



ICCA

2021

ICCA Ranking

Destination Performance Index
(DPI)





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As COVID restrictions are generally being lifted around the world, we are looking back at the year 2021 while being mindful of the current economic and geopolitical issues at hand. Be it global pandemics, geopolitical tensions or any other kind of disruptive global event, the years 2020 and 2021 have demonstrated that the only proper response to volatility is adaptability.

As one of the main representatives of the global association community, ICCA would like to share the results of our collective adaptability in this year's 2021 ICCA Ranking. After the tumultuous year of 2020, the year 2021 can best be characterised as consolidative on the one hand and progressive recovery on the other.

Although we have yet to return to pre-pandemic numbers, we have gained significant ground on the road to full recovery. Further, we have transformed the meetings industry in the process. The technological advancements implemented out of necessity will serve our industry immensely in the years to come by preparing us for what some are already referring to as the Fourth Industrial Revolution. It is characterised by a fusion of technologies that will, ultimately, blur the lines between the physical, digital, and biological spheres.

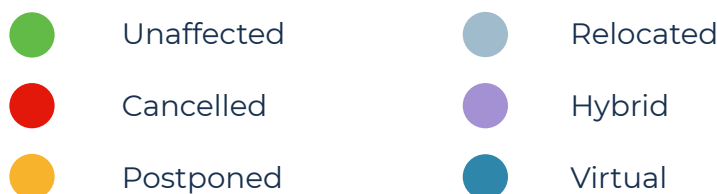
On the aforementioned road to full recovery and transformation we will need to maintain, as the saying goes, an attitude of expecting the unexpected.

Managing expectations in an unpredictable environment will be a challenge for all individuals involved in our industry –both suppliers and associations alike. Just keep in mind that challenges are a prerequisite for growth, be it on a personal level or amongst your professional peers within our close-knit community.

Introduction

This year's 2021 ICCA Ranking will contain a comparative analysis of the years 2021 vs 2020. It complements the online Destination Comparison Tool (DCT).

Like last year, we have again categorised the Corona-affected meetings as:



Due to this categorisation it is not possible to compare multiple years and present all the categories in the same overview in the DCT. Therefore, we have created two versions of the DCT in order to generate different views for our members. The details are explained in the DCT on ICCA's website.

This study differs from the DCT in that we dive deeper into the Virtual and Hybrid meetings, examining virtual and hybrid-onsite and online attendees and registration fees. These figures are not available in the DCT (for now). The attendees and registration fees in the DCT are the originally planned number of attendees and registration fees before the meeting was converted into a Virtual/Hybrid meeting. It will give you a better understanding of how these numbers were impacted by the pandemic.

Last year we omitted the Country/City-rankings due to the uneven playing field created by the pandemic. Now, although some regions were hit harder than others, all destinations have had the past year to adapt to the changing circumstances. In the pre-pandemic era, we would only include meetings that were actually held on-site, i.e. the "Unaffected" meetings. However, due to the pandemic the percentage of "Unaffected" meetings is less than 10%.

To resolve this issue, ICCA has developed the **Destination Performance Index (DPI)** in order to acknowledge and reward the effort put forth by destinations with regard to winning the original bid, COVID policies, adaptability and technological capabilities to convert on-site events into virtual/hybrid events –thereby maintaining business-continuation.

The DPI consists of the following performance indicators:



All of the above indicators result in separate rankings which are combined into the DPI. Please note that the Virtual status is assigned to the destination that initially won the meeting. However, ICCA cannot ascertain whether the destination itself was involved in hosting the virtual aspect of said meeting.

This study contains a small excerpt of the DPI. The full version is available as a static PDF file and a dynamic Excel file (both available in the DCT). The latter will give you the ability to sort on the different individual rankings as well.

Destination Performance Index

Top 20 countries

	Country	Planned	Unaff.	Virtual	Hybrid	Digit.	Bus.Cont.
1	U.S.A.	512	32	268	54	322	354
2	Spain	369	38	173	52	225	263
3	Germany	354	31	177	42	219	250
4	France	331	30	128	48	176	206
5	Italy	331	18	165	46	211	229
6	United Kingdom	337	12	190	29	219	231
7	Japan	364	3	185	61	246	249
8	Portugal	246	26	110	34	144	170
9	China-P.R.	233	12	79	71	150	162
10	Republic of Korea	211	5	87	56	143	148
11	Austria	166	15	85	30	115	130
12	Netherlands	226	10	115	21	136	146
13	Belgium	182	24	74	25	99	123
14	Canada	239	3	132	14	146	149
15	Sweden	183	13	94	11	105	118
16	Switzerland	146	16	64	27	91	107
16	Greece	149	15	61	25	86	101
18	Denmark	150	24	56	19	75	99
19	Poland	158	5	67	28	95	100
20	Australia	204	2	79	15	94	96



European countries make up 70% of the top 20, followed by Asian countries (15%) and North American countries (10%). Oceania, represented by Australia, claims a market share of 5%.

Compared to the top 20 country-rank of 2019, the same countries are represented with the exception of **Argentina** and **Brazil**, which were replaced by **Greece** and **Denmark**. **Austria** made the biggest jump, from 16th to 11th place.

In the top 10, due to a high number of Hybrid meetings, the **Republic of Korea** has replaced the **Netherlands**, totalling the number of Asian countries to three, together with **Japan** and **China-P.R.**

In the top 5, **Spain** jumped from 4th to 2nd place and **Italy** replaced the **United Kingdom** to claim 5th place.

Top 10 countries by performance indicators

Country	Planned	Country	Unaffected	Country	Virtual
1 U.S.A.	512	1 Spain	38	1 U.S.A.	268
2 Spain	369	2 U.S.A.	32	2 United Kingdom	190
3 Japan	364	3 Germany	31	3 Japan	185
4 Germany	354	4 France	30	4 Germany	177
5 United Kingdom	337	5 Portugal	26	5 Spain	173
6 France	331	6 Belgium	24	6 Italy	165
6 Italy	331	6 Denmark	24	7 Canada	132
8 Portugal	246	8 United Arab Emirates	21	8 France	128
9 Canada	239	9 Italy	18	9 Netherlands	115
10 China-P.R.	233	10 Switzerland	16	10 Portugal	110

Country	Hybrid	Country	Digitalization	Country	Bus
1 China-P.R.	71	1 U.S.A.	322	1 U.S.A.	354
2 Japan	61	2 Japan	246	2 Spain	263
3 Republic of Korea	56	3 Spain	225	3 Germany	250
4 U.S.A.	54	4 Germany	219	4 Japan	249
5 Spain	52	4 United Kingdom	219	5 United Kingdom	231
6 France	48	6 Italy	211	6 Italy	229
7 Italy	46	7 France	176	7 France	206
8 Germany	42	8 China-P.R.	150	8 Portugal	170
9 Portugal	34	9 Canada	146	9 China-P.R.	162
10 Austria	30	10 Portugal	144	10 Canada	149



The U.S.A ranked nr. 1 in the following rankings: Planned (512), Virtual (268), Digitalization (322) and Business continuation (354), whereas Spain had the most Unaffected (38) and China P.R. the most Hybrid (71) meetings.

