero strategies.

Organisers can also work with a venue and its local communities to create a positive handprint. This could be through meal donations to foodbanks to minimise food waste, donating leftover merchandise or items to local charities, and / or free advice or education for local communities and schools. These are relatively small gestures, and organisers who are really committed to creating a positive handprint should look at working with a venue to create a long-lasting legacy project, which causes and accelerates social change for the host community.

Organisers should also work with venues to communicate the social and environmental credentials of a chosen event destination to delegates.

LOOKING AHEAD:

- ExCeL London is developing a Legacy Framework to make more large-scale positive initiatives as easy as possible for event organisers to access. To ensure ExCeL London delivers the initiatives its community needs and wants, local stakeholders are continuously engaged to identify collaboration opportunities, which are then highlighted to organisers.

SUPPLY CHAIN SUSTAINABILITY

Leading voices at global event agencies feel that although more organisers than ever are considering the environmental and social impacts of their events, frequently requesting that carbon emissions are measured and minimised, there is still a way to go before this becomes ingrained in the way the industry thinks about event organisation.

Technology will help, through carbon measurement and carbon removal, but organisers need to make conscious decisions about all aspects of event creation to deliver truly sustainable events. Fundamentally the industry needs to consider its entire supply chain to reduce its single-use culture across all products that are used to create event experiences.

“Manufacturers and suppliers have not yet developed the full range of products to ensure the materials we use can meet both high sustainability standards, and the brand’s standard. However, I’m optimistic that this void will be filled, and we’ll be able to have an elevated event experience that can represent a brand in the right way, and still be environmentally conscious.”

Jonathan McCallum, Managing Director UK/ Nordics, George P Johnson Experience Marketing



ATTENDEE EXPECTATIONS

Attendees are, however, beginning to expect that the events they attend are sustainable which could bring about rapid change to the weight event organisers give to sustainability. Jez Paxman, Strategy Director, Live Union, comments: “One of the main drivers of events being more sustainable comes from attendee expectations. If they don’t agree with what an event is doing in terms of sustainability, then letting the organisers know can be a very powerful statement.”

To ensure events more accurately align with attendee expectations, event agency leaders felt that there should be diversity among the event management team. This will help ensure diversity of thought, and help to challenge some of the ingrained ideas about how events should run. This could include bringing new ideas to the table about production materials for events, prompting organisers to consider more sustainable options.

A key example of this is event giveaways. Organisers considering their carbon footprint should think about providing more eco-friendly giveaways, or even consider not providing them at all. Dale Parmenter, Group CEO, DRPG comments: “When considering giveaways, event organisers should look a little bit more local, and consider alternatives such as giving to charitable causes. There’s always lots of waste at the end of an event and we should be looking more at how we can reduce that.”

LOOKING AHEAD:

- Sustainability is only going to grow in importance for businesses, event organisers and attendees.
- Attendees will increasingly demand that events ‘do better’, so organisations should look at how they can have an increased, positive social handprint, as well as a reduced carbon footprint.



5. DON'T OVERPLAY THE 'BUSINESS OVER BLEISURE' CARD

The mixing of business and leisure or 'bleisure' to make the most of the cost of travelling to an event was not prioritised as highly as some other factors.

BAKED IN BLEISURE

Event agencies agree that the traditional format of bleisure, as a conference and then a networking hospitality event afterwards is no longer what attendees want. The most successful events will be those which blend experiences or leisure activities into the day, providing different types of opportunities to network and build relationships.

"People want events to be more informal and surprising, with creativity and entertainment designed into them. It's less about dividing experiences between business and fun. Rather, we should be blending fun and surprise in throughout."

**Jez Paxman, Strategy Director,
Live Union**

Dena Lowery, President, Opus Agency adds: "We should be looking more at what we can learn from B2C about the type of experiences people want to have at events. This could include looking at how we use augmented reality or AI to make events experiential."



LOOKING AHEAD:

- Businesses and organisations will want to pull learnings in from the experiences offered at B2C events, to ensure that attendees not only achieve their business goals but also enjoy the events they are attending.
- Augmented reality and AI will play a big role in improving experience at events, and helping attendees to build connections in the virtual, as well as physical world.



METHODOLOGY

To conduct a strategic research project looking at the future growth and success of the events industry in the UK, the key drivers behind event visitor behaviour, and the influencing factors in event attendance, ExCeL engaged research partner Luther Pendragon, who carried out the following research activity.

A survey of 266 delegates across two days at conferences in ExCeL London in June 2023 and analysis of the data, looking for differences between genders, generations, and whether the delegate had travelled to the event from the UK or outside of the UK. The age brackets used for the generation splits were:

- Gen Z: 18-26
- Millennial: 27-42
- Gen X: 43-58
- Boomer: 59+

Interviews in June-August with key industry leaders and event organisers and professionals across a range of industries including health, professional services, and technology. These interviews covered a range of topics crucial to the future success of the events industry in the UK including:

- The sustainability or legacy impact of an event
- Location: attributes, sentiment and preferences
- Opportunities to network inside and outside of events
- The value of networking and human interaction
- Leisure provision – maximising the opportunity of attending events 'beyond business'

A survey of event professionals from the ExCeL Event Leaders Exchange Community.

Interviews with senior professionals at a range of leading events agencies.

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