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Changing ecosystems – future scenarios for business events in the age of borderless communication

Innovation Network "Future Meeting Space"

Co-Initiator:

GCB
Meetings made in Germany
● ● ● German Convention Bureau

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Preface

As initiators of the "Future Meetings Space" network, the Fraunhofer Institute for Industrial Engineering IAO and the GCB German Convention Bureau e. V. have been conducting joint research since 2015, with many partners who are committed to innovation. Our recent research project, which has been concluded now, started at the beginning of 2021 and probably none of our previous research phases took place during such an eventful, fast-changing period: The pandemic was already in full swing, and events were mainly held virtually or in hybrid set-ups. It quickly became clear that the ecosystem of events would see fundamental and permanent changes.

We are facing a complex future in all areas of life, be it economic, social or political. While this will entail many challenges and certainly also difficult tasks, it is also currently creating an immense number of opportunities for the world of events. Business events are as relevant as ever. In fact, in a multi-layered environment with global challenges such as climate change and pandemics, they remain one of the essential instruments for solving complex issues. People coming together in a professional context ensure knowledge transfer and the formation of new networks. Business events provide valuable input for economic, social and political processes. They do this sometimes in a small, intimate space, sometimes with the involvement of experts from all over the world. Whatever the format may be, they are always authentic and have long-lasting impact. With the results of the Future Meeting Space research phase 2021 that we present in this study, we want to provide all stakeholders who work on the future of business events with guidelines and inspiration.

The future will come, no matter what but what that future will look like is not a coincidence. It is up to us to take the future into our own hands. This applies to our own personal microcosm as well as to social processes and thus, of course, to all event professionals, such as organisers, and service providers, as well as attendees. Let's use the emerging opportunities and move together towards a successful future of events.

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1. Status quo

1.1 The importance of business events

Meetings, conferences, and congresses are platforms for the exchange of know-how, experiences, and ideas. They provide essential input for political, economic, scientific, and social processes and thus promote innovation and generate solutions. In Germany, meetings and congresses play an important economic role: in the 2019 ranking of the International Congress & Convention Association (ICCA), Germany was ranked first among European meeting and congress destinations, a position it has been holding for many years. Worldwide, Germany ranks second behind the USA. In 2019, almost three million events with over 420 million attendees took place in Germany. Business events are important for Germany as a business location. Before the start of the pandemic, Germany regularly occupied top positions as a meeting and convention destination globally, including in the rankings of the International Congress & Convention Association (ICCA) or in the IPK World Travel Monitor. The country's excellent global brand image, its wide range of business and science skills and competences and a first-class infrastructure create an excellent foundation for securing this top position in the future.

Influenced by the Covid-19 pandemic, the world of events is changing. While meetings, conventions and congresses are particularly affected by the restrictions in place, the situation also shows how a change in circumstances can also trigger change and progress. The pandemic acts as an accelerator and inspires a great variety of new solutions, particular with regard to digital and hybrid developments. Within a very short time, events shifted from the physical to the virtual space. The current assumption is that the market for events attended for professional reasons will permanently change both quantitatively and qualitatively due to the pandemic experience. In order to better classify current developments and trends in the overall context of a changed ecosystem, a fundamental consideration of the changes in environmental factors is necessary.

1.2 Review of previous research phases

In the first research phase from 2015 to 2016, the innovation network's research partners identified and analysed developments in society, methodology, technology, mobility, and infrastructure and their respective effects on the event sector. A key result of this process was the development of six innovative event scenarios.

The second research phase was dedicated to identifying different types of event attendees, looking at how they differ in essential aspects as well as assessing whether and how the use of different methodological and technological elements affects them in terms of acceptance, knowledge transfer, learning progress and experience value. In addition, we identified six key success factors that are interrelated and influence each other, i.e., networking, disruption, digitalisation, knowledge transfer, interaction and satisfaction.

The third research phase focused on the role of events in the communication mix of organisations, with the aim of developing future scenarios for the role of events, describing the resulting success factors and requirements and defining the relevant changes for events, organisations, venues, and staff.

This study focuses on business conferences and congresses, i.e. places for people coming together to exchange ideas, generate knowledge and form networks. In the following, all terms used for the events industry refer collectively to the ecosystem relating to business events.

1.3.1   Future Meeting Space initiators

The FMS innovation network was launched in 2015 by the GCB German Convention Bureau e. V. in cooperation with the Fraunhofer Institute for Industrial Engineering IAO. The research project focuses on trends, innovations and social developments and their possible influences on business events. In this context, our research focuses on how to design future events, how the requirements of attendees change and what kind of requirements result from that for all stakeholders involved in the event planning process.

Research results

Excerpts of the research results to date are available on www.future-meeting-space.com.

1.3 The Future Meeting Space innovation network

The Future Meeting Space (FMS) innovation network systematically anticipates relevant developments in the events sector in order to identify indications for future requirements with regard to the organisation of events, the technology as well as the spaces needed. Together with partner organisations, the innovation network not only reveals developments and opportunities, but also offers practical recommendations.

Our innovation network focuses on providing evidence-based information and important key figures as a basis for decision-making for all relevant stakeholders, with the aim of making a valuable contribution to the ongoing innovation of events.

The GCB German Convention Bureau e. V. represents Germany as a globally leading, sustainable conference and meetings destination, supporting its members and partner organisations in their domestic and international marketing and positioning of their offerings, acting as a driving force. The associations' approximately 160 members represent over 400 companies and include leading hotels, congress centres, venues, municipal marketing organisations, event agencies and service providers in the German conference and congress sector. As part of the Fraunhofer-Gesellschaft, the Fraunhofer Institute for Industrial Engineering IAO is one of the largest organisations for applied research in Europe. The central task of the Fraunhofer-Gesellschaft is "research for practice" in close cooperation with industry and public sector clients to advance innovation processes and the development of key technologies.

1.3.2 Objectives of the innovation network

Our innovation network aims at developing ideas, concepts and practical solutions for the ongoing development of the German event sector. This research is an important building block for securing innovation leadership to remain competitive and keep the country's market position as a conference and meeting destination in the future. In the fourth research phase, we devised future scenarios to develop innovations for future events. Each scenario treated events as existing in an eco-system which is characterised by different influencing factors. As a result, we established practical scenarios for physical, hybrid and virtual meeting spaces and examined how they are embedded in a changed ecosystem, considering the changed general conditions. The latter conditions include, e.g., new technologies, the changed booking and travel behaviour of event attendees, new competing providers or new ways of taking part in events (virtually).

To tackle this complex research task, the FMS innovation network collaborates with innovative technology companies, solution providers, forward-thinking event organisers and destinations.

1.3.3 Innovation network partners

Research partners of the fourth research phase, which analysed the changed ecosystem of business events, are:

- allseated GmbH (Virtual Venue-Partner)
- BAYERN TOURISMUS Marketing GmbH
- Deutsche Bahn AG
- Deutsche Hospitality
- Encore EMEA – KFP Five Star Conference Service GmbH
- EVVC Europäischer Verband der Veranstaltungs-Centren e. V.
- JenaKultur
- Cologne Convention Bureau
- NürnbergConvention
- Radisson Hotel Group
- 7 Cities
- Stadt Münster/Münster Marketing
- Weframe AG

In addition, the International Congress and Convention Association (ICCA) supports the FMS innovation network as a Strategic Industry Partner.

Project management
Organisation and management

GCB
Meetings made in Germany
● ● ● German Convention Bureau

Research meetings
Best practice visits
Networking

Research
Conception and processing of the research topics

Fraunhofer
IAO

Research partners
Participation in research meetings, transfer to the company and contribution of expert knowledge

2. Research phase 2021: developing scenarios

The ecosystem of events will change profoundly in the future. New technologies, the consequences of climate change, new forms of mobility and more flexible ways of working will have a lasting impact on what is required from events, creating new attendee needs based on different life and working styles.

The effects of the changes, including the ones brought about by the pandemic, can currently only be predicted to a limited extent. We therefore chose to work with scenario planning for our 2021 research phase in order to consider all options and not to exclude any possible development right from the start, this method enables the development of different future scenarios and their specific effects on the ecosystem of business events. The scenario process consisted of the following steps: definition of influencing factors on the basis of current trend research and the clustering of topics, identification of key factors with their respective definition and characteristics, integration of the key factors and their characteristics in an intelligent scenario programme and the composition of raw scenarios on which basis three essential trend scenarios were identified.

INFLUENCING FACTORS

MOBILITY

HABITAT AND REAL ESTATE

SUSTAINABILITY

WORLD OF WORK

SOCIETY

MARKET

POLITICAL FRAMEWORK

NEW TECHNOLOGIES

CULTURE OF KNOWLEDGE

EVENT FORMATS

KEY FACTORS

BUSINESS TRIPS

HOME OFFICE
WORKCATION
FLEXIBILISATION

VIRTUALITY
SOCIAL NETWORKS
HYBRID EVENTS

URBAN ESCAPE
SMART CITIES/REGIONS
CITY CENTRES

DIVERSITY

LIFELONG LEARNING

ENVIRONMENTAL AWARENESS
CLIMATE CHANGE
GENERATION GLOBAL

SHARING ECONOMY
PLATFORM ECONOMY
DIGITAL COMPETENCE

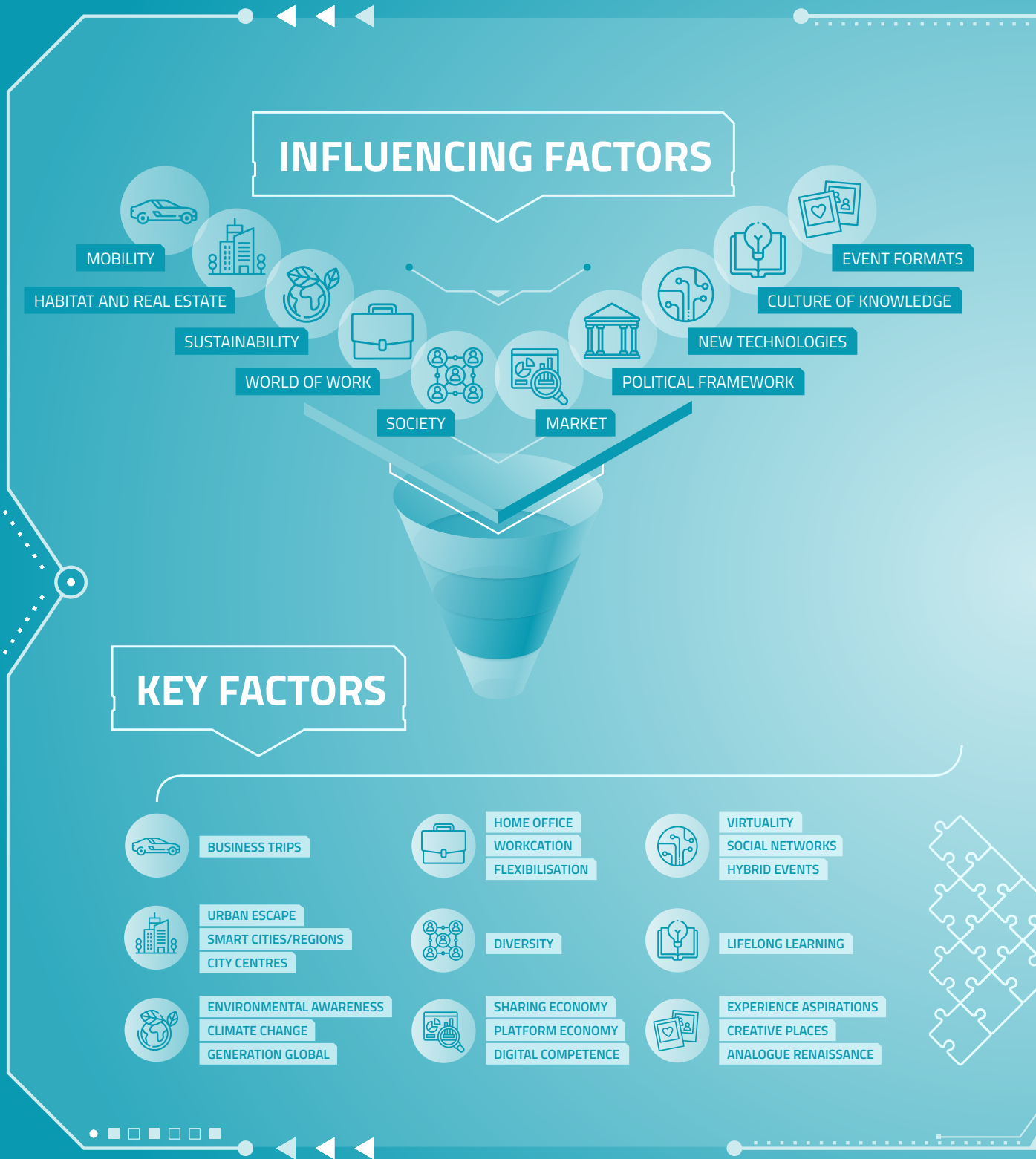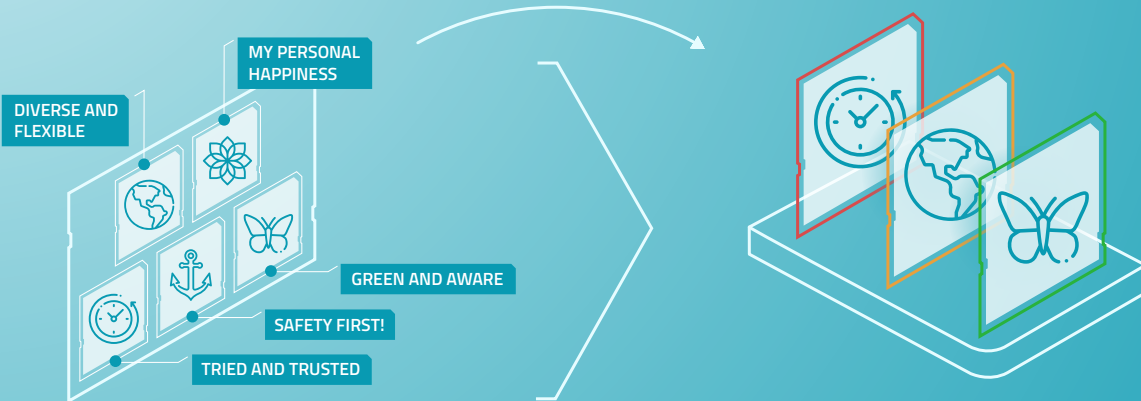EXPERIENCE ASPIRATIONS
CREATIVE PLACES
ANALOGUE RENAISSANCE

Fig. 1: Illustration of the research process: development of trend scenarios based on key topics and influencing factors.

RAW SCENARIOS

TREND SCENARIOS

DIVERSE AND FLEXIBLE

MY PERSONAL HAPPINESS

GREEN AND AWARE

SAFETY FIRST!

TRIED AND TRUSTED

2.1 Developing trend scenarios

In order to outline different usage scenarios, ten key areas with various influencing factors were defined on the basis of various trends that had been researched. These ten topics, their definition and corresponding influencing factors can be found in the white paper "Future Meeting Space – ten topics that impact on future events". They are:

- Mobility
- Habitat and real estate
- Sustainability
- World of work
- Society
- Market
- Political framework
- New technologies
- Culture of knowledge
- Event formats

In order to reduce the corresponding 60 or so influencing factors to essential key factors, they were compared, and their mutual influence was evaluated by event industry experts using an impact matrix focusing on a two-sided consideration of the factors, each of which could be rated as having a high or low influence (on a scale of one to three).

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Example:

"Climate change has a strong impact on business travel."
(Rated with 3)

"Business travel has a low impact on social diversity."
(Rated with 1)

On the basis of this mutual evaluation, we established active and passive sums for each influencing factor and identified the top 20 influencing factors on the basis of the sum total. The resulting key factors have the greatest impact on the new event ecosystem. They were used to develop the different scenarios.

In a further step, a software-supported qualitative system and scenario analysis was used to group different raw scenarios, each containing different constellations of the key factors. In order to avoid inconsistency between the different combinations of the characteristics in the respective scenarios, characteristics that are mutually exclusive were defined beforehand.