Three Asian countries are represented in the top 10 of the DPI, there are no Asian countries within the top 10 ranking of Unaffected meetings, due to stricter COVID-policies compared to other regions. On the other hand, in the same ranking, the **United Arab Emirates** is ranked 8th, whereas their position in the DPI is 28th. They are the only Middle Eastern country represented in the 6 individual rankings.

The Asian countries (China-P.R., Japan and Republic of Korea) claim the top 3 in the Hybrid ranking.

Top 20 cities ranking

	City	Planned	Unaffected	Virtual	Hybrid	Digitalization	Bus
1	Vienna	113	9	61	22	83	92
2	Lisbon	123	7	59	25	84	91
3	Athens	87	10	40	16	56	66
4	Barcelona	90	9	41	13	54	63
4	Singapore	102	3	56	16	72	75
6	Madrid	79	11	32	19	51	62
7	Prague	95	3	44	14	58	61
8	Paris	84	7	31	12	43	50
9	Berlin	76	6	38	9	47	53
10	Brussels	66	16	25	11	36	52
11	Amsterdam	65	4	32	11	43	47
12	Budapest	57	10	26	10	36	46
13	Seoul	99	1	48	15	63	64
14	Copenhagen	70	13	24	8	32	45
15	London	67	2	39	8	47	49
16	Porto	65	9	30	5	35	44
16	Rome	48	4	24	12	36	40
16	Stockholm	58	4	30	6	36	40
19	Montreal, QC	68	1	46	6	52	53
20	Taipei	64	1	31	12	43	44



Europe holds a market share of **80%** in the top 20, followed by **Asia (15%)** and **North America (5%)**.

Compared to the top 10 city-rank of 2019, the same cities are represented with the exception of **Tokyo**, which has been replaced by **Brussels**. Looking further down the index, we can see the following newcomers in the top 20: **Budapest**, **Porto** and **Stockholm**, (the 2nd Portuguese and Scandinavian city in the top 20, respectively, after Lisbon and Copenhagen) and **Montreal**, the only **North American** city in the top 20.

Top 10 cities by performance indicators

City	Planned	City	Unaffected	City	Virtual
1 Lisbon	123	1 Dubai	17	1 Vienna	61
2 Vienna	113	2 Brussels	16	2 Lisbon	59
3 Singapore	102	3 Copenhagen	13	3 Singapore	56
4 Seoul	99	4 Madrid	11	4 Tokyo	51
5 Prague	95	5 Athens	10	5 Seoul	48
6 Dublin	93	5 Budapest	10	6 Montreal, QC	46
7 Barcelona	90	7 Barcelona	9	7 Helsinki	45
8 Athens	87	7 Porto	9	8 Prague	44
9 Paris	84	7 Vienna	9	9 Barcelona	41
10 Madrid	79	10 Lisbon	7	9 Dublin	41
10 Tokyo	79	10 Paris	7	10 Athens	40

City	Hybrid	City	Digitalization	City	Bus
1 Lisbon	25	1 Lisbon	84	1 Vienna	92
2 Vienna	22	2 Vienna	83	2 Lisbon	91
3 Madrid	19	3 Singapore	72	3 Singapore	75
4 Jeju	17	4 Seoul	63	4 Athens	66
5 Athens	16	5 Tokyo	60	5 Seoul	64
5 Singapore	16	6 Prague	58	6 Barcelona	63
7 Seoul	15	7 Athens	56	7 Madrid	62
8 Prague	14	8 Barcelona	54	8 Prague	61
9 Barcelona	13	9 Montreal, QC	52	9 Tokyo	60
10 Paris	12	10 Madrid	51	10 Berlin	53
10 Rome	12			10 Montreal, QC	53
10 Taipei	12				



Dubai ranked nr. 1 in the **Unaffected** ranking and 16th in the **Hybrid** ranking and is the only Middle Eastern city represented in the 6 individual top 20 rankings.

The number 1 position in the DPI was closely contested by Vienna and Lisbon. Vienna holds the number 1 spot in the **Virtual** and **Business Continuation** rankings, while Lisbon is number 1 in the **Planned**, **Hybrid** and **Digitalization** rankings. Due to a higher position in the **Unaffected** ranking, Vienna claimed the top position in the DPI.

Economic impact 2020 vs 2021

Registration

Items	2020	2021	Calculation										
2019 Estimated Total expenditure			\$10.817M based on 13.252 meetings										
Loss due to volume effect	\$3,953M	\$4,362M	2021 had 5.344 meetings less, (13.252-7.908), compared to 2019. This represents: a loss of $(5.344 \times \\$10.817M)/13.252 = \\$4.362M$										
Loss due to cancelled meetings	\$988M	\$271M	Of the 7.908 planned meetings in 2021, 332 were cancelled. This represents: a loss of $(332 \times \\$10.817M)/13.252 = \\$271M$										
Loss due to postponed meetings	\$3,032M	\$1,761M	Of the 7.908 planned meetings in 2021, 2.157 were postponed. This represents: a loss of $(2.157 \times \\$10.817M)/13.252 = \\$1.761M$										
Virtual/Hybrid expenditure loss and others	\$1,179M	\$2,076M	Virtual & Hybrid meetings have a lower Economic impact compared to face-2-face meetings. In addition, fluctuation in avg registration fee and avg attendance between 2019 and 2021 are incorporated in this amount.										
			<table><tr><td>2019 Estimated total expenditure</td><td>\$10,817M</td></tr><tr><td>Loss due to volume effect</td><td>\$-4,362M</td></tr><tr><td>Loss due to cancelled meetings</td><td>\$-271M</td></tr><tr><td>Loss due to postponed meetings</td><td>\$-1,761M</td></tr><tr><td>2021 Estimated total expenditure</td><td>\$-2,347M</td></tr></table>	2019 Estimated total expenditure	\$10,817M	Loss due to volume effect	\$-4,362M	Loss due to cancelled meetings	\$-271M	Loss due to postponed meetings	\$-1,761M	2021 Estimated total expenditure	\$-2,347M
2019 Estimated total expenditure	\$10,817M												
Loss due to volume effect	\$-4,362M												
Loss due to cancelled meetings	\$-271M												
Loss due to postponed meetings	\$-1,761M												
2021 Estimated total expenditure	\$-2,347M												
			A loss of \$2,076M										

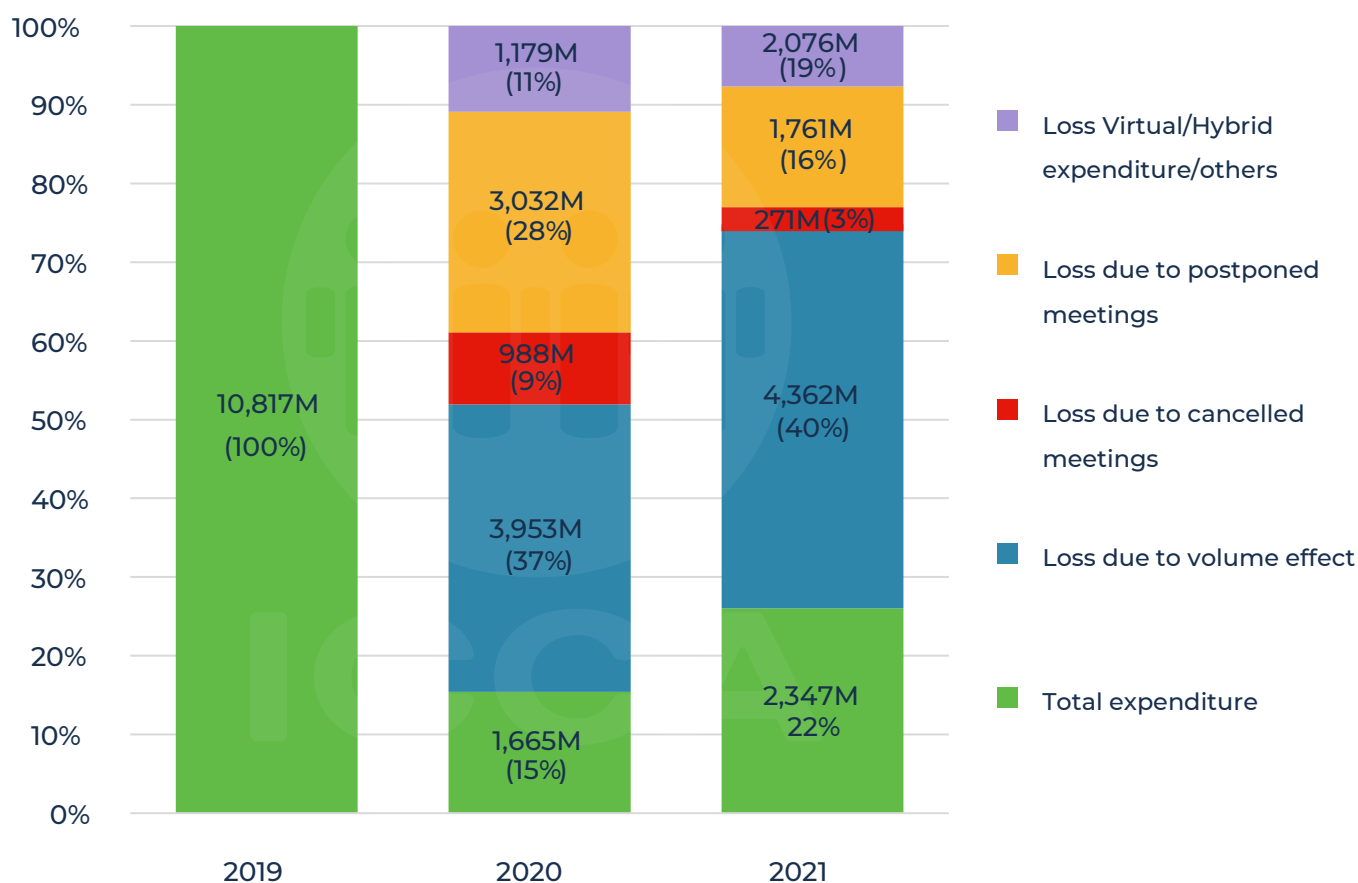
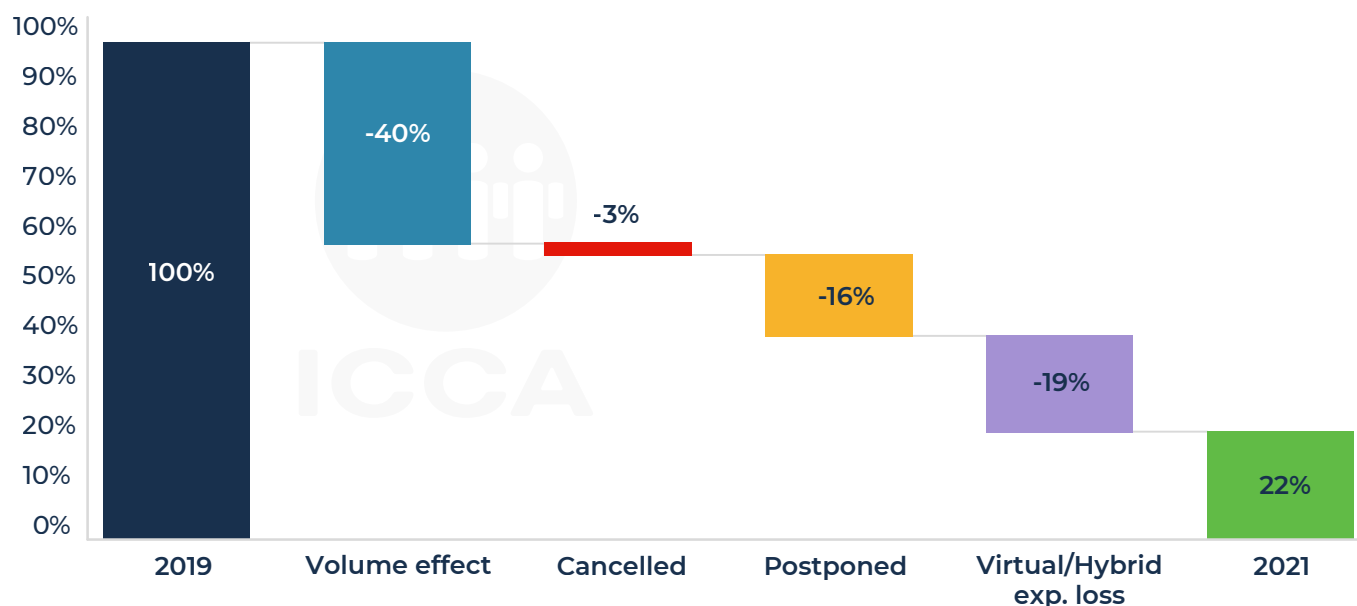
Note: the average total expenditure presented in this tables is calculated based on the assumption that 22% of the total delegate expenditure is spent on the registration fee. This assumption is based on two studies performed in 2004 by the Vienna Convention Bureau and the Finland Convention Bureau.