Based on the scenario analysis and the preceding definition of key factors and their characteristics, a total of three consistent scenarios for the future event ecosystem could be identified. Despite considering the degree of influence of the key factors and their consistent composition, it is more likely, that mixed forms become reality than the entire scenarios itself.

2.2 Impact of the scenarios on business events

The three scenarios outlined illustrate how much our world changes because of the different influencing factors. Events are in many areas strongly influenced by what is happening around us. Depending on how social values, political orientations, the office and working world as well as the built environment and real estate situation change in the future, the event industry will also change accordingly.

For better presentation and readability, the effects are divided into sub-sections, each highlighting different elements of an event:

- Venues/Destinations
- Event formats
- Technologies
- Skills profiles

Based on the three trend scenarios and how they can be applied to the future development of the event industry, recommended actions were then formulated.

Different stakeholders will be faced with different requirements in order to handle the developments described. The effects are divided according to the internal organisational structure and the range of products and services offered by organisers, service and infrastructure providers and destination marketing organisations (DMO).

The effects and recommended actions form the basis for identifying future potential, which can be seen as opportunities and possibilities which are independent of the scenarios. They concern both the event agenda and type as well as the venues and describe partial aspects that can be used as overarching ideas in order to react to changes in the ecosystem, such as changing social characteristics.

The three trend scenarios are presented in the next chapter, structured as follows:

- Scenario description
  - Living space and real estate
  - Social and political characteristics
  - Office and working environment
- Application to business events
- Definition of specific recommended actions

3. Scenario 1: "Tried and trusted – renaissance of the real"

"Traditional values determine our behaviour. People tend to rely on the tried and trusted. The working world is characterised by stable organisational structures with little flexibility and not a lot of room for manoeuvre. Consequently, the event industry is faced with changed requirements.

Attendees expect a return to the 'good old days' with conventional in-person event formats. The share of virtual and hybrid events is decreasing, while the value of physical events is increasing strongly. High standard facilities are valued, as are extra services and a club mentality."

TRIED AND TRUSTED –
RENAISSANCE OF
THE REAL

LIVING SPACE
AND REAL ESTATE

> PROFESSIONALS CLOSELY TIED
TO THEIR COMPANY LOCATION

> GATED COMMUNITIES

> MIGRATION TO URBAN REGIONS

> MEGACITIES

> LARGE RETAIL CHAINS AND
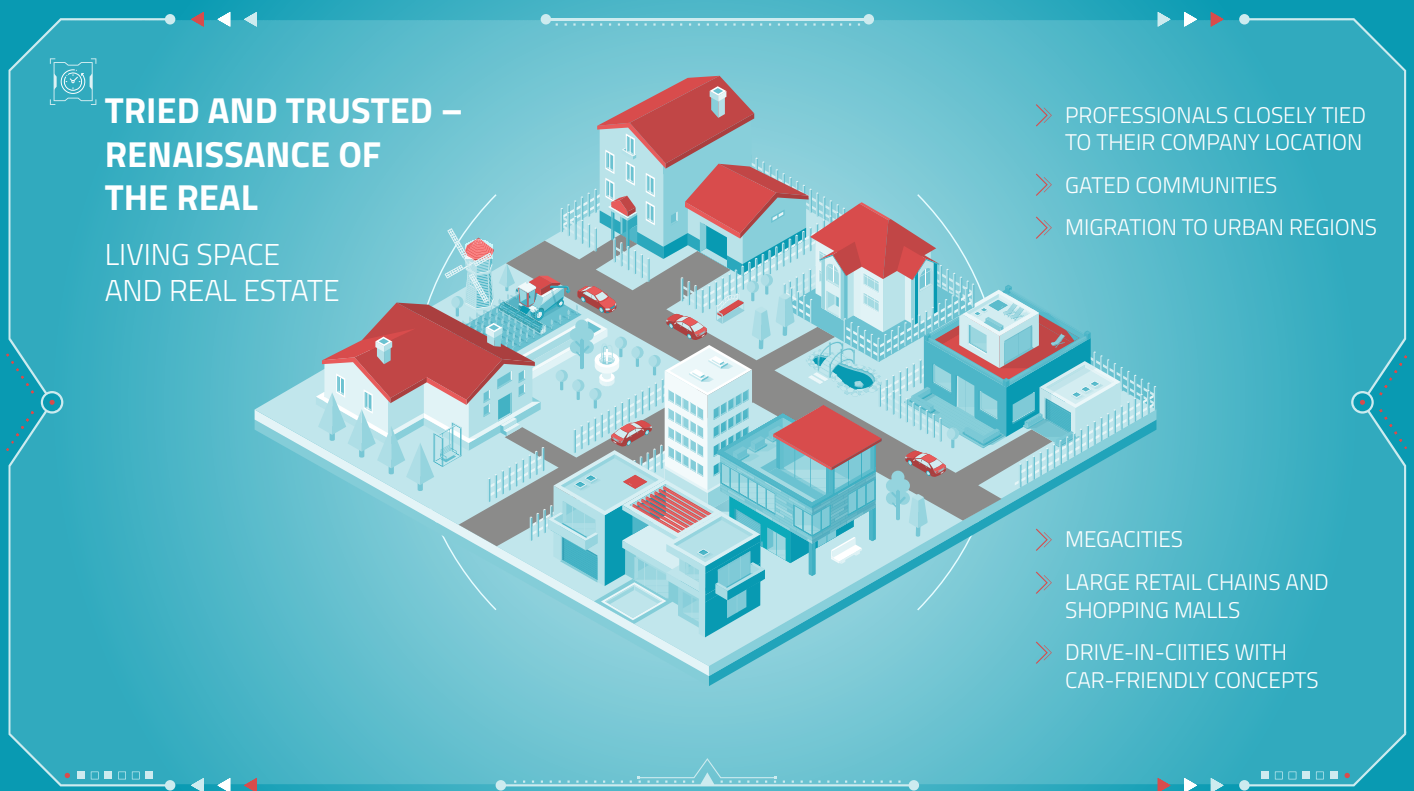SHOPPING MALLS

> DRIVE-IN-CIITIES WITH
CAR-FRIENDLY CONCEPTS

Fig. 2: The immediate neighbourhood as the centre of life: representation of the living space in the scenario "Tried and trusted - renaissance of the real".

3.1 Scenario description

3.1.1 Living space and real estate

The return to well-tried patterns and classic lifestyles, such as maintaining the geographical proximity of workplace and residence, also affects the future of urban and neighbourhood planning. As people in all industries work less from home after the pandemic an, in general, return to the office, they are once again more closely tied to the location of their company in order to manage the daily commute. Urban residential areas remain attractive residential locations in this scenario. Particularly the suburban belts of large cities are growing and in certain regions merging with rural areas. Here, more and more isolated "gated communities" are being formed, i.e. local residential complexes that enable people to live in a secure, specially defined, and controlled society with similar interests and ideas about life. "Bubble thinking" is on the rise. The individual "tribes" of the gated communities have hardly any contact with each other, if at all. This increases the gap between social classes, which leads to a progressive division of society and the emergence of parallel societies.

A trend towards megacities emerges while the desire for rural bliss displayed by urban dwellers during the pandemic, with romanticising ideas and the urge for self-sufficiency, is increasingly on the decline. The dynamics reverse once again, with immigration to urban regions increasing and migration from urban areas to the countryside rapidly decreasing. Peripheral and especially rural areas face great challenges in maintaining a basic infrastructure. Many rural settlement structures dissolve completely. They are being replaced by outsourced industrial sites for food production to supply the megacities (e. g. meat production). A focus on the national domestic market combined with the expansion of independent, controllable production chains promotes this development. In addition to the emergence of industrial locations, other peripheral locations that are close to nature are being transformed into regional tourist hotspots that are in high demand nationally. Due to the increasing need for security, domestic holidays are on the rise. At the same time, people living in megacities long for holiday destinations close to nature. This combination triggers the development of regional and clearly defined holiday areas. The popularity of holiday parks in an artificially created recreational landscape is growing. At the same time, natural areas disappear due to the enormous pressure created by the need for touristic recreational facilities.

In general, society strives for a well-planned, controlled environment with the lowest possible risk of unpredictable developments. Concerns existing within society are also noticeable in the design of city centres. Stationary retail is gaining momentum after the pandemic, aided by considerable state subsidies. Online retail remains an add-on solution as a safety anchor for use in the event of possible new pandemics. Consumption is one of society's essential leisure activities. Large retail chains and shopping centres remain the main design element of city centres. The concept of "drive-in cities", designed to create a car-friendly environment with the possibility of quick and easy consumption, is booming. Land is allocated on the basis of a strict land-use plan that leaves hardly any room for experimental or random developments. Participation processes in urban planning are on the decline and planning happens top-down. This approach as well as high rents and stringent regulations have a negative impact on innovation and the formation of creative clusters in urban spaces. The high pressure on sought-after city centre locations leads to decreasing opportunities for start-ups within city centres.

**TRIED AND TRUSTED –
RENAISSANCE OF
THE REAL**

SOCIAL AND POLITICAL
CHARACTERISTICS

> STAY WITH
TRADITIONAL VALUES

> FOCUS ON NATIONAL
DEVELOPMENT

> STRENGTHENED
REGIONAL MARKET

> PRODUCTION PROCESSES
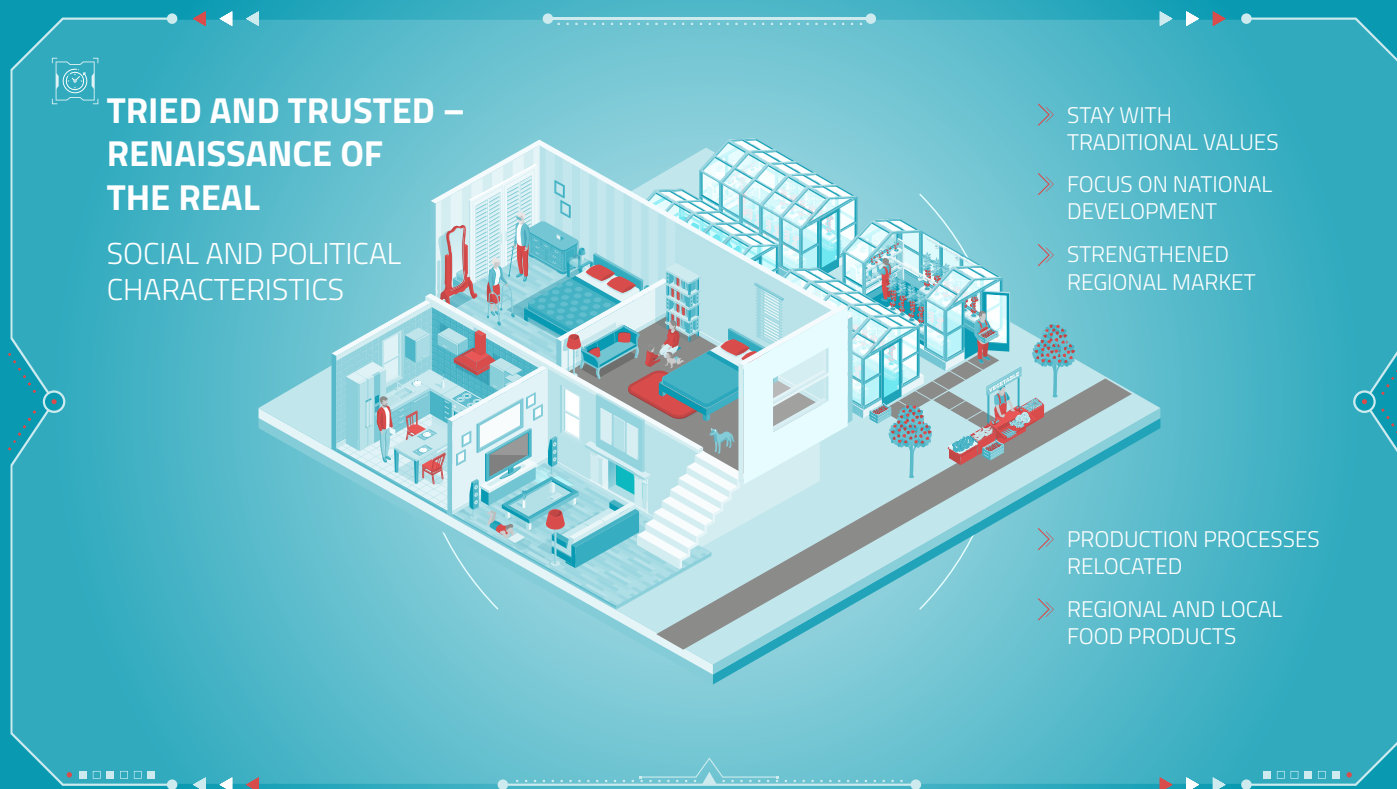RELOCATED

> REGIONAL AND LOCAL
FOOD PRODUCTS

*Fig. 3: Traditional values and regional relations: representation of the social and
political characteristics in the scenario "Tried and trusted - renaissance of the real".*

3.1.2   Social and political characteristics

Societies are increasingly withdrawing from a global world
community to rely on their own national strength. The field of
vision is limited to national instead of international develop-
ments. Regional markets are strengthened and production
processes are, if possible, completely relocated back, with the
aim of gaining a new independence and resilience in supply
chains. The return to familiar, secure, and controllable patterns
can be observed in political decisions on a large scale as well as
in the choice of lifestyle on a small scale. Security and belon-
ging to a group are the most important basic values. Diversity
plays a subordinate role in society. Instead, the focus is on the
power of national communities with clear, uniform structures
and not on ful-filling individual needs on a broad scale.

Traditional values determine social interactions as well as indi-
vidual behaviour. While there is again a willingness to travel for
business, people are reluctant to accept the associated security
risk in their private life, which takes place right on one's own
doorstep. Holiday trips concentrate on regional destinations
with a focus on the best possible recreation.

Food trends revolve around using regional and local produce
with a strong sense of place and tradition. Instead of avoca-
dos and chia seeds, apples and flax seeds are being used. As
a result, seasonal products become more important. People
also focus on traditional and rediscovered varieties, processing
practices and handicrafts. Restaurant visits are the exception
in everyday life and only happen if restaurants have appropria-
te hygiene and safety concepts. Alternatively, everyday life is
organised around numerous private celebrations in a personal,
controllable environment. All in all, life "shrinks" and becomes
more small-scale, with clear references to boundaries, which,
however, do not serve as a limitation, but primarily as a delibe-
rate precautionary measure.