During ICCA's Annual Congress in Houston 2019, ICCA performed a similar study amongst its members. The outcome of this study was approx. 25%. Therefore, the 22% is still used in current calculations.

Economic impact 2020 vs 2021

Items	2020	2021	Calculation
2021 Estimated Total Expenditure	\$1,665M	\$2,347M	Number of unaffected/relocated meetings: $534 + 127 = 661$ Average number of attendees for unaffected/relocated meetings: 435 Average registration fee for unaffected/relocated meetings: \$585 Estimated total expenditure for unaffected/relocated meetings: $(534 \times 435 \times \\$585)/0.22(*) = 618M$ Total number of virtual meetings is: 3,718 Average number of attendees for virtual meetings is: 840 Average registration fee for virtual meetings is: \$204 Estimated total expenditure for virtual meetings: $3,718 \times 840 \times \\$204 = 637M$ Total number of hybrid meetings is: 1,040 Average number of attendees for hybrid-onsite meetings is: 415 Average registration fee for hybrid-onsite meetings is: \$454 Estimated total expenditure for hybrid-onsite meetings: $(1,040 \times 415 \times \\$454)/0.22 = 891M$ Total number of hybrid meetings is: 1,040 Average number of attendees for hybrid-online meetings is: 754 Average registration fee for hybrid-online meetings is: \$256 Estimated total expenditure for hybrid-online meetings: $1,040 \times 754 \times \\$256 = 201M$
Estimated total expenditure for unaffected/relocated/virtual/hybrid meetings: 2,347M			

Economic impact of COVID 19 on total expenditure 2019 vs. 2021



Number of events 2021 vs 2020

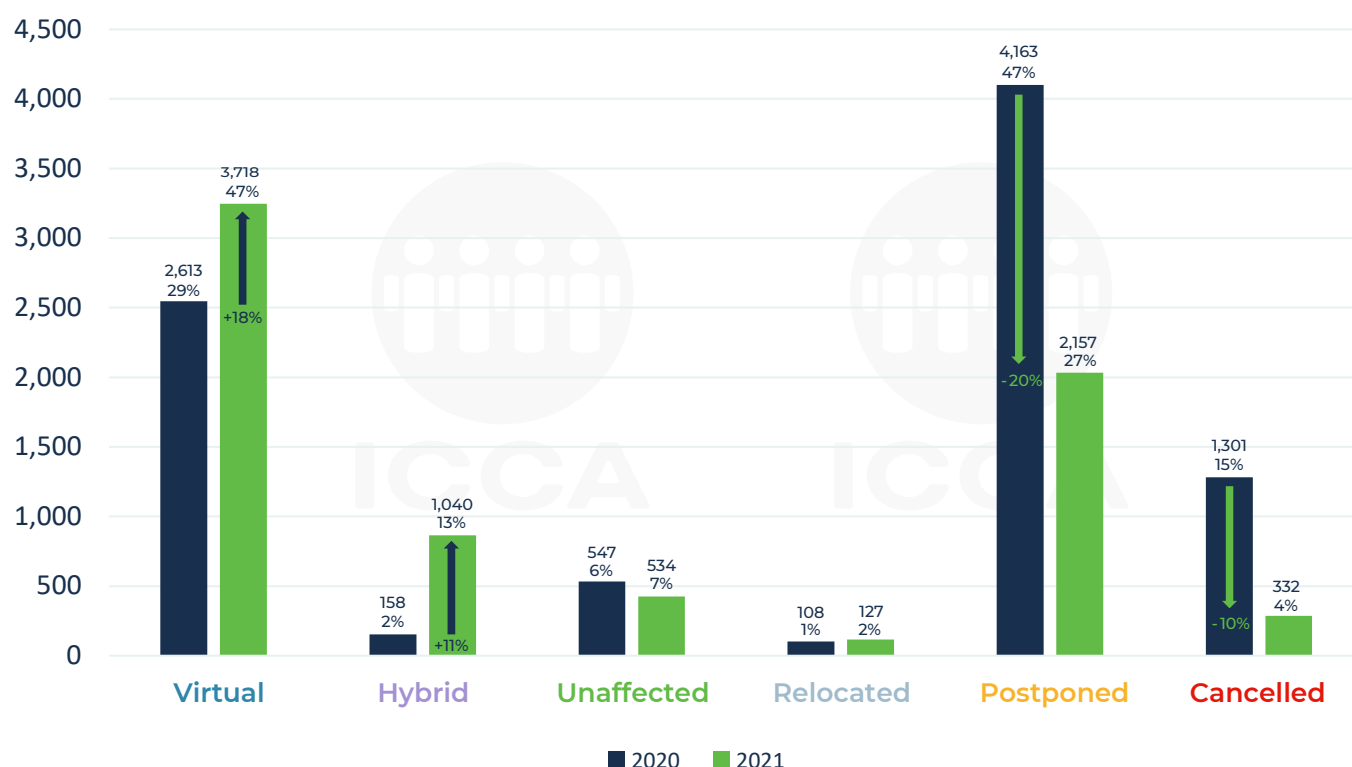
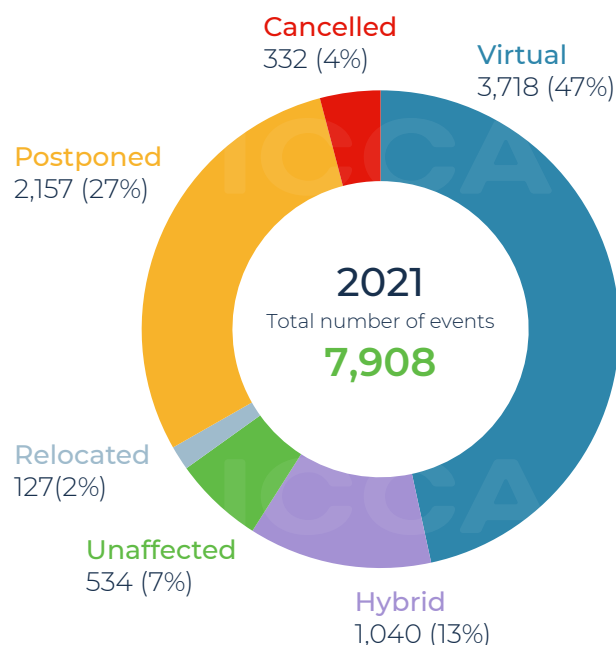
2021

In 2021, the market share of **Virtual** and **Hybrid** meetings has **doubled** compared to 2020, **60% vs. 31%**.

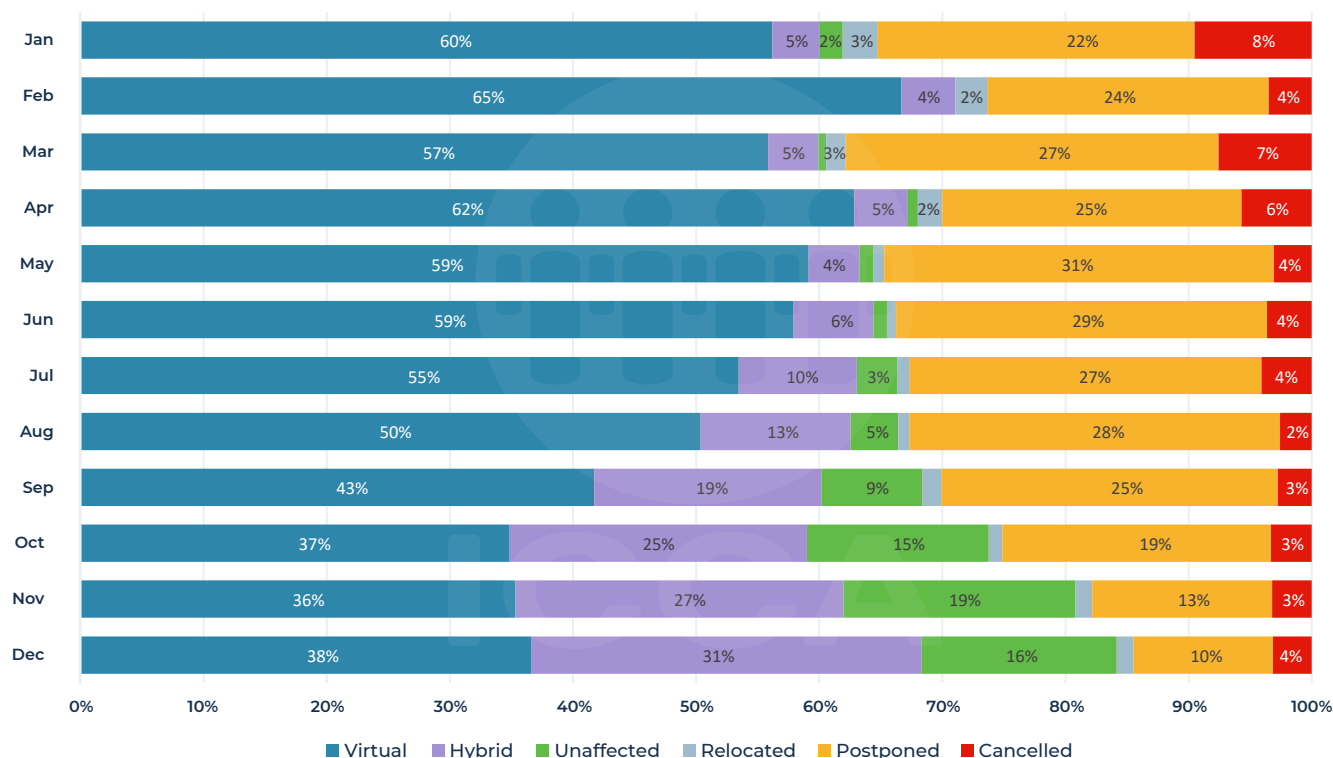
Virtual and **Hybrid** meetings have **increased** by **+18%** and **+11%**, respectively, which was mirrored by a decrease in **Postponed** (-20%) and **Cancelled** (-10%) meetings.

Furthermore, **Unaffected** (7%) and **Relocated** (2%) meetings remain more or less at the same market share.

This is a clear sign of an overall progressive recovery within the association meetings industry



Number of events by month



A clear shift is observed from **Virtual** to **Hybrid** meetings as the year progressed, from **5%** to **32%** at year's end.

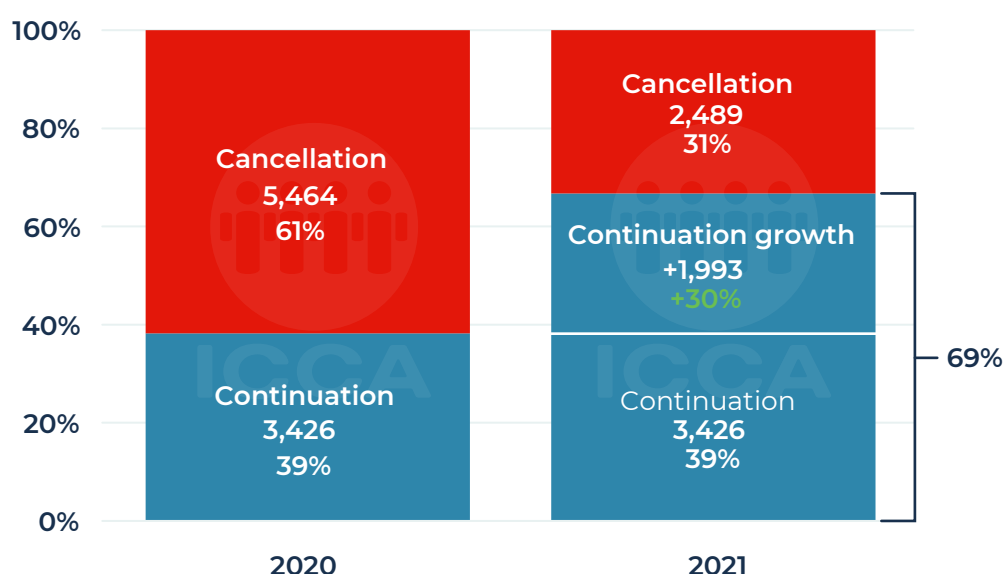
Postponement and **cancellation** decreased throughout the year from **30%** to **14%** as associations were anticipating an increased duration of the pandemic. In 2020, the percentage of **Postponed/Cancelled** events was hovering around **60%** throughout the year.