TRIED AND TRUSTED –
RENAISSANCE OF
THE REAL

OFFICE AND
WORKING
ENVIRONMENT

STABLE ORGANIZATIONAL
STRUCTURES

OBLIGATION TO BE
PRESENT INCREASES

CORPORATE CULTURE
CHARACTERIZED AS STABLE
AND STEADY RELIABILITY

REGULATED WORKING HOURS
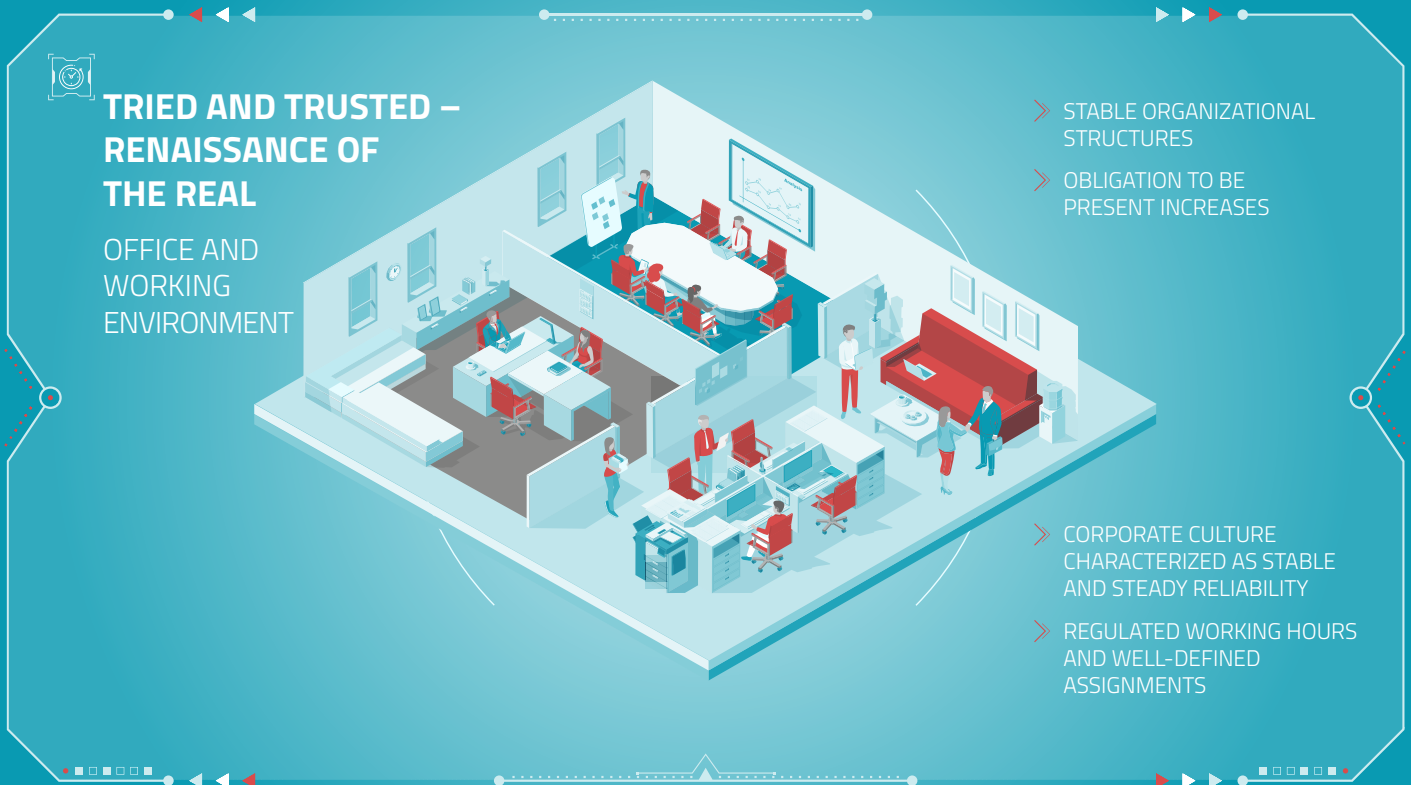AND WELL-DEFINED
ASSIGNMENTS

Fig. 4: Stable work organisations and working in office spaces: depiction of the office and working world in the scenario "Tried and trusted - renaissance of the real".

3.1.3   Office and working environment

Office and work are mainly characterised by stable organi-sational structures. There are clear working time regulations with precise specifications where, when, and how work should be done. The degree of flexibility decreases compared to the pandemic situation, regardless of industry sector and other circumstances. After the pandemic, the obligation to work on-site increases in many companies as they are critical of the concept of mobile working in different spaces and the combination of office and working from home days due to the lack of employee control. Overall, the proportion of people working from home averages at 20 percent. There are also no governmental policy measures to establish a right to working from home but advocacy of clear boundaries between work and private life in order to protect employees from too much pressure. Working in coworking spaces as well as the combi-nation of work and holidays (workation) hardly figure. The return to offices increases the demand for office properties in central locations that are easy to get to. New buildings are being constructed at an extreme speed, mostly in homoge-neous neighbourhoods without mixed-use concepts. Due to

the seemingly slow progress of climate change in Germany and Europe, awareness of the finite nature of resources decreases. The use of sharing concepts, such as desk sharing, is therefore not considered necessary.

Time at work is used to fulfil predefined tasks in order to use capacities as effectively as possible. Agile forms of working and freedom to develop new solutions in creative processes are of little importance in everyday working life. Corporate culture follows a dop-down approach, which increases security and control in companies but at the same time leads to a decrease in innovation. Due to the general desire in society for a high degree of security in one's private and professional life, fewer and fewer professionals opt for self-employment. Instead, they rely on already established structures of large compa-nies with a recognised resistance to crises. In addition to the decreasing number of new companies being founded, many employees' loyalty to their chosen company increases. Even younger generations increasingly decide to stay in an organi-sation if they can identify with the values of their company. The decreasing dynamism in organisations leads to family-like and close relationship within one's circle of colleagues. At the

same time, employees are less willing to change. As companies prefer in-person to remote, business trips also significantly increase after the pandemic and there is a demand for real physical encounters with business contacts. Employees like to travel by company car. In order to make the best possible use of working time, there is an increasing demand for autonomous vehicles, whose use has been approved nationwide and which are very well accepted by a car-loving society. Business trips take place according to traditional patterns, i.e., short trips, sometimes lasting one to a few day(s), with a clear separation of professional and private interests. As an alternative to cars, domestic and international short flights are increasingly being used again. The subjectively perceived added value of face-to-face exchange to boost trust in business relationships outweighs the time and economic commitment as well as the high CO_2 emissions.

3.2 Application to business events

3.2.1 Venues/Destinations

With the return to the "good old days" characterised by classic face-to-face events, central, large event spaces are still in demand. In some cases, multi-complex buildings are being built with several functional modules (e. g., hotel, service facilities such as hairdressers and food outlets). The general scepticism about anything that is new leads to a concentration on the strengthening of business locations and few transformation processes with regard to linking city centres with events.

Good transport connections to both public and private transport means remain an important factor and decisive for user-friendly and uncomplicated travel in the context of attending events. Venues are primarily designed to accommodate as many attendees as possible in the space available. The design of individual rooms is characterised by classic space concepts, e. g. café/lounge layouts. However, central presentation areas with rows of seating and a stage are also integrated in event venues. Even if the concept follows clear and familiar structures, there must be no lack of contemporary upmarket design as attendees demand high-quality furnishings.

Special areas for "club members" and personal work or recreation spaces also become increasingly important for people. Room structures are predefined and templates exist for the event-related furnishing of venues, which can be applied to the respective requirements of organisers. Due to a focus on existing structures and the tried and tested, there is no individual scope for letting attendees participate in how event venue spaces are laid out.

3.2.2 Event formats

Classic event formats shape future events, with both organisers and attendees demanding the familiar classic presentation styles with high information content. This scenario is characterised by a rapid return to high economic performance of events based on known and proven formats. The focus here is on improving conventional formats, while developing something new and unknown is not important and does not find favour.

Interactive formats and creative workshops with experimental character are used selectively and for specific target groups and subject areas. From event concept to implementation and evaluation, everything follows clear structures and guidelines. The general set-up is tightly structured, and a precise time-table is set. Uniform, precise communication and provision of all information is the basis of these event formats as clear structures give organisers, planners and attendees a feeling of security and control.

Event formats are characterised by a high and steadily increasing proportion of networking and break times, as face-to-face interaction with others is the highest priority for attendees who celebrate these encounters. The entire event concept promotes this and places meeting others in the focus of events. In order to be able to guarantee a well-structured and orderly planning, there are few opportunities for attendees to participate in putting together the event programme. Neither organisers nor attendees consider this kind of dialogue prior to events necessary. At the same time, attendees demand a first-class and service-oriented approach. All in all, event design relies on familiar patterns with predictable output for everyone involved.

3.2.3 Technologies

Just like before the pandemic, events take place almost exclusively in physical spaces. As a result, only few virtual events are being offered and hybrid events are the exception. In-person events, even more than before, revolve around emotional and personal experiences. Digital tools on-site are therefore used if they enhance the experience and support face-to-face exchange. Compared to digital only or hybrid formats, far less tech equipment and accordingly less know-how is required.

Nevertheless, technical progress is still required, and technology is needed to make events saver, e. g., with tracking systems, facial, voice or motion recognition, and to regain trust in physical events. In this area, attendees are also increasingly willing to accept their personal data being used as well as the use of big data if digital tools serve event security, e. g., predictive policing. However, the use of digital tools at events is limited to these purposes.

3.2.4   Skills profiles

With the return to proven and familiar structures, virtual events become less important. For event organisers, this means that the need for digital skills to prepare, plan and run virtual and hybrid events is on the decline, while physical events and their optimisation are focused on, with corresponding skills profiles. Ensuring attendee satisfaction becomes key. Therefore, more data scientists are needed to be able to respond individually to attendee wishes on-site. Providing an exclusive and sophisticated service at events takes on the highest importance. This in turn requires customer-oriented staff who are present at events and have good networking skills. Soft skills such as empathy, passion and a basic understanding of customer concerns form the basis of the skills profiles. Being strongly attached to one's own company is crucial and is perceived as a central element.

All-round managers with a 360-degree view are needed to manage the central, multi-complex venues and to combine the different needs of the users (centre managers). With regard to specific additional training and honing skills, not a lot is needed, as event organisers mainly focus on planning and running well-known conventional types of events. Efficiency and effectiveness can be quickly increased through clear structures and organisational procedures. This development is mainly due to the already known and long-tested procedures and patterns. Trainees and new employees can be onboarded quickly with little training as processes are standardised.
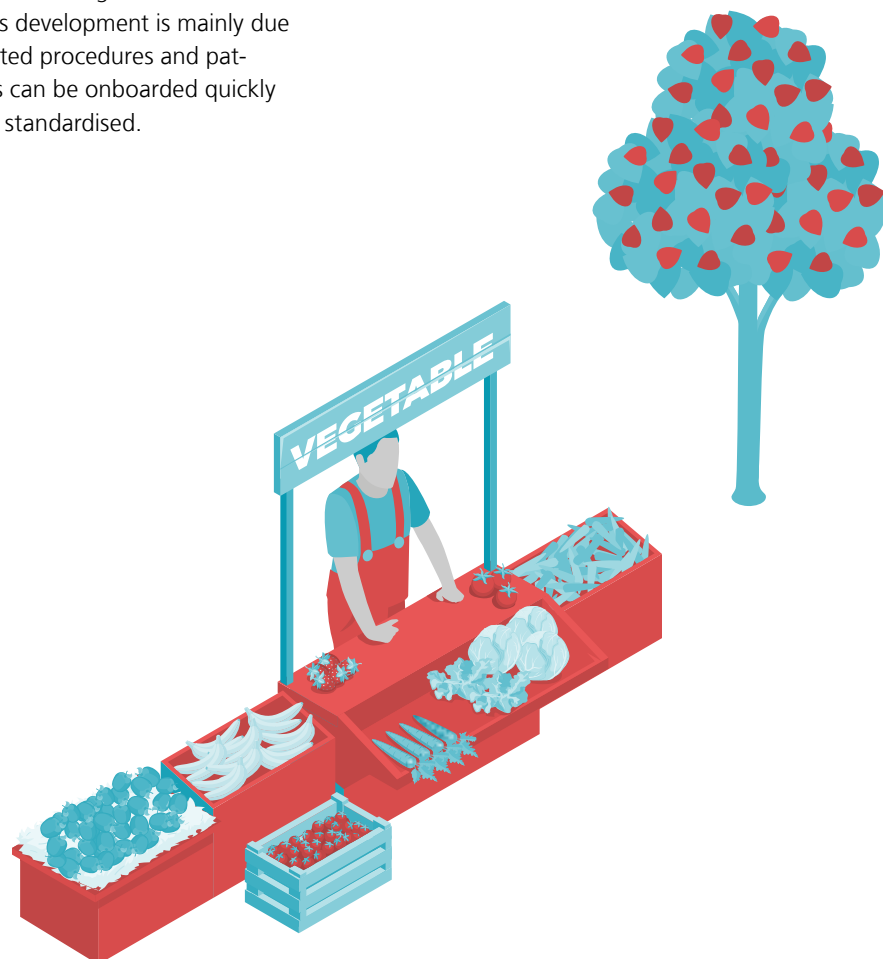
3.3 Definition of recommended actions

3.3.1 Organisers (companies, associations, agencies)

Organisers whose future events are based on proven event concepts should strive for and maintain fixed structures and clear hierarchies within their organisational structure for the sake of security and stability. Due to the longterm commitment of employees to a company, internal regular training is important to acquire new know-how. Structurally, organisers very much rely on cooperation and partnerships within their organisation. They focus on cooperating with luxury hotels, resorts, and business clubs to make events more upmarket. In addition, event organisers cooperate more with climate experts and specialists for risk assessment in order to ensure higher safety standards.

To ensure the best possible and efficient work, organisers focus on new job profiles. Well trained allround talents who are responsible for a personal one-to-one support of clients and projects are essential for maintaining their internal organisational structure. The upmarket standard of what is being offered needs to be constantly improved and modified, which is why lifestyle researchers become important. In the future, agency or event organiser teams should get support from IT specialists/data analysts for better customer insights and understanding and to develop individual, select offers. In addi-tion, social safety experts who assess risks and dangers and advise on preventive measures and the use of technologies are needed.

Agency employees work at their employer's offices and not in different locations and on international projects. Organisers limit their scope to regional events near where they are.

The range of products and services is characterised by a select, unique offer for the customer base with an allround service from planning to marketing (sponsoring) to running events (catering, attendee management, social media, etc.). This full-service offer requires staff (generalists) at the respective event venues. Security concepts based on digital tools are being expanded in order to deal with personal data in accordance with regulations and to ensure the safety of guests on-site. Event organisers also focus on comprehensive lifestyle research in order to better cluster their target group and ultimately cover their needs. This goes hand in hand with the improved analysis of customer data. Data analysis is another important aspect that event organisers need to focus on.

These new requirements also result in future challenges for both agencies and event organisers, including talent acquisition as well as knowledge generation and preservation, which need to be managed within the organisation.

3.3.2 Service and infrastructure providers

Service and infrastructure providers work with fixed structures and clear hierarchies to ensure security and stability. Their structure revolves around longterm employee retention, fostering innovation and stable structures which allow for the internal generation of knowledge. They focus on cooperating with partners and networking with luxury brands, resorts, clubs, retail real estate and leisure parks as well as with art experts and event agencies. In addition to working together, service and infrastructure providers aim for close ties with these partners.

Within organisations, so-called 360-degree managers are needed who are comfortable with supporting as well as managing event venues and their functionalities. This job role is complemented by IT specialists/data analysts for better customer understanding and the development of a cognitive, adaptable environment. Integrating a personalised robot to guarantee a high quality of service and individual attention can give service and infrastructure providers a decisive advantage when it comes to providing the expected upmarket service.

Similar to event organisers, service and infrastructure providers do not work on projects in different locations and on international projects but concentrate on local assignments that follow clear and fixed guidelines. They focus on the development of integrated concepts for spaces with a variety of services (e. g., overnight accommodation, wellness offers, food and drink) for holistic event concepts. Attendees demand 24/7 service and individually adapted environments with a high degree of exclusivity.

Service and infrastructure providers focus on various fields of investment, including space concepts that contribute to the development of multifunctional locations, the detailed development of security concepts for attendees on-site and select and personalised interior designs.

The development of new and suitable concepts for spaces to enable multi-complex set-ups with a variety of infrastructures and services is seen as particularly challenging. Developing comprehensive security concepts that cover all phases of an event, from arrival (check-in) to departure (check-out) are another future challenge, which requires constant adaptation to changing needs.

3.3.3 Destination marketing organisations (DMOs)

Despite a return to familiar, tried, and tested event formats, DMOs face new challenges. As is the case with the stakeholders discussed above, their organisational structure is characterised by stable structures and routine work processes. Internal support to stimulate knowledge generation is necessary to inspire employees and generate small-scale innovations.

As events usually take place in rather isolated "bubbles", it is particularly important for DMOs to cooperate both with event organisers and service and infrastructure providers in order to be informed about current events and to develop corresponding concepts for their cities. At the same time, they provide ideas to introduce and actively shape new marketing topics. With regard to new job roles needed to implement events, event supervisors complement the skills profile of DMOs. These professionals are always up to date on which events are currently taking place in which event venue and analyse the needs of the respective attendees in order to create a corresponding tourism profile for their cities. So-called "city-event matchmakers" liaise between event venues and municipal authorities. DMOs also need a smart city expert team, which develops integrated smart city strategies with a special focus on increased security through predictive policing.