Meanwhile, the percentage of **unaffected** meetings in 2021 showed the opposite trend, starting at **2%** in January and trending towards **20%** at the end of the year. In 2020, **unaffected** meetings were reduced to less than **10%** from April onwards.

Digitalization remained more or less constant (**60-70%**) throughout the year, however, a clear shift is observed from **Virtual** to **Hybrid** meetings as the year progressed, with the latter increasing from **5%** to **31%** at year's end. **Virtual** meetings on the other hand decreased from **60%** to **38%**.

Business continuation 2020 vs 2021

Business continuation



Business continuation, which includes **unaffected**, **relocated**, **hybrid** and **virtual** meetings, has increased from **39%** to **69%** (+30%) within one year.

On the other side, **Business cancellation**, which includes **postponed** and **cancelled** events, has halved from **61%** to **31%**.

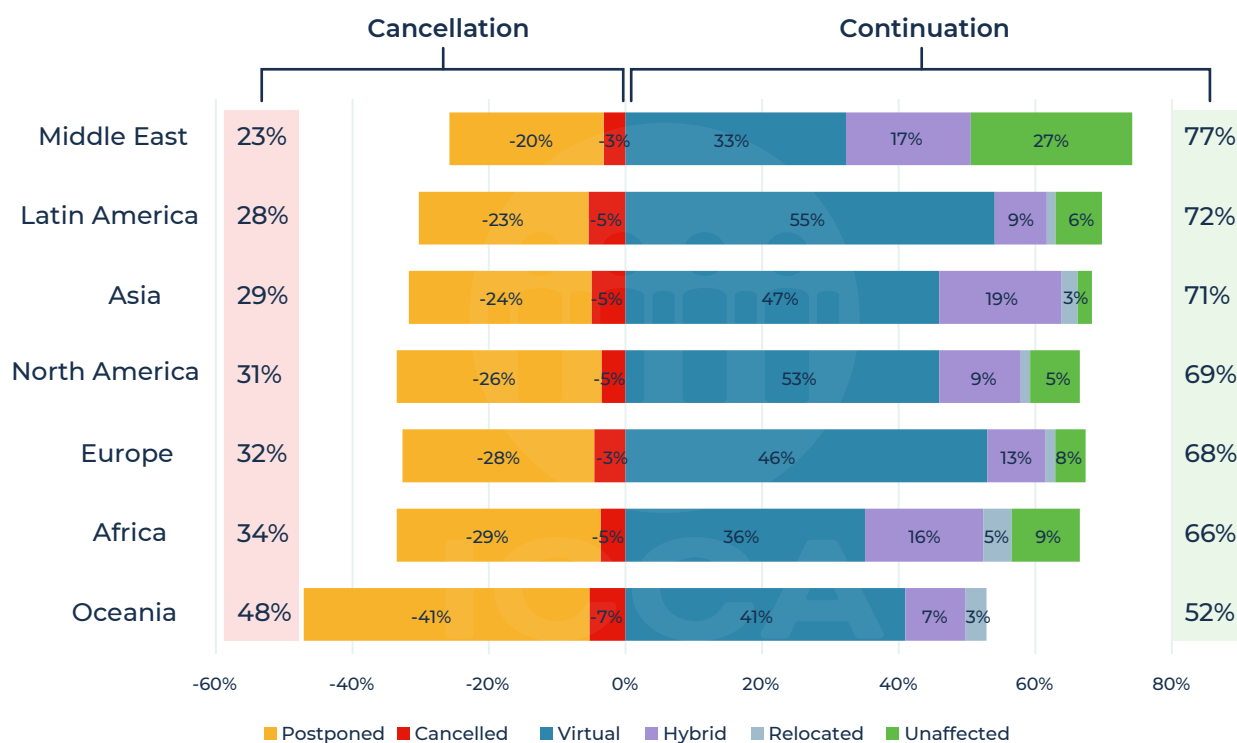


In general, we can state that the ratio **Continuation/Cancellation** has flipped from **1:2** to **2:1**, a hopeful sign of progressive recovery.

	Business Cancellation							Business Continuation	Totals
	Postponed	Cancelled	Virtual	Hybrid	Relocated	Unaffected			
Europe	1,435	158	1,277	2,084	579	55	372	3,090	4,525
Asia	430	74	356	690	271	37	36	1,034	1,464
North America	267	43	224	452	78	11	44	585	852
Latin America	144	27	117	281	45	6	31	363	507
Africa	71	10	61	76	34	10	20	140	211
Oceania	119	17	102	102	18	8	3	131	250
Middle East	24	3	21	35	18	0	28	81	105
Totals	2,490	332	2,158	3,720	1,043	127	534	5,424	7,914

Cancellation vs continuation 2021

Meetings by region



With **77%**, the **Middle East** has the highest business continuation rate of all regions, followed by **Latin America (72%)** and **Asia (71%)**. Of all regions, **Latin America** has shown the biggest growth in business continuation compared to 2020, with an increase of **+35%**.

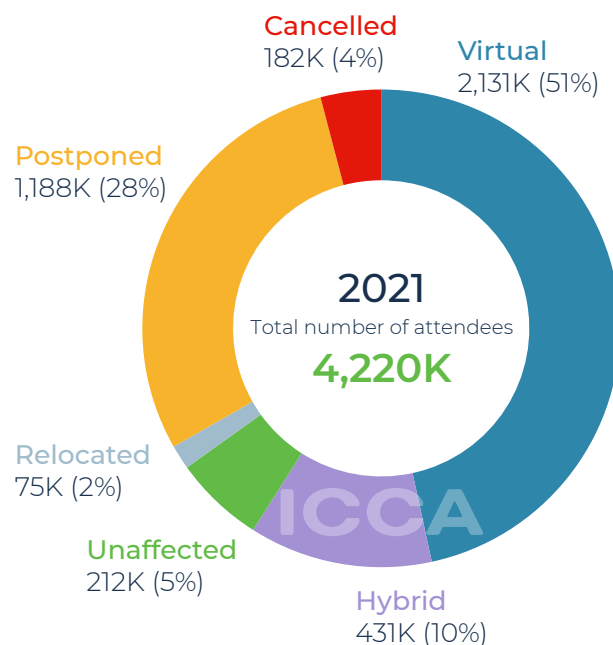
	Business continuation		Growth
	2020	2021	2021
Latin America	36%	72%	35%
Asia	38%	71%	33%
Europe	37%	68%	31%
Middle East	47%	77%	30%
Africa	37%	66%	30%
North America	47%	69%	21%
Oceania	39%	52%	13%