As events hardly take place in city centres, but in decentralised, out of town areas, a mobility network for easy travel to city centres needs to be developed to take advantage of economic benefits (business travellers as tourists). This task is taken on by DMOs. In order to meet the high demands of business travellers/tourists, cities work to provide more upmarket offers (retail, restaurants, top cultural offerings, etc.) in order to attract attendees to the city centre after events.

General investments for creating sustainable locations include mobility concepts for the integration of a holistic, user-friendly mobility chain as well as security concepts with the help of smart technologies. The focus is also on the expansion of upmarket areas with high-quality service offerings. Setting up the aforementioned interface between event venues and municipal authorities, which is especially complex both from an organisational and staff perspective, is a particular challenge for DMOs.
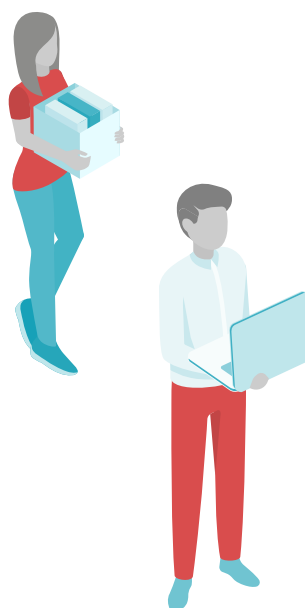
4. Scenario 2: "Diverse and flexible – the global community"

"The pandemic is seen as an opportunity to build the future in a different way. Social and political systems are questioned. Global action and flexible structures become new guidelines. Overall, lifestyles become very diverse. Political systems as well as corporate organisations are increasingly based on having sole responsibility for their actions. Everyday working life is characterised by a high degree of flexibility and remote work is becoming the new standard. Events serve as a ground for *experimentation to try out new, innovative concepts. Attendees are integrated into the planning process in which they actively participate and are given scope for real involvement. The high proportion of hybrid and virtual events enables strong global networking and featuring international speakers at almost all events."*

DIVERSE AND FLEXIBLE – THE GLOBAL COMMUNITY

LIVING SPACE
AND REAL ESTATE

> CHANGING COMPREHENSIVELY
> SOCIETY LIVES IN DENSELY POPULATED URBAN CENTERS

> MELTING POTS WITH DIVERSE CULTURES
> CREATIVITY AND INNOVATION ON THE RISE

Fig. 5: Creative knowledge clusters and highly dynamic: representation of the living space in the scenario "Diverse and flexible - the global community".

4.1   Scenario description

4.1.1   Living space and real estate

After the pandemic, social values, our living space and how people live change considerably. Old patterns are being questioned and new ones are being developed for the future. This social change also significantly impacts on our living space and real estate, both in a private and professional context. The majority of people live in densely populated urban centres and megacities with a population of more than 10 million people are on the rise, not only in Asia but also in Central Europe. Urban areas are perceived as valuable knowledge clusters. Melting pots with diverse cultures, different lifestyles and strong social diversity emerge. Cities become hugely dynamic places based on diverse co-existing cultures and people openly sharing their personal know-how. As a result, these urban centres see a rise in creativity and innovation. This phenomenon of creative cities is also driven by a young, increasingly mobile generation. Often, members of this generation stay in a certain place for only a few months and then move on because of work or education. Classic structures as they applied to the spaces we live in are being shaken up. Instead of emphasising national borders, a global network between individual cities develops, with cities as the political centres of the future.

Cities are seen as places where knowledge is traded and hence, redesigned accordingly. New concepts for sustainable and lively city centres revolve around the preservation of open spaces for experimental retail or cultural offerings where new ideas can be implemented. City centres have long since ceased to be the home of stationary retail with large retail chains as their dominating feature. During the pandemic, online shopping has increased considerably across generations and this trend continues even after restrictions have been lifted. As a consequence, city centres change, with new concepts being tested to preserve their vibrancy and boost their authenticity. Temporary events and restaurants with event character become prevalent. Pop-up locations for shops selling regional products and for start-ups to experiment encourage residents and visitors alike to regularly discover city centres anew. Urban factories and workshops become an integral part of city centres to meet society's demands for transparent manufacturing and production processes with people critically considering their own consumption. At the same time, they also have a show or entertainment character providing emotional experiences that differentiate spending time in city centres to simply online shopping. The city becomes a stage for special experiences and encounters. In addition to new retail concepts, consumption-free places emerge, e. g., community areas, which are particularly important considering the high cultural

diversity in order to create new relationships in urban societies and prevent social bubbles that exist next to each other in silos. As the population is permanently on the move with corresponding unclear social structures, experimental areas with fewer regulations rise and different lifestyles and cultures coexist, which means that the need for security concepts also increases. Due to permanent change and a close-knit, globally networked society, the risk of new pandemics as well as violence and crime increase.

In general, the urban structure evolves from clearly separated areas such as residential quarters and industrial sites to mixed-use quarters with a variety of functions. Due to a rising number of single households, the demand for small flats also increases. In addition, many people prefer furnished flats with allround services and short tenancy agreements to support their nomadic lifestyle. As people no longer feel a sense of home and deep attachment to a place but have a new urge for freedom, the sense of responsibility for one's own neighbourhood declines. At the same time, smart infrastructures becomes all the more important. Tools enabling people to navigate to points of interests and apps for easy networking with locals become increasingly relevant and are an integral part of everyday life.

DIVERSE AND FLEXIBLE – THE GLOBAL COMMUNITY

SOCIAL AND POLITICAL CHARACTERISTICS

- DECISIONS: INTERNATIONAL CONTEXT
- DIVERSITY AS GREAT POTENTIAL
- DIFFERENT LIFESTYLES ON THE RISE
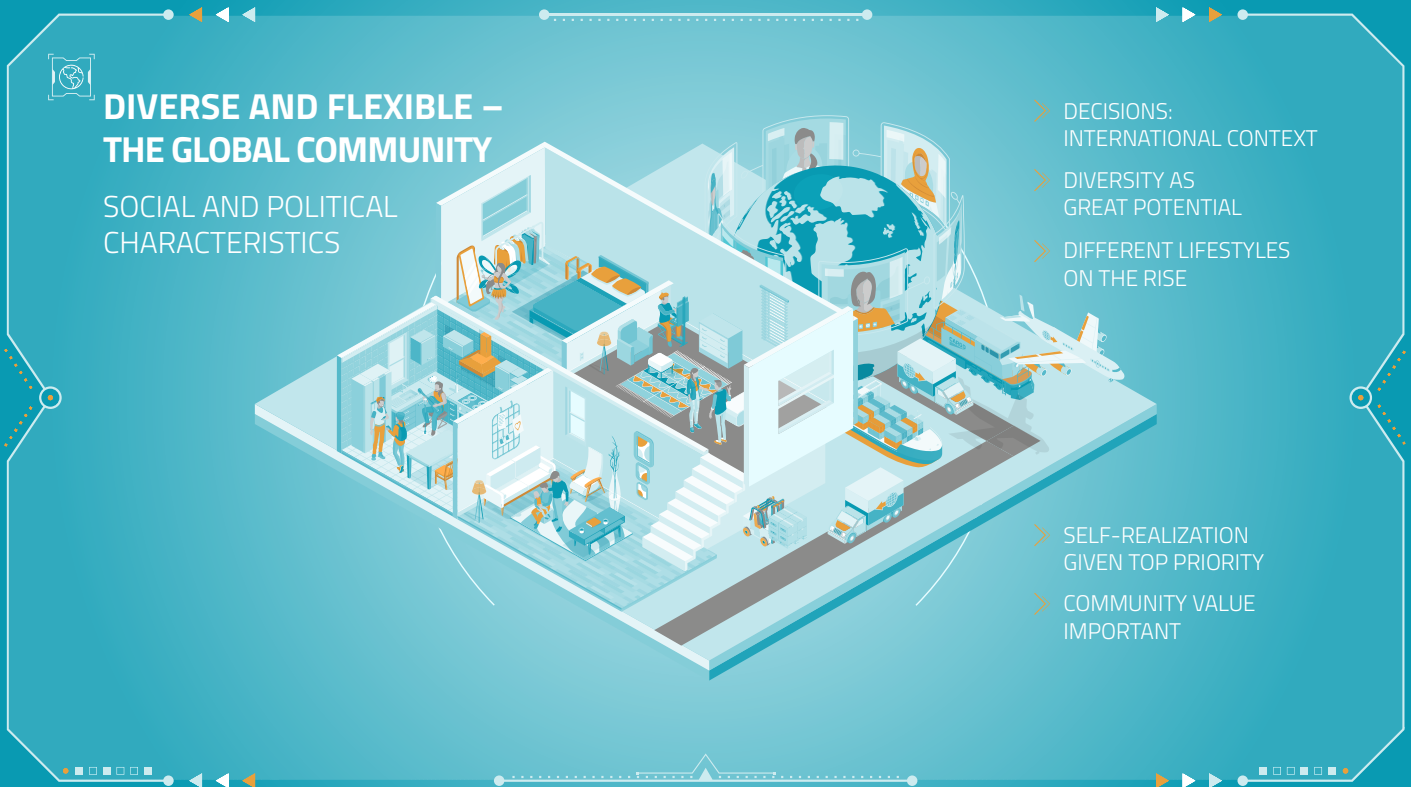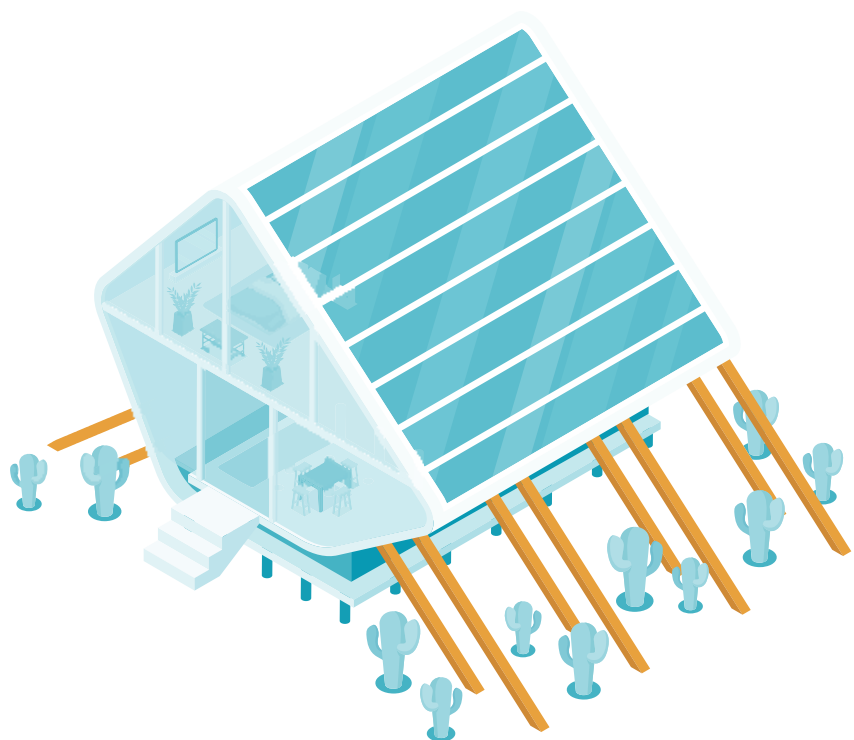- SELF-REALIZATION GIVEN TOP PRIORITY
- COMMUNITY VALUE IMPORTANT

Fig. 6: Diverse lifestyles in a global community: illustration of the social and political characteristics in the scenario "Diverse and flexible - the global community".

4.1.2   Social and political characteristics

Society is growing ever closer together across borders. People generally no longer see themselves as belonging to one nation only, but as global citizens. This global community is perceived as the most powerful asset to address future issues and build a sustainable and resilient environment. Nations are no longer the most important organisational unit. Globalisation creates a completely new international community, which is also partially overriding national political systems. Instead of organisations limited to one country onlytransnational units with supranational actors are emerging, which increasingly focus on specific priority topics with respective expert units being connected in a global network. More and more decisions regarding the economy, education, security, climate protection, digitalisation or health are being made in an international context. The Covid-19 pandemic has highlighted the need for action as a global community in order to master challenges in the long term and to jointly develop ways of solving problems. Political decisions also focus on the idea of individuals acting independently and in a self-reliant manner. State regulations decrease while at the same time a society where people take responsibility for themselves is promoted.

Alongside the power of a global community, diversity is considered to have great potential. Young generations in particular come into contact with other cultures and different value systems and ways of life during their education, with international exchange programmes and international internships. When they (potentially) return to their home countries, they still consider a diverse society to be important for stability and resilience. People become more tolerance towards different ways of life. The experimental approach described with regard to urban planning is also characteristic for individual ways of life. Individual fulfilment comes first while traditional values are questioned. Never-theless, community is considered an important value despite independence and freedom with regard to where people live. Communities are being formed anew and thought of differently. Coming together at short notice is an important element, which is supported primarily by smart digital tools, such as apps for networking with people with similar interest profiles (persons of interest).

All the different lifestyles have in common that they are extremely mobile and dynamic. Living in several places becomes the new standard. Many change where they live depending on the season or they move to other countries for good. This lifestyle also has an impact on leisure activities and friendships: Commitment to, e. g., sports clubs or other institutions that bring a certain stability and social commitment, decreases rapidly. Networks are created over long distances and social interactions are no longer bound to geographic boundaries so that neighbourhood relationships in the current place of residence partly disappear. In addition to the focus on self-fulfilment and personal development, the geographical freedom and the range of choices also increase the danger of an imbalance between the "I" and "we", combined with unwanted isolation and loneliness despite global networking. To counteract this, new concepts for temporary, free communities emerge and apps for "social dining" become hugely popular to connect individuals through coming together for joint meals.

**DIVERSE AND FLEXIBLE –
THE GLOBAL COMMUNITY**

OFFICE AND WORKING
ENVIRONMENT

- REMOTE WORK BECOMES
  THE NEW NORM
- HEALTHY WORK-LIFE
  BLENDING

- 30-HOUR WEEK
- MULTIFUNCTIONAL AND
  DIVERS OFFICE LANDSCAPES
- RARER RUSH HOUR TIMES,
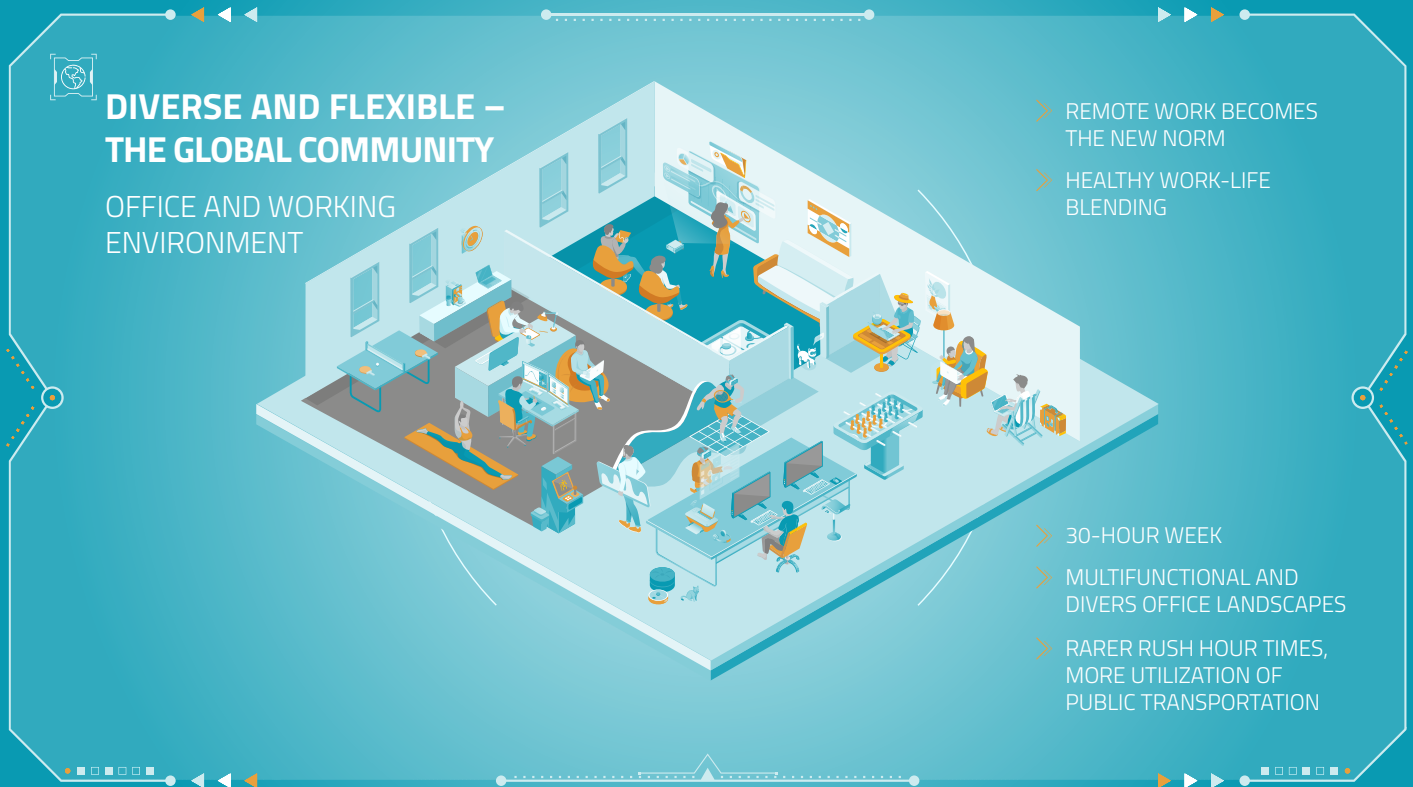 MORE UTILIZATION OF
  PUBLIC TRANSPORTATION

*Fig. 7: Remote working as the standard: representation of the office and
working world in the scenario "Diverse and flexible - the global community".*

## 4.1.3   Office and working environment

The Covid-19 pandemic changes the office and working world
for good, with remote working becoming the new standard.
Based on the positive experiences made during the pandemic,
office, and knowledge workers in particular will have a lot of
freedom and choice in the future as to where, when, and how
they want to go about their work. Regardless of sector, the
proportion of people working from home remains extremely
high even after the pandemic. As a result, the boundaries
between professional and private life increasingly disappe-
ar. People look for new everyday structures and a healthy
work-life blend. For more and more employees, the 30-hour
week becomes the norm. Due to the use of digital commu-
nication platforms and filing systems, work is no longer tied
to a specific location but becomes detached from company
locations. This development allows for the establishment of
new functional modules, such as the increasing consideration
of neighbourhood offices when planning new residential
quarters. Conventional office space, on the other hand, is in
some cases considerably reduced. The classic structure with
offices for one or two employees gives way to multifunctional

and diverse office layouts with meeting and communication
areas. In some cases, companies completely detach themselves
from their fixed locations and rent temporary project spaces
in coworking outlets or event venues as needed. In addition,
the "workation" phenomenon combining work and recreation
at holiday destinations becomes more popular. The tourism
industry reacts and all-inclusive offers with coworking space
use, after-work entertainment and guaranteed stable Wi-Fi
emerge.

The newly flexible office and working world not only influen-
ces how everyday life is organised, but also affects other areas,
such as mobility and the daily commute. Rush hour times
become less of an issue as the use of public transport is more
evenly spread out over the day when people make individu-
al choices about where they want to work. In addition, the
neighbourhoods where people live become more important
as more people work from home. Urban and neighbourhood
planning as well as mobility concepts will be analysed and
adapted to the new conditions and requirements.

Global networking also matters in the office and working environment and new complex networks of professionals at different locations emerge. The proportion of project work increases significantly. Instead of working with the same stable team over long periods of time, teams are usually put together for short periods of time only. The agile and international way of working means that people are confronted with a wide variety of work cultures and sometimes divergent values. Putting aside prejudices against the unknown, promoting a sense of community despite heterogeneity and misunderstandings, and the need for cultural understanding require new skills profiles, especially among managers.

When choosing a job, purpose is particularly important. Young generations specifically choose companies that match their passions and deal with topics whom they personally consider important. The longing for freedom of choice not only concerns the place of work and working hours, but also the content of work. In return, people are once again willing to take risks and break free from secure networks. Combined with an increasing tolerance for mistakes in society, there is a strong growth in the number of start-ups. For many, the path to self-employment is a good alternative to large companies in order to exploit their personal potential and stand up for their own meaningful activities that correspond to their individual interests.
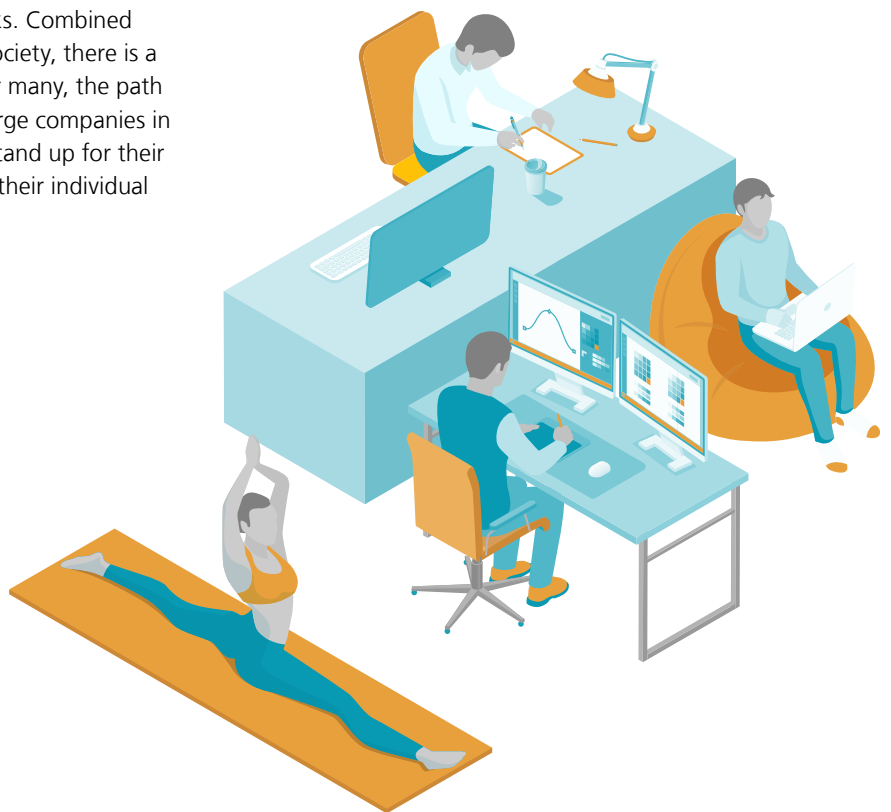
4.2 Application to business events

4.2.1 Venues/Destinations

The high degree of flexibility in terms of time and space, especially in the office and working world, also creates new possibilities for events. Attendees have more freedom how they organise their working day. In addition, the possibilities for global networking continue to increase boosted by new digital innovations. Event attendance is planned and realised in a variety of ways. In general, events are no longer bound to one place as taking part digitally is easily possible. As location and time do not create any restrictions anymore, worldwide cooperations between venues emerge. Multi-site events are becoming a mass phenomenon and enable a borderless transfer of knowledge.

The demand for large, isolated event venues decreases. As people can attend virtually, smaller venues close to city centres that are integrated into urban life are of more interest. The use of existing spaces and the integration of event space in, e.g., commercially used areas in city centres continues to increase. These multifunctional venues allow for a more efficient and sustainable use of spaces. However, as they are integrated in existing buildings, they sometimes only have limited capacity (e.g. small cafés, libraries). In addition, new pop-up venues develop both in existing structures and in specific temporary spaces in public places. The emergence of mixed-use districts in city centres makes inner cities more attractive and opens up new perspectives for the development of places where people meet instead of just consume. More and more flagship projects featuring temporary events emerge and contribute to the revitalisation of city centres.

Overall, the competitive pressure between event venues increases. In the long term, mainly unique, authentic spaces are successful. Authenticity is primarily achieved through a connection with the existing, historically grown surroundings, which requires close cooperation with DMOs.

4.2.2 Event formats

The pandemic has changed the way we communicate in the office and at work as well as in our private lives and at events. Virtual platforms become established means of communication. Attending events in person is based on very deliberate decisions that are made for each individual occasion. When people decide to attend events in person, meeting others face-to-face and communicating with other attendees is their highest priority. Experiences made during the pandemic show that information transfer through talks and presentations by speakers works well virtually, however, networking and sharing emotional experiences is very much limited in the digital space. As a result, socialising becomes the most important reason for attending events.

When choosing a suitable event format, the focus is on promoting emotional experiences and networking among attendees. The information content provided at physical and hybrid events decreases, while interaction increases. Instead of achieving knowledge transfer through talks and presentation, organisers concentrate on letting attendees make their own topic-related experiences and participate. Playful elements complement classic formats, and often there is no set agenda before the event begins. Event programmes leave room for spontaneous, unplanned moments, which is something that cannot be reproduced virtually but offers great added value with respect to developing innovative ideas. If there is nevertheless a rough schedule, it contains "community times" to provide additional opportunities for networking.

In order to make event attendance as easy as possible, new modular workshop formats are being developed that can be put together in different ways according to personal interest, attendee expectations and the desired result. As people thus create their own individual event, the degree of participation in the preparation and planning of events is high, which results in bold and innovative concepts.

In general, event formats are also selected according to their topics. Events which take place in more than one place focus on different topics depending on where they are and then bring them together to form a "big picture".

Particularly pop-up events in existing city centre spaces allow for the combination of event content with viewings and personal experience of location-specific attractions, e.g. cooking sessions, DIY courses or tastings. These can be chosen and put together in different ways depending on the location that was chosen and the topic. As a general rule, physical events in particular should be coherent and tell an overall story.

4.2.3   Technologies

Despite the need for face-to-face encounters and shared experiences on-site, attending events virtually is also on the rise after pandemic-related restrictions have been lifted. Events offer different opportunities for virtual and in-person attendance. Virtual communication platforms and digital tools are used as a matter of course at many events and complement design elements in the real analogue world. Hybrid events become standard. Interfaces between the different worlds are being redefined and possibilities found for connecting virtual and physical attendees. In order to support their interaction, it is important to consider the integration of so-called smart surfaces in venues from the start when planning and assessing the set-up of venues. The staging of events in TV or streaming studios remains common. Smart surfaces that are integrated in buildings and the widespread use of VR/AR technologies mean that both virtual and physical attendance in innovative event formats is on an equal level. In addition to the availability of suitable technical equipment in event spaces, venues are also chosen for their digital infrastructure, e.g., the availability of 5G or broadband internet. Venue capacity ceases to be of concern.

Overall, events become more diverse. Attendees can choose between taking part virtually or physically, between multi-site or one site only events, interactive formats with integrated location-specific attractions as well as between "learning lessons" or short "event sprints". The range of offers considerably challenges both attendees and organisers. In order to provide better orientation and reduce the risk of being overwhelmed, event platforms increasingly gain in importance for attendees to get personalised recommendations based on individual preferences. Thus, the platform economy is growing rapidly in the events industry.

Socialising apps are also on the rise. Attending events is increasingly linked with private trips in order to make the most of travel and justify the effort involved. In order to easily find your way round unfamiliar places after the respective event, including restaurants and cultural offers, cities increasingly work with smart tourism concepts. Social connections are also important for attendees. Apps like "Get to know your local" stand for fast and easy networking between resident populations with visitors. As many attendees also work during their extended stays, the availability of work locations in cities becomes more important. Innovative business models for the use of cafés and restaurants as workplaces emerge, e.g. booking time slots to work at various locations with a fictional so-called "working in the city pass".

4.2.4   Skills profiles

Due to the increase in virtual and hybrid events, the need for digital skills grows immensely. Above all, so-called "interface managers" for the design of interfaces between the virtual and real world are in demand. Specialists with AI expertise are also sought as well as VR/AR skills.

Since digital skills cannot be covered by national experts alone, more and more international project-based teams are set up for temporary work on different events. As people with different cultural backgrounds come together in these temporary teams, soft skills are needed in addition to specialised knowhow. A broad understanding of different cultures is a great advantage, as is empathy and the ability to tolerate different ways of working. Teams have to come together at short notice, quickly assign roles and form a stable unit in order to work together as efficiently as possible and to find new, creative ideas for events that are in a state of being disrupted. To further develop a globally networked event community, there is also a need for cultural studies researchers who have a broad knowledge of ethical, moral, and legal principles in different countries and can build a bridge between cultures through educating people accordingly.

Furthermore, soft factors such as flexibility, being able to adapt quickly and organise oneself become the most valuable characteristics when it comes to building a resilient event sector. Professionals should be able to adapt quickly to unknown situations and develop new approaches to solutions, sometimes without a blueprint. These skills are particularly in demand when organising interactive events. High levels of interaction require not only hosting in a classic sense, but also socially trained employees on the one hand and staff from the entertainment sector on the other.

Overall, networking skills gain in importance. Close cooperation with local experts is particularly important in order to keep track of the many new possibilities for event venues in city centres.

4.3 Definition of recommended actions

4.3.1 Organisers (companies, associations, agencies)

The world around us changes with increasing speed. Not only climate change is causing a major shift in society, but also advancing digitalisation and globalisation. As events have to fundamentally reposition and reinvent themselves, organisers are also faced with very different demands. Overall, flexibility in terms of space and time continues to increase. This change demands a new definition of working methods and correspondingly new regulations for teamwork. The high degree of freedom means that people need to work more independently, and different leadership skills are needed, not least because of the increasing project work and forever changing teams. Soft skills such as empathy are also more in demand than ever.

Cooperation and partnerships to develop innovative ideas and solutions for the changing needs of attendees are highly relevant. Agencies are connected worldwide to be able to consider different cultural perspectives and learn from other nations. Conventional marketing strategies are no longer sufficient, especially to fully reach younger generations. Social media becomes the main platform to inform about current events and serves as a platform for building communities around individual events. Therefore, the cooperation with influencers – especially micro influencers – is important as well as working with influencer marketing agencies that support event organisers in identifying suitable individuals. In order to create professional virtual and hybrid events, organisers also closely cooperate with tech start-ups, event platforms, streaming services, and production studios.

The new user requirements and environmental conditions also influence the emergence of new job roles. "Influencer matchmakers" are needed to build a kind of internal influencer database to draw from. As emotional event experiences are key, especially when attending in person, attendees are very keen on authentic venues. "Venue trend scouts" are responsible for researching relevant and out of the ordinary spaces. This requires close cooperation with DMOs. Emotional experiences can also be created through interactive and diverse formats. "Educational entertainers" develop innovative live formats combining playful elements and learning content for small and large groups.

In addition to developing their internal organisation and skills, the range of services and products offered by event organisers also changes. Innovative, modular event and workshop formats with numerous opportunities for involving attendees are particularly relevant. This comes with the development of smart tools for letting attendees independently plan their event agenda (programme configuration). In order to enable the organisation of events within city centre spaces, event agencies also focus on the planning of pop-up events, e. g., interim use of existing buildings that are otherwise not used for events, in close cooperation with DMOs.

Organisers mainly invest in the development of the programme configurators mentioned above. They simplify the integration of participative elements, the use of VR/AR technologies and data analysis tools as well as specific life-style research in order to increase the level of diversity among attendees. Due to the new fast pace of life and constant change, organisers find it particularly challenging to plan with certainty. High innovation cost is another challenge. In addition, the need for agility puts organisers under extreme pressure. Although this pressure triggers innovation, it also leads to organisers being permanently overstrained.

4.3.2 Service and infrastructure providers

Service and infrastructure providers react to the changed conditions with a high flexibility regarding space and time. Everyday work is characterised by numerous, short-cycle projects with different team members. Fixed teams on-site are thus repeatedly broken up and hybrid cooperation increases. Close cooperation with different sectors is particularly important. People exchange ideas with other infrastructure providers not only on a national but also on an international level. As urban structures and the world of events merge, cooperation with city management as well as architecture and urban planning offices becomes more important. Real estate companies are also sought-after partners to rethink event venues. In this context, too, implementing hybrid and virtual events is a major challenge. There is growing interest in collaborating with tech start-ups that overcome silo thinking with new ideas, and service and infrastructure providers deliberately seek closer relationships with the entertainment industry and streaming platforms. Cultural studies experts and sociologist are also increasingly being brought in to better understand cultural differences in a globalised world and to be able to respond to the diverse needs both internally and externally.

In order to get a better overview of the various digital trends and to identify the appropriate tools for each use case, infrastructure and service providers rely on employed "tech trend scouts" who are always up-to-date and follow developments closely. There is close cooperation between tech trend scouts and experts for hybrid events, who are responsible for the professional implementation of hybrid and virtual events. In order to enable emotional event experiences and to give on-site attendees real added value compared to attending virtually, a rethinking of event spaces is necessary.

Venues need to reinvent themselves and have a unique character and atmosphere to promote long-lasting memories. In addition, the requirements for spaces also change due to the new interactive formats. Infrastructure providers employ specialised "innovative design makers" to develop new concepts for spaces that are highly flexible and multi-functional. As the use of alternative event venues increases, e. g., in public city centre spaces, large event centres are increasingly less in demand. Transformation leads support the possible transformation of existing event venues and the integration of temporary use concepts as well as the development of alternative programmes for the spaces in question.

Not only their internal organisational structure changes but also the portfolio of service and infrastructure providers. As events have become independent of large infrastructures, the focus is primarily on finding new temporary options for how to use existing event centres, in some cases completely transforming them. Overall, service and infrastructure providers have a more wide-ranging and diverse offering. In addition, smaller venues are being created mostly in cooperation with municipal bodies (as platform providers) and innovative proposals. Investment focuses on the one hand on the development of new concepts for spaces and on the other hand on supplementing technical equipment with systems that are integrated in spaces and smart surfaces (smart spaces). Further investment concerns new marketing strategies, since pop-up venues and the use of existing structures require direct marketing, unlike dedicated event venues. Due to the many new possibilities of using different spaces as platforms for events, service and infrastructure providers are exposed to high competitive pressure. High innovation costs and a regular, efficient utilisation of spaces are also perceived as major challenges for the future.

4.3.3 Destination marketing organisations (DMOs)

DMOs increasingly see a change in how they work. Many people continue to work from home, hybrid working is becoming the standard and temporary project teams emerge across national borders. Urban institutions form close networks with other cities. Large cities in particular set up stable relationships with each other to boost knowledge transfer. DMOs should be very knowledgeable about what is specific about their location as well as about current changes and innovations so that events can placed in authentic settings. Cooperation with teams of experts on urban history is important to better understand the historical context and roots of places to integrate relevant elements in programmes or to choose catering appropriately.

Administrative bodies provide additional information on neighbourhoods that are trendy at any given moment and are popular with, e. g., start-ups and artists. In this context, it also pays to cooperate with initiatives such as Creative City Network to be informed about the emergence of creative neighbourhoods. In order to better understand their environment and to locate social groups and also as a basis for defining temporarily usable event spaces in city centres, DMOs work with experts in urban and regional sociology. They can improve their understanding of their surroundings when interacting with cities on a social, political, and economic level, which is also an important building block for linking urban development with events.
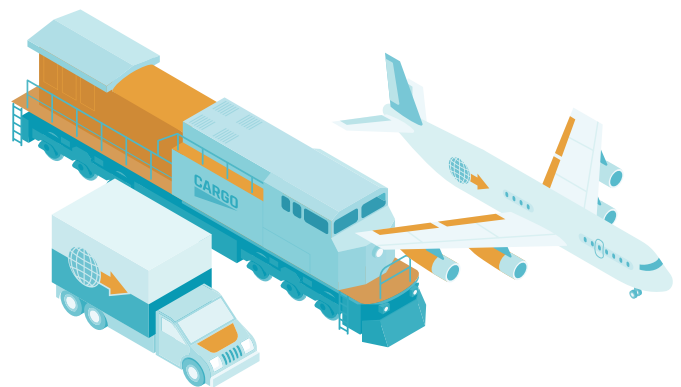
New job roles emerge within DMOs. "City context managers" offer skills in site-specific architectural history. They keep track of existing historical buildings, current interim uses as well as social and cultural trends, and advise event agencies on ideas for using urban structures. "Creative city strategists" have a broad insider know-how of creative bubbles and hotspots of younger generations, alternative nightlife, and neighbourhoods in the process of gentrification, where interim uses can sometimes be facilitated more easily. They know about "unfinished, up-and-coming places" in cities that have a unique atmosphere. Networking professionals who think systematically complement the team of DMOs. They advise on strategy and the integration of events, taking all needs into account.

The new requirements change the range of products and services offered by DMOs. As urban structures are actively considered as potential venues when planning events, the focus is on integrating events in existing buildings (e.g., blueprints for how to transform buildings or for temporary uses). This development makes city centres more attractive, brings economic advantages through the potential of events and promotes international awareness. The development of digital twins for urban, space and regional planning simplifies planning and reduces costs (City Information Modelling). Participative processes take on increasing importance. Not only organisers and attendees want to be involved in the planning processes of events but also the people who live in the respective cities. Real life labs and creative spaces emerge in neighbourhoods that are very suitable for temporary events. This exchange promotes new ideas and creative approaches to solutions. Investment in additional transformation funds supports the development of new business models, uses and technologies. This is an important field of investment as innovation is urgently needed to develop a new, future-oriented and sustainable event industry. The intelligent linking of urban infrastructures to create smart cities is also a top priority for DMOs. The same applies to the development of authentic destinations that identify with their unique surroundings and understand the individual context as an opportunity to focus on accordingly (e.g., be a destination for education and knowledge highly influenced by educational institutions or a city of sports with existing sports facilities, stadiums and a region that has a heritage in sports).

However, a world characterised by ongoing change not only provides opportunities but also comes with challenges and risks. The repeated readjustment to requirements and conditions means both staff and innovation cost. In addition, while new concepts for spaces are developed very quickly, this is not seldomly halted by costly and protracted implementation processes. Bureaucratic administrative structures clash with the agility and flexibility exhibited by advancing first-movers and innovators.

5. Scenario 3: »Green and aware – the net zero society«

"Health awareness and behaving in environmentally friendly ways determine consumer behaviour and political decisions. Climate change causes people to think differently and put personal needs aside. Shared housing and alternative housing concepts with shared communal areas become the new standard. In companies in all sectors and of all sizes, sustainable organisation and production is a top priority. This trend also effects the event industry.

Attendees demand a strict consideration of sustainability aspects throughout every aspect of events with disclosure of the respective CO_2 footprint. The use of regional, seasonal resources and existing infrastructures is key when planning and running events. Existing buildings are being temporarily converted for event purposes. The use of regional products for catering and sustainable transport as well as the use of renewable energies become the new normal."

GREEN AND AWARE – THE NET ZERO SOCIETY

LIVING SPACE AND REAL ESTATE

CLIMATE CHANGE LEADING TO NEW ECOLOGICAL AWARENESS

INTEREST IN ALTERNATIV LIVING COMMUNITIES GROWING

MOVEMENT BETWEEN CITY AND COUNTRYSIDE BALANCING OUT

SUSTAINABLE, ECOLOGIAL CITIES

Fig. 8: Sustainable urban development: representation of the living space in the scenario "Green and aware - the net zero society".

5.1 Scenario description

5.1.1 Living space and real estate

Climate change becomes very obvious for people in Germany and Europe which results in a new ecological awareness within society. The sustainability principle guides all action in economy, politics, and society. Basically, this means that no more should be consumed than can be regrown, regenerated, and made available again. To design sustainable urban structures for the future, healthy, green cities are developed on the basis of a new symbiosis of natural and artificial man-made elements. Instead of natural environments outside town, new ideas are being developed to establish a "green lung" within cities. Green cities are not only meant to mitigate climate change and prevent natural disasters, but also to serve the well-being and health of the population. The new natural environment consists of a variety of different plants. Urban biodiversity increases resilience and provides new space for the settlement of previously displaced species. The city becomes a habitat for animals, humans and nature alike.
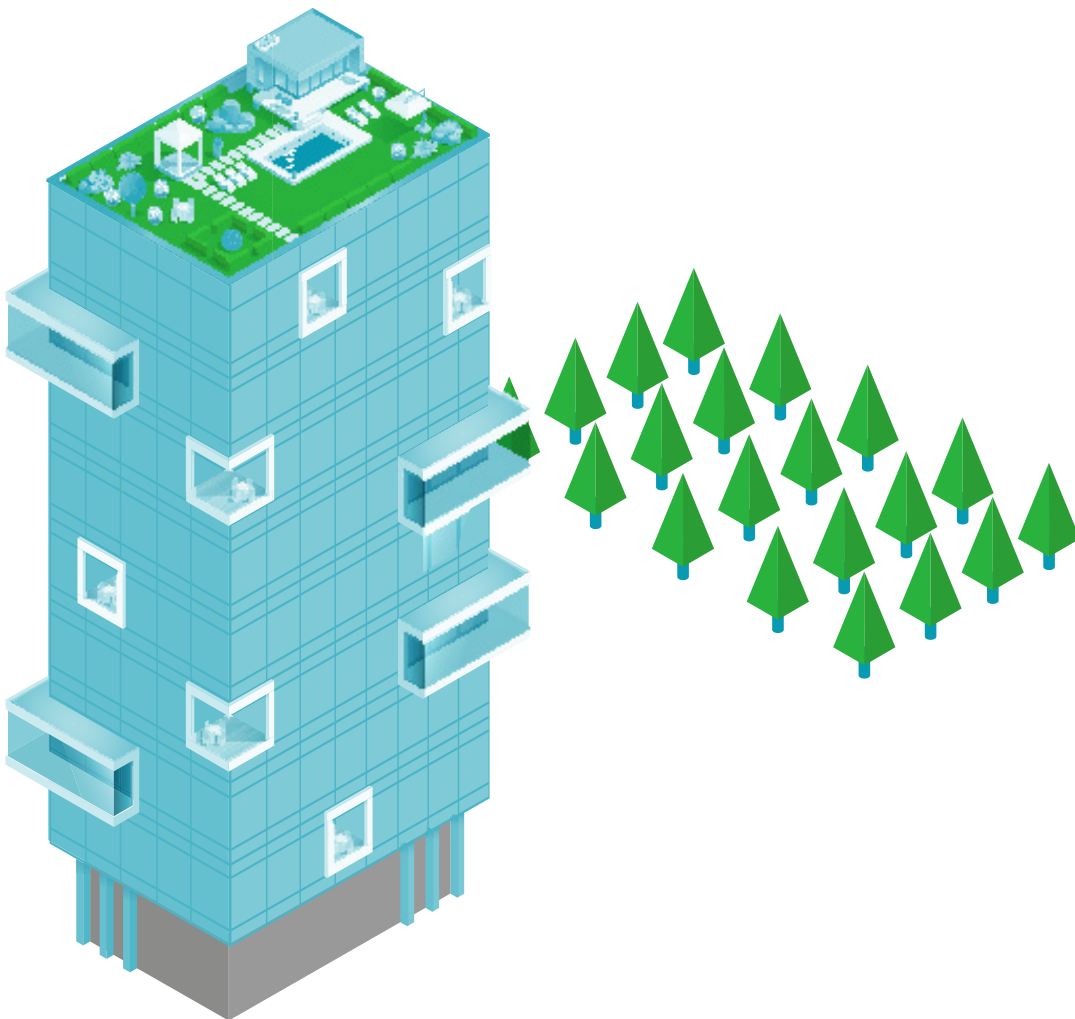
The sustainable lifestyle changes people's general consumer behaviour. Local products are in demand, especially when it comes to food. Cities react to this change by releasing areas for urban farming and urban gardening to promote a regional circular economy. Cities are being transformed from a structure with isolated functionalities to heterogeneous mixed structures for living, working, and producing things. Urban manufacturers for the immediate use of the products generated become the standard and complement inner-city spaces. Consumers appreciate the open and transparent production processes, which enables them to consume more consciously and make purchasing decisions based on comprehensive information. Due to the new consumer behaviour, future city centres will also have to look differently with a more diverse and heterogeneous design. Only focusing on satisfying society's consumption needs is no longer enough. In addition to urban manufacturers, there will also be a focus on communication and meeting spaces that can be individually designed as well as smaller, family-run businesses offering regional products that are not or hardly available online.

More and more city centres change their infrastructure. Cars are being banned in many places while cycle and pedestrian paths are being further expanded. In addition, many cities allow the free use of public transport as an alternative means of transport. Long-distance transport providers offer improved quality, comfort, and reliability to attract new customers and support going green. Above all, stable, free internet increasingly leads to business travellers choosing to travel by rail instead of using their company cars. Parking spaces in city centres are almost completely converted for other uses, e. g., outdoor areas for restaurants, neighbourhood spaces or neutral places that can be used in a variety of ways depending on the occasion. The reclaimed spaces offer scope for experiments based on ideas developed in a collaborative manner. However, the ban on motor vehicles in city centres complicates logistics. Deliveries to restaurants and retail chains become a challenge.

People are very much interested in alternative residential communities, e. g., multi-generational living, and they are willing to share a certain amount of living space with others. Sharing is perceived as a solution for the sustainable use of land resources. Neighbourhood planning is being turned upside down. Neighbourhood offices and cafés, communal spaces for temporary rental as needed (e. g., when family employ au-pairs) and other community spaces become fixed components of land use planning.

Another emerging trend is a new-found interest in the countryside. Increasingly, the number of people moving to the countryside equals those moving to cities. While before the pandemic it was mainly young adults who moved from peripheral areas to city centres, many are now increasingly drawn back to the countryside. Self-sufficiency becomes a new mega trend. Because of the high demand for regional food and people increasingly turning away from imported products, growing your own is very much on the rise. Joining networks for joint farming sees a rapid increase. In addition to products being local, many value that they have a personal connection to what is harvested. On the other hand, the demand for meat decreases as people in all parts of society consume more consciously. Thus, the way land is used could also change.

Designing sustainable ecological cities requires the development of resilient and crisis-proof structures. Planning therefore includes concepts for flood protection by implementing the so-called sponge city model, rainwater management or counteracting heat islands by designing the aforementioned green lungs. Creating smart cities becomes more important because the intelligent linking of infrastructure elements and control of systems through solid data analyses enables resource-efficient use while simultaneously increasing the quality of life for the urban population.