Number of attendees 2020 vs 2021

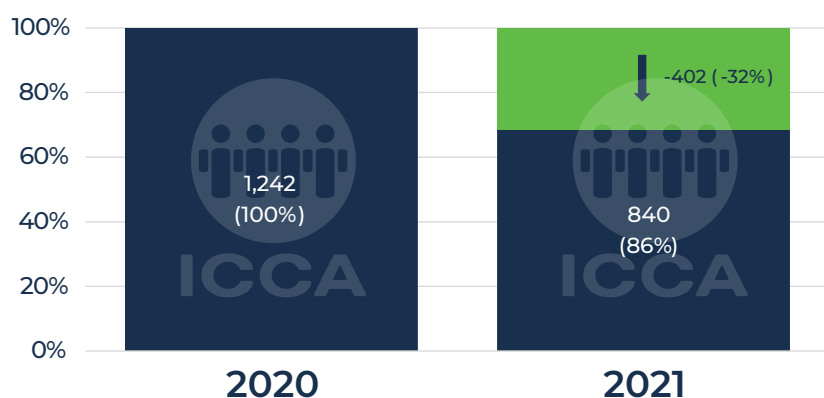
PAX

The number of pax with regards to business cancellation, which includes **postponed** and **cancelled** meetings was **2,154K (53%)** in the year 2020 and decreased to **1,370K (32%)** in 2021.

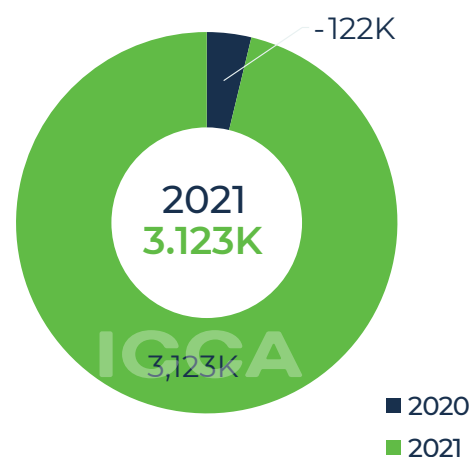
The number of pax for **unaffected** meetings decreased from **280K (7%)** in 2020 to **212K (5%)** in 2021. The probable cause for this is that meetings in Jan/Feb 2020 were not yet affected by the pandemic, resulting in a higher number of **unaffected** meetings/pax in 2020 vs. 2021.