**GREEN AND AWARE –
THE NET ZERO SOCIETY**

SOCIAL AND POLITICAL
CHARACTERISTICS

> INCREASING ECOLOGICAL AND
> HEALTH AWARENESS

> ACTIVISM IS GROWING

> NEW ECONOMY OF MEANING

> SOCIAL MOVEMENTS DRIVEN
> BY NEW, INTENSE HEALTH
> CONSCIOUSNESS

> SHARING OF RESOURCES

> SOCIETY SPLIT BETWEEN
> CONSUMPTION-CRITICAL,
> EXTREMELY ECOLOGY-
> CONSCIOUS AND MORE
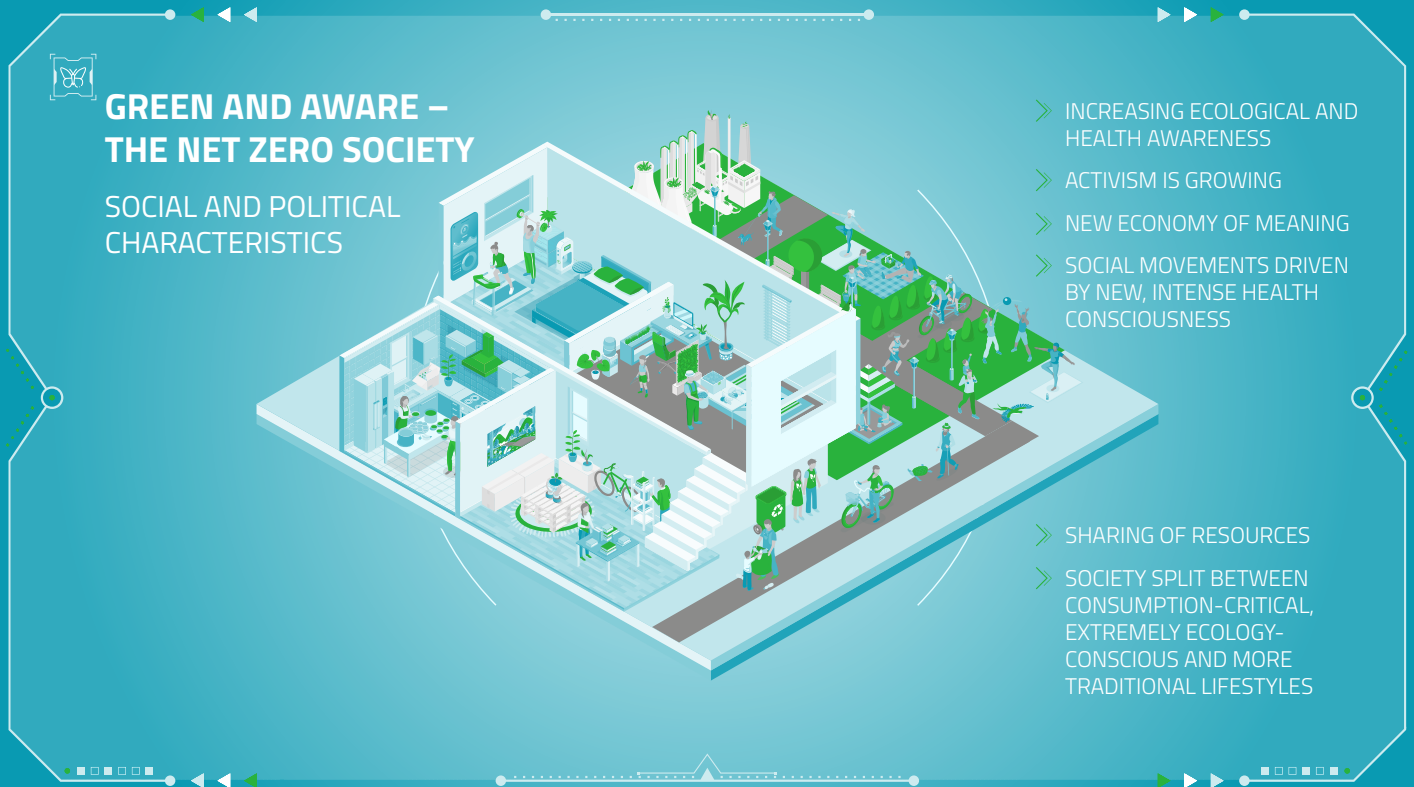> TRADITIONAL LIFESTYLES

*Fig. 9: Ecological awareness as a key component: representation of the social and
political characteristics in the scenario "Green and aware - the net zero society".*

5.1.2   Social and political characteristics

In general, the very obvious consequences of climate change
cause a general process of rethinking in society. Consumer
behaviour as well as political decisions are characterised by an
increasing awareness of ecological and health issues. Sustaina-
bility turns into a way of life and influences a large part of the
population in all areas of life. People are aware that their own
needs are subordinate to the achievement of climate goals
and that personal consumption behaviour must be adapted.
Nevertheless, the state and politicians increasingly rely on strict
regulations and tight frameworks to comply with climate tar-
gets. In addition to new legislation and guidelines more people
become activists, with individuals joining forces to form large
globally active networks and environmental organisations. This
high level of commitment puts pressure on both politics and
business. In some cases, people are very upset about the beha-
viour of politicians and companies, which is perceived as slug-
gish and slowing down efforts. Tensions arise and people turn
away from taking over political roles themselves, i.e., instead of
participating directly in the political process, non-governmen-
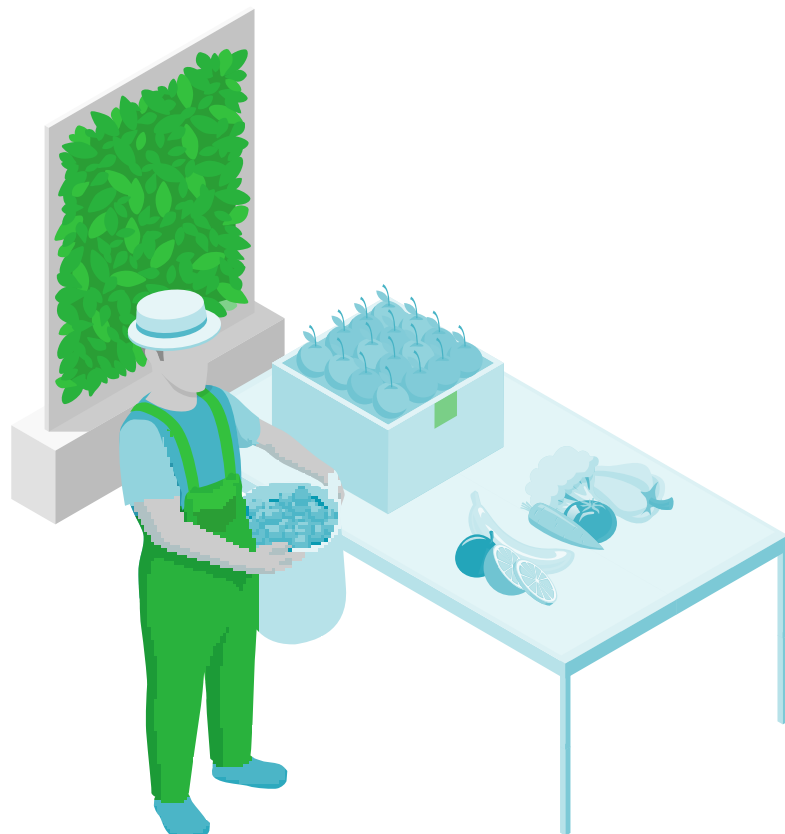tal organisations are increasingly being formed to deal with

specific issues. The strong desire for change within society is
perceived as both an opportunity and a major challenge.

As part of this cultural change, a new "economy of purpose"
emerges, with economic values increasingly revolving around
sustainability and the common good. The "global genera-
tion" grows and manifests itself in an international context
expecting a widespread establishment of a fairer economy
and a fight against climate change as an international commu-
nity. This movement is also related to changes in education.
Learning about economic processes and how they interrelate
as well as teaching children with a view to a new ecological
awareness, e. g., how to deal with finite resources, become key
elements of the curriculum.

In addition to sustainability, a new-found health consciousness
very much drives what is happening in society. In the long
term, the pandemic causes people to take a closer look at their
own mental and physical health. Knowledge about health
issues increases across society, but in some cases also leads to
excessive and thus dangerous handling due to new extremes.
Tracking systems for measuring one's own health data become

increasingly popular. Many people are no longer worried about data analysis to improve the environment through cognitive systems which, e. g., adjust lighting or ventilation. The need for a healthy lifestyle leads to a new importance of self-optimisation, e.g., through the integration of sports activities in everyday life, a good work-life balance, and the choice of a health-promoting environment with local recreation areas. Lifestyle is strongly related to health promotion.

The sharing of resources becomes an established pattern across society. Material possessions are no longer perceived as status symbols but as temporary necessities, without the possessions contributing to a happier life. Sharing basically affects all areas, be it with regards to spaces, vehicles, or other objects. As part of this sharing economy, digital platforms increase in importance and serve to connect the relevant parties. Social interaction becomes more open and people feel noticeably more connected. They see themselves as a global society that can only stop climate change and find innovative ways to coexist with nature when making a joint effort. Nevertheless, there is also a split in society between people that are critical of consumption and extremely conscious of the environment and others who live more conventional lives and do not want to participate in this movement as intensely and uncompromisingly. Sustainably behaviour in all walks of life also requires the necessary financial resources that are often not available to everyone in society.

GREEN AND AWARE –
THE NET ZERO SOCIETY

OFFICE AND WORKING
ENVIRONMENT

> MORE SUSTAINABLE USE
OF RESOURCES

> CLIMATE-CONSCIOUS BEHAVIOR

> WIDESPREAD INTRODUCTION
OF SHARING CONCEPTS

> YOUNGER GENERATIONS
CONCERNED WITH NATURE,
THE ENVIRONMENT AND FAIR
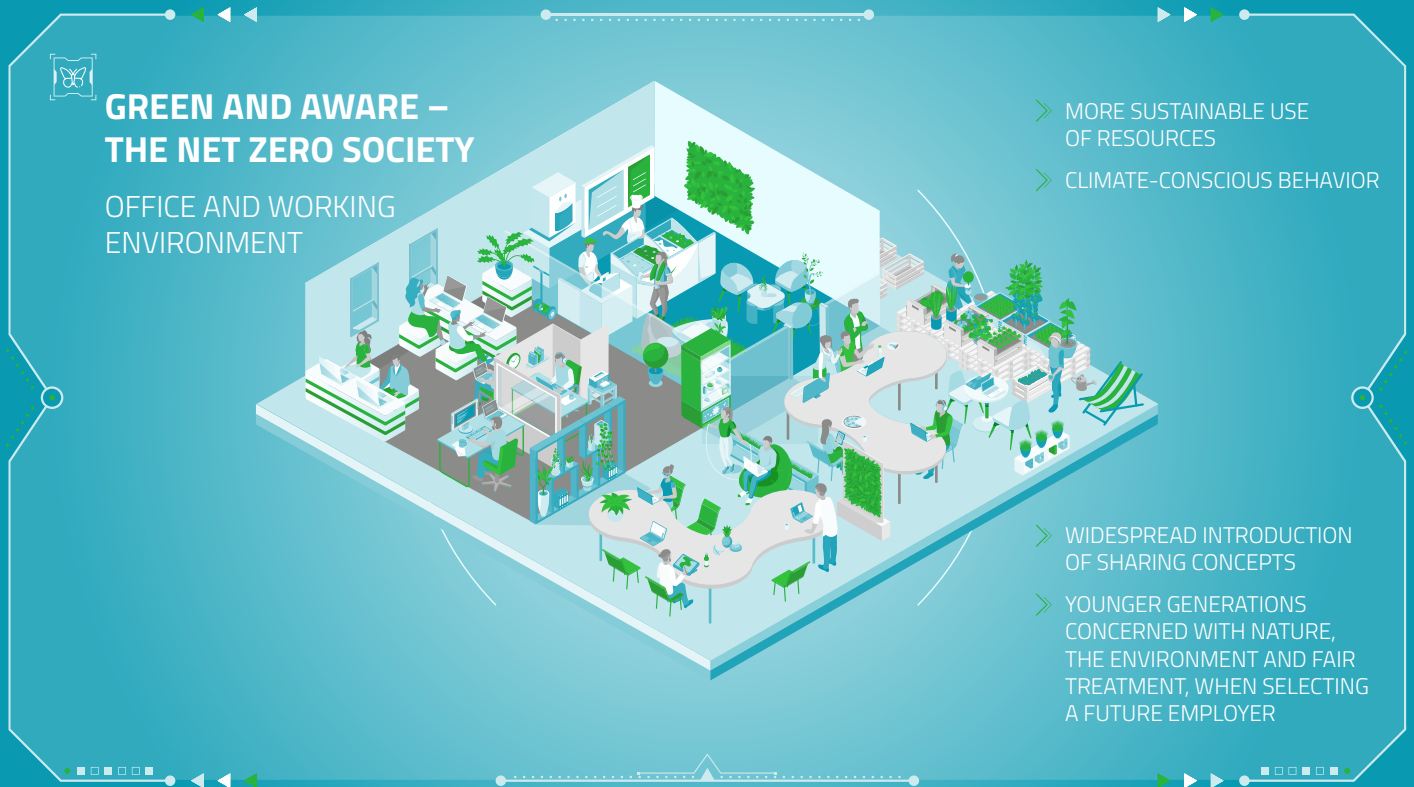TREATMENT, WHEN SELECTING
A FUTURE EMPLOYER

Fig. 10: Climate neutrality and resource conservation: depiction of the office and working world in the scenario "Green and aware - the net zero society".

5.1.3   Office and working environment

The office and working environment is not excluded from the green movement. Companies very much try to use resources in more sustainable ways, with the majority striving for complete climate neutrality in production and infrastructure, such as office space. An important component of the new resource efficiency with regard to the finite nature of space is the broad introduction of sharing concepts. Desk sharing is becoming the new standard for office spaces. In addition, some companies also share central infrastructures with other companies, such as large meeting rooms, coworking areas or streaming studios. As a side effect, creativity and innovation thrive due to interdisciplinary knowledge transfer. In addition, more and more large companies integrate both vertical and horizontal green spaces in their office space. The use of renewable energies is taken for granted. In the office and working world, the motivation to reduce one's carbon footprint is not only related to protecting the environment, but also to attracting new talent. When choosing a future employer, younger generations in particular

increasingly focus on how companies deal with nature and the environment and whether everyone involved in manufacturing processes is treated fairly. Climate-conscious behaviour becomes important for communication purposes and content generated by companies which, however, also results in an increase in greenwashing.

Climate-conscious behaviour leads to a strong reduction in business-related travel. Although people greatly appreciate face-to-face interaction with colleagues or business contacts, especially after the pandemic experience, attending meetings and conferences is each time based on a deliberate new decision. People weigh up whether the CO_2 emissions of a journey really justify the added value of their own experience. Some companies introduce strict CO_2 quotas and employees only have a certain amount of CO_2 emissions that may be used for travel. Once the annual CO_2 budget has been used up, they need to switch to climate-neutral means of transport.

A lot of people continue to work from home after the pan-demic, which is primarily related to their new health consci-ousness but also because their homes and office locations are increasingly further apart from each other. The popularity of living in the countryside combined with the desire to participa-te in agricultural processes in cooperation with others or alone requires a high degree of flexibility regarding when and where one works. Despite the possibility of location-independent work, "workations" remain a marginal phenomenon. Working at holiday destinations, especially at places that would require long-distance flights, does not correspond to people's envi-ronmentally conscious lifestyle, and is therefore not accepted. Only working in coworking and co-living spaces in rural areas is of increasing significance.

5.2 Application to business events

5.2.1 Venues/Destinations

Sustainability and conservation determine social and political decisions in the "green and aware" scenario. When planning and running events these behavioural priorities need to be considered. In order to be more sustainable, existing building structures are chosen as venues. Events therefore take place in existing decentralised event centres as well as in the city centres of smaller towns. In this context, utilisation concepts revolving around 24/7 occupancy for all venues gain in importance. Large event venues sometimes offer several functions and serve as spaces for, e. g. educational facilities, temporary working, start-ups, and projects. These measures counteract vacancies.

As interest in the use of large event centres declines because of the use of urban structures as event venues, more and more concepts are developed to transform existing event venues. One example is urban farming with spaces being used for food production and a focus not only on supplying the residential population but also on sustainable production thanks to short transport routes and the use of existing spaces. Overall, nature and the built environment enter into a new symbiosis. Artificially designed structures and natural elements are no longer perceived as opposites but as a new unity. A completely new ecosystem is being formed which is very biodiverse, the latter also being visible in event venues.

From catering to venue design, attendees expect authentic and integrated sustainability concepts for events. This puts more and more pressure on infrastructure providers to find new solutions and transform event venues in different areas. To create climate-neutral buildings, both the building technology and other infrastructure elements and the equipment design need to be renewed and designed with a view to sustainability. Overall, certificates and green labels are in demand as proof of CO_2-neutral destinations. "Green events" is the central marketing strategy for venues. In addition to an integrated sustainable approach to event management, connections to local and long-distance public transport play a major role in the choice of event venue.

5.2.2 Event formats

Sustainability is at the heart of events not only in the choice of venues or the consideration of infrastructure but also with regard to their content. Conventional set-ups with talks and presentations more or less disappear. Instead, new, and innovative formats are in demand, which above all revolve around integrating the natural environment. Thus, instead of limiting themselves to indoor spaces, many event organisers move events in the open air, weather permitting.

Choosing appropriate event formats focuses on reducing things to the essential, i.e., only necessary tools and furnishings instead of upmarket and lavish set-ups. Cost-intensive, over-the-top design elements are hardly integrated. Instead, improvisation and a modest appearance are order of the day as well as the development of innovative solutions together with attendees. Creative workshops in small groups gain in importance, partly with virtual participation possibilities, partly completely in real life to intensify creative physical exchange. Improvisation and spontaneity are key elements of event formats. Increasingly, event organisers only provide the platform, without stipulating a fixed programme. As attendees are very keen on taking on an active role and participate, high knowledge transfer and learning happens unplanned.

When developing new formats, event professionals seek input from alternative, hands-on outlets, e. g., makerspaces or fab labs, which focus primarily on practical participation when it comes to learning and networking (hands-on learning). Mindfulness and the new health consciousness also play a role when designing events and result in manageable event sizes in a natural, inviting atmosphere, formats that involve some kind of physical activity, longer lasting event sessions and dedicated recovery phases. In addition, as attendees are so health conscious, catering changes, too, with vegan and vegetarian options becoming an integral part of events.

5.2.3 Technologies

Although the "green and aware" scenario in particular focuses on awareness of the natural environment and the development of a new ecosystem with a close relationship between nature, people and the built environment, interest in new technologies and digital tools continues to grow. The aim is not only to combine nature and technology into one but also to come up with new solutions for sustainable and ecological resource management. In general, investments to promote innovation increase significantly. Above all, green technologies that promote energy efficiency, reduces resource and energy consumption as well as pollution and enable a more sustainable economy are key.

The development of integrated smart events, on the basis of already established smart city structures, sees rapid progress, based on the idea of combining individual infrastructures into an integrated ecosystem in order to be able to control resource consumption more efficiently and to benefit from the data provided by each siloed infrastructure element. This is achieved by controlling the utilisation of public transport when travelling to events or regulating temperature and lighting indoors. In addition, smart events offer options for measuring success factors, which in turn leads to a better comparison with other events. With the help of real-time analyses, events can straight away react to individual attendee requirements and surroundings can be adapted accordingly. In order to implement smart, integrated approaches, interdisciplinary working groups are created with the aim of uniting the different user needs (e. g., mobility providers, hoteliers and restaurateurs, city planners, infrastructure providers).

In order to contribute to a more environmentally conscious behaviour and to protect one's own health, business-related travel is reduced in many companies. When the added value of physical attendance and the effort involved is not considered to be worthwhile, people often opt for virtual attendance. With the rise of virtual and hybrid events, digital solutions are needed to develop interfaces between the real world and virtual spaces. This means that the integration of such interfaces needs to be considered as early as planning and constructing buildings.

Based on the pandemic experience, people pay more deliberate attention to their mental and physical health. Systems for integrated health management not only play an important role in the office and working environment but also in the planning and running of events. Attendees' health not only becomes the focus of attention in the choice of catering or the addition of sports activities and mindfulness courses to the programme but also when it comes to designing event spaces. Cognitive environments that can be adapted to specific user needs which used to be rare become a megatrend.

For the purposes of their health and well-being, attendees accept the use of new technologies such as tracking systems, which opens up new and manifold opportunities to work with big data.

5.2.4   Skills profiles

Organisers and infrastructure providers are mainly challenged by the implementation of smart events with networked infrastructure systems. Specialised IT staff is in demand, with a focus on experts for the development and integration of green technologies. In addition, the widespread running of virtual and hybrid events requires qualified staff in the technology and digitalisation sector.

"Sustainability event managers" take care of organising events in a sustainable and environmentally friendly manner. This topic still requires regular and early education. In order to build comprehensive knowledge on how to plan and run sustainable events with a social conscious, special training on ecology and sustainability are part and parcel of event professionals everyday work life. As climate change advances, more environmental incidents occur and learning loops are established to inform employees at regular intervals about the current situation and new measures.

Innovative and creative minds who work on the future of landscape planning and urban farming are in demand to create a new relationship between nature and the built environment. Event venues have to reinvent themselves, which in turn leads to a high demand for ideas on how to transform existing structures. Sub-sectors in architecture that were previously perceived as marginal move in the focus general interest, e. g., the demand for professionals who design "living buildings" consisting of technical and plant elements increases.

In order to promote not only the health of event attendees but also the health and personal development of employees, the need for health care services increases. These deal with both the data from the attendees' tracking devices and employee health. If stress levels are too high, they provide support and advice.

5.3 Definition of recommended actions

5.3.1 Organisers (companies, associations, agencies)

The worldwide progress of climate change is alarming. Natural disasters, extreme temperatures as well as rainfall endanger how we live together and influence our behaviour and decision-making overall. How people work is increasingly shaped by rising environmental awareness. In order to achieve climate neutrality, business trips are avoided as much as possible. Hybrid meetings are used to engage with customers or innovation networks. In order to avoid the necessity for long-distance transport, to regain independence in production and to establish a new relationship with nature from a psychological point of view, interest in regional food and growing one's own fruit and vegetables increases. Urban farming becomes a mass phenomenon. Being independent of space and time is very much on the increase in order to allow employees to commit to environmental and social causes. Working from home becomes the new normal. Overall, event agencies operate with flat hierarchies. Employees have many options to actively participate in company processes and influence what they do and how they are organised. The high degree of participation promotes identification with employers.

The most important thing for organisers is cooperation and regular exchange with others. Above all, collaborating with research institutes as well as universities and other higher education institutions is of great importance. Scientific aspects are considered when making economic decisions, as the advance of climate change has led to companies acknowledging the importance and scope of scientifically based predictions. To increase sustainability, organisers work closely with regional service providers. When deciding on whom to work with, the regional reference is key. Local products are used for catering as well as existing mobility chains and event venues (see service and infrastructure providers). For the development of innovative and sustainable concepts and a general resource-saving approach, global innovation networks with regular virtual working meetings are being created. Organisers also cooperate with specialised PR and communication agencies that support the marketing of integrated green events.

New job profiles complement the classic team composition in agencies. This includes "sustainability managers" in order to consider the sustainable and conscious use of resources in every decision related to the planning and running of events and the internal organisational structure. They keep track of all internal and external developments and are actively involved in decision-making. "Green creators" become part of the marketing and communication department. They are knowledgeable about influencers who specifically address meaningful issues as well as "green living influencers" focusing on an environmentally conscious lifestyle and are well versed in the key marketing and communication tools for conveying brand messages. As people are not only more aware of environmental and climate issues but also of their health, organisations develop concepts for an integrated health management, which goes beyond the provision of healthy food and ergonomic workplaces for employees. The latter are provided with a health care service for mental and physical health. "Mindset yogis" provide advice to promote the mental health of employees given the high pressure to perform and optimise oneself as well as the overstimulation and mental stress caused by climate change. Their main task is to increase mindfulness and a conscious lifestyle in order to better manage pressure and reduce it in the long term.

The range of products and services offered also has sustainability and saving resources in mind. Overall, event agencies strive to enable the environmentally friendly and sustainable running of events as quickly as possible across the board. To this end, customers are also nudged to make them behave in a more sustainable matter (e.g. development of CO_2 statements for events). In this case, nudging means influencing users to be-have in an environmentally friendly way. The recalibration of events requires a variety of different investments different areas, including the measurement of CO_2 footprints. Strategies for measuring the CO_2 emissions of an event enable it to be placed in the overall context ("How climate-neutral are we?") and promote the disclosure of possible "climate leaks". For agencies, these benchmarks are especially important at the beginning of the transitional process as they lay the foundation for the development of long-term sustainability strategies. An overall understanding of processes is needed to implement sustainable action. Building internal skills to increase knowledge transfer is therefore another area where investment is needed.

5.3.2   Service and infrastructure providers

Organisation and the way service and infrastructure providers work together changes with the advance of climate change and changing environmental conditions. Society's new mindset with a focus on both environmental and health awareness determines where people work, corporate culture and production and economic processes. Overall, both autonomy regarding space and time increases, virtual collaboration continues to grow and working in temporary globally networked project groups becomes the new standard (see organiser). In order to be able to offer sustainable infrastructures and resource-saving services, providers work closely together in various cooperative partnerships.

Green tech companies advise on the use of green technologies both for mobility concepts for arrival and departure and for equipping event venues with the appropriate building technology (e. g. use of renewable energies). In addition to the regulation of climatic conditions or drainage systems, the comprehensive implementation of sustainable infrastructures also requires new solutions for interior design. Product designers who specialise specifically in sustainable, reusable, or degradable materials and who pay attention to multi-flexible use in their products will be permanently involved in processes in cooperative partnerships. In addition, interest in concepts for the development of cognitive environments sees strong growth, which necessitates collaboration with experts. In order to create a new symbiosis between the natural and built environment and to use event centres for different purposes in innovative ways, many infrastructure providers increasingly rely on cooperation with urban gardening and farming as well as with landscape architects. In addition, there is close cooperation with urban manufacturers, i.e., smaller regional companies that move their production partly into the existing and unused event venues and give both the building and the surrounding environment a new lease of life.

New job profiles for service and infrastructure providers include gardening experts with specialist knowledge in the cultivation and care of plant species, e. g. at urban farms, and who can communicate closely with external companies and those interested in using vacant spaces. Experts for designing "living buildings" are also high in demand to create a new symbiosis between nature and buildings and to complement event spaces with outdoor areas. In order to make catering at events climate-neutral and health-promoting, caterers are being replaced by "green food design" experts who not only create sustainable and healthy menus but also develop options for do-it-yourself lunch boxes to meet individual requirements. Especially event venue providers employ green tech experts. Based on their expertise in innovative technology and know-how how to use is for services and in venues, they liaise with external green tech companies.

Event venues as well as service providers (e. g. catering) are faced with increasing demands regarding the ecological and environmentally conscious use of resources. In order to attract customers and event attendees, a transparent and open handling of products, logistical processes and energy sources is required. Innovations and the development of new ideas are at the heart of their product and service offering. Nevertheless, the high degree of innovation does not necessarily mean that the product range is more divers. Rather, it is somewhat more limited than before, partly because sustainability aspects need to be considered.

Among other things, investments are being made in four areas, i.e., development of innovative and sustainable mobility concepts, development of a "green architecture" for people and nature, ideas for a 24/7 occupation of venues, e.g. through temporary usage options, and the establishment of a smart environment through the implementation of intelligent systems across infrastructures. The high transformation cost, lack of internal skills and the high competitive pressure are perceived as particular challenges for the future.

5.3.3   Destination marketing organisations (DMOs)

The way DMOs work as well as their cultural and business model changes in a similar way as is the case for service and infrastructure providers and event agencies (see organisers). Differences can only be seen in the choice of future partners. While infrastructure providers increasingly look to cooperate with green tech companies in the building technology sector, DMOs establish partnerships in the real estate and project development sector. This can mainly be explained by the partial relocation of events to city centres and the temporary use of existing buildings. Cooperation with environmental scientists and landscape architects is also more in demand than ever. The changing climatic conditions also alter location-specific flora and fauna. In order to develop future-proof concepts for the establishment of plant species in and around event venues, cooperation with teams of experts who know how our ecosystem will develop in future is indispensable.

The job profiles within DMOs change to some extent and new ones are added. In order to be able to justify the travel costs to attend events, the added value of in-person attendance must be very clear. To increase the added value, events not only offer interactive workshop formats and presentations but increasingly cooperate with regional institutions and companies to create authentic and local experiences. Local expert-know about current developments and trends in their own region (start-up culture, art, regional manufacturers, etc.) and are on hand to advise event organisers.

With advancing climate change, environmental disasters increasingly threaten urban structures so that cities as a whole need to become more resilient. This is an essential task for all those involved in urban planning and design. Researchers on resilience complement the wider network of DMOs to create urban structures that are set up to deal with incidences, which also influences event planning by linking events and urban development. Green infrastructure experts can contribute significantly to this and increase the protection and promotion of natural environments in cities. "Smart city engineers" also support the development of smart infrastructures, considering all user groups.

The portfolio of settings for events changes. Urban structures are increasingly being taken into consideration when choosing a venue. Above all, the use of green spaces in cities and public spaces increases. This development requires coordination and support from DMOs. In addition, the demand for authentic venues with a strong regional connection continues to increase, which requires assistance in the creation of storyboards. The development of communication strategies to increase competitiveness can be a focus of investments undertaken by DMOs. In addition, running events in cities requires specifically defined areas for experimentation to test different formats in city centres prior to events. This requires both additional staff and investment cost before such models can have a positive impact on the design of city centres. The development of concepts for how to use spaces in existing buildings requires close cooperation between real estate developers, urban planning offices, event organisers and the people living in the respective cities. However, if cooperations are successful, so-called micro events can have a beneficial effect on all parties and contribute to the development of innovative ideas and concepts.

6. Future potential for business events

The Covid-19 pandemic caused a sudden change in the way we live on a global level. Business events can develop in different directions based on the experiences and learnings of the last months. In order to assess these possible developments, the scenario methodology was used in the previous chapters. This enables showing different future scenarios depending on the composition of influencing factors and to describe the corresponding effects on events. The scenarios cannot be divided into "good" and "bad". They are neutral. They all involve major challenges and risks, but at the same time also opportunities and chances.

Individual aspects were extracted from all three scenarios and on that basis overarching market potentials were identified. These partial aspects outline new possibilities in different areas and can serve as a first starting point for the transformation of the world of events.

6.1 Conquering new spaces

6.1.1   Transformation of existing structures

Events provide an important link between individuals and groups. Despite the pandemic, events are still expected to take place in physical spaces. Nevertheless, the number of people attending in person will per event tend to decline due to alternative options to attend virtually. This development has an impact on the operation and possibly also on the required number of event centres. Some big event spaces may consider transforming existing structures due to increasing vacancy. In general, spaces of this size are valuable, albeit finite, resources that could be intelligently developed or repurposed with

corresponding strategies. Coming up with new concepts requires analysing the respective surroundings and their specific requirements. The development of blueprints as guides for the transformation of event centres can support and accelerate the process of developing new concepts. Questions to answer in this context are: What kind of added value can event centres have for their surrounding area? Which target group should be among the users? In which environment is the venue located? What is the basic social objective of the concept? If the event space is located in an industrial area, urban farming for food production could be considered. If it is close to the city centre, temporary mixed uses might make sense and create innovative spaces for people to come together, such as pop-up stores, alternative spaces for educational institutions (e. g. schools, adult education centres, daycare centres) or indoor sports facilities. The available space can be divided by room-in-room systems for the easy implementation of new uses and flexible structures.

6.1.2   Pop-up events in cities

In addition to the transformation of existing event centres, micro events can also give new life to other existing buildings. Up to now, the centres of big cities have mainly been characterised by large commercial areas. Retail chains and shopping centres offering a diverse range of products characterise the look of shopping streets. However, city centres are increasingly confronted with declining footfall because of advancing digitalisation and e-commerce. As events are also likely to take place in working groups that are in different locations or in hybrid set-ups, new opportunities open up for using unconventional spaces. Events could take place in department stores or smaller shopping arcades and contribute to the revitalisation of city centres and make them more attractive. In addition and given suitable event formats, there is potential to attract "attendees to go", with people no longer flocking to city centres for shopping, but to "consume" inspiration, knowledge and emotional experiences. Pop-up events can also be a design element to

revitalise public spaces, e. g., parks, market squares or smaller neighbourhood squares, and to position city centres as a place of encounter and knowledge exchange. If pop-up events are intelligently relocated to dark, poorly visible locations near railway crossings, subways or similar, they could even have a positive effect on urban areas that people are usually not comfortable with and anxious about. In order to get an overview of current pop-up events in urban spaces, digital tools can be used, such as a potential "Pop-up Mapping" app that makes personalised event recommendations and also notes whether an event is open to the public or has limited access. Such tools can promote the active participation of diverse social groups.

6.1.3   The potential of virtual spaces

When developing new physical venues, it is often necessary to take virtual spaces into account. When planning new event venues, it is advisable to consider how to integrate virtual attendees as early as possible, i.e., when deciding on rooms and the structural design. Installing digital screens and smart interfaces later on will not be sufficient in the future to guarantee the successful running of hybrid events. However, the rise of virtual spaces does not go hand in hand with a loss of importance of spaces in the real world. Rather, how spaces are designed becomes more important, with physical spaces being supplemented by virtual ones, e. g., with topic specific 3D/2D projections and mixed reality. The basis of working with augmented reality in physical spaces is the clear definition of the required or desired atmosphere. If used correctly, specially designed utopian landscapes in virtual space could also change physical spaces in the long term and offer