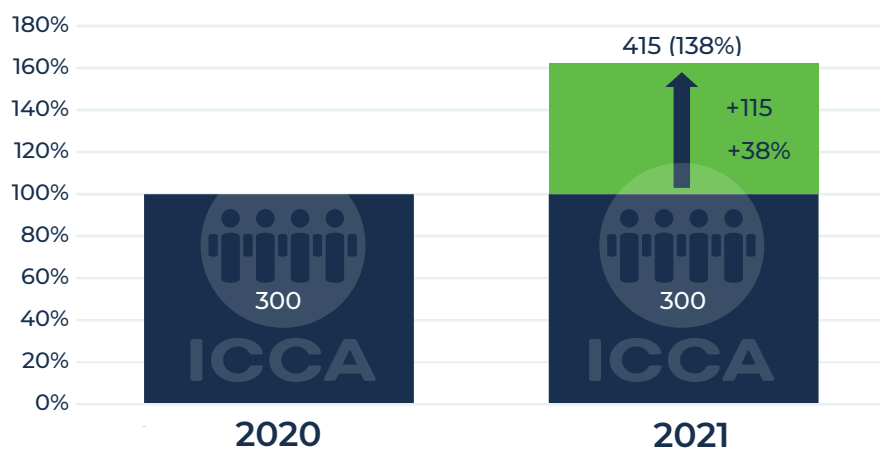
Virtual average pax



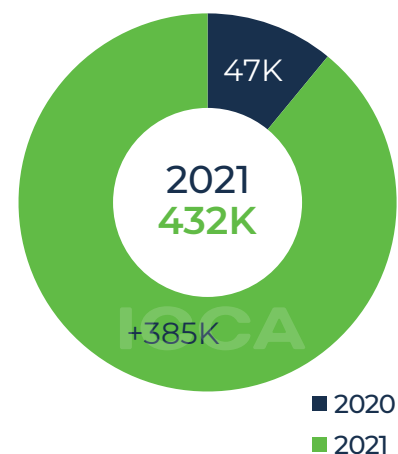
Virtual est.
total pax



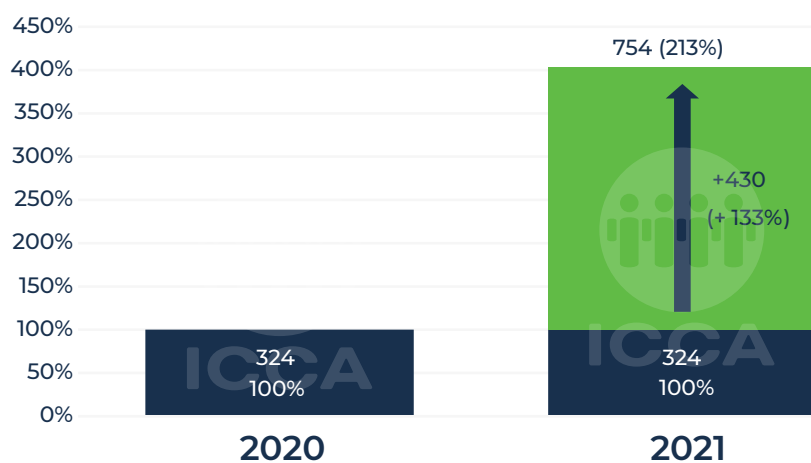
Hybrid On-site average pax



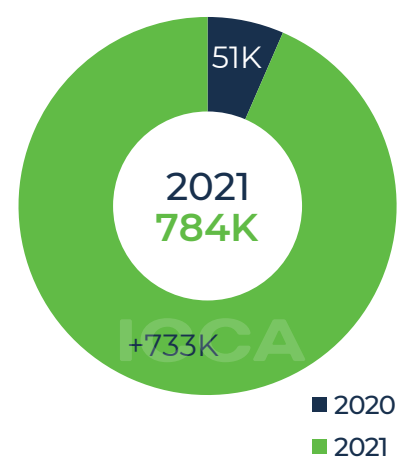
Hybrid On-site est. total pax



Hybrid Online avg. pax



Hybrid Online est. total pax



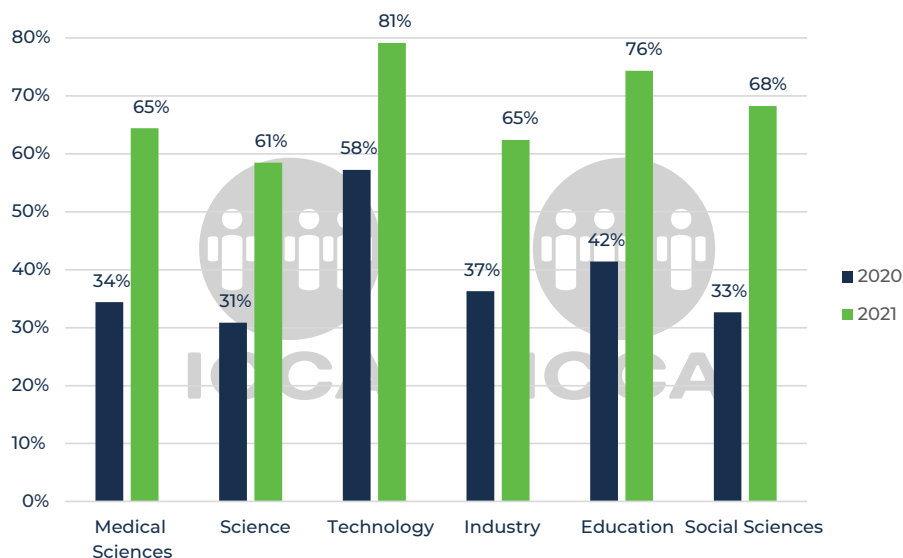
Number of attendees 2020 vs 2021

	Countries	Est. pax hybrid/virtual planned	Est. pax hybrid onsite actualized	Est. pax hybrid online actualized	Est. pax virtual actualized	Est. pax hybrid/virtual actualized
1	Italy	117K	18K	24K	189K	230K
2	France	137K	18K	39K	163K	221K
3	United Kingdom	139K	15K	51K	145K	211K
4	U.S.A.	165K	31K	14K	163K	208K
5	Spain	130K	23K	23K	148K	194K
6	Poland	35K	8K	168K	9K	184K
7	Japan	110K	21K	78K	79K	178K
8	Chinese Taipei	62K	9K	11K	154K	175K
9	Netherlands	88K	15K	38K	117K	169K
10	Austria	132K	15K	11K	101K	127K
11	Sweden	54K	2K	3K	115K	121K
12	China-P.R.	65K	28K	38K	47K	114K
13	Czech Republic	62K	8K	11K	94K	113K
14	Republic of Korea	59K	20K	24K	57K	101K
15	Australia	74K	7K	13K	82K	101K

	Cities	Est. pax hybrid/virtual planned	Est. pax hybrid onsite actualized	Est. pax hybrid online actualized	Est. pax virtual actualized	Est. pax hybrid/virtual actualized
1	Paris	70K	3K	1K	184K	189K
2	Barcelona	62K	10K	43K	91K	144K
3	Taipei	51K	7K	9K	127K	143K
4	London	60K	6K	6K	117K	129K
5	Vienna	121K	13K	8K	84K	105K
6	Prague	57K	7K	2K	85K	94K
7	Singapore	63K	6K	27K	43K	76K
8	Stockholm	33K	1K	2K	68K	71K
9	Lisbon	53K	11K	24K	36K	71K
10	Amsterdam	37K	11K	20K	27K	58K
11	Rome	21K	6K	2K	42K	50K
12	Seoul	30K	6K	7K	37K	50K
13	Glasgow	25K	1K	9K	35K	45K
14	Florence	15K	1K	1K	41K	42K
15	Dublin	21K	1K	1K	40K	42K

Subject matters 2020 vs 2021

Business continuation by subject



Subject	2020	2021	Growth
Medical Sciences	34%	65%	31%
Science	31%	61%	30%
Technology	58%	81%	23%
Industry	37%	65%	29%
Education	42%	76%	34%
Social Sciences	33%	68%	36%
Management	45%	77%	32%
Economics	38%	74%	36%
Agriculture	23%	53%	31%
Culture & Ideas	33%	64%	31%
Transport & Communication	46%	72%	26%
Ecology & Environment	36%	63%	27%
Commerce	36%	73%	38%
Law	33%	66%	33%
Sports & Leisure	41%	67%	26%
Linguistics	33%	72%	39%
Arts	38%	69%	31%
Mathematics & Statistics	39%	74%	35%
Historical Sciences	21%	62%	41%
Safety & Security	33%	73%	40%
Literature	31%	62%	31%
Library & Information	50%	81%	31%
Architecture	50%	83%	33%
Geography	28%	65%	37%

Virtual/Hybrid pax and registration fees

Registration

Income/loss (USD) meetings turned virtual

	2021	2020
Avg pax (original meetings)	573	569
Avg fee (original meetings)	436	477
Nr of meetings turned virtual	3,718	2,613
Est. total income fee (original meetings)	929M	709M
Avg pax (virtual meetings)	840	1,245
Avg fee (virtual meetings)	204	201
Nr of meetings turned virtual	3,718	2,613
Est. total income fee (virtual meetings)	637M	654M
Est. total income fee loss due to meetings turning virtual	-292M	-55M

Income/loss (USD) meetings turned hybrid

	2021	2020
Est. Avg pax (pre-pandemic)	485	316
Est. Avg fee (pre-pandemic)	534	583
Nr of meetings turning hybrid	1040	158
Est total income fees (before turning hybrid)	269M	29M
Avg pax (hybrid-onsite)	415	302
Avg fee (hybrid-onsite)	454	552
Nr of meetings turned hybrid	1040	158
Est. total income fees meetings (hybrid-onsite)	196M	26M
Avg pax (hybrid-online)	754	1,181
Avg fee (hybrid-online)	256	264
Nr of meetings turned hybrid	1040	158
Est. total income fees meetings (hybrid-online)	201M	49M
Est. total income fee gained due to meetings turning hybrid	127M	46M



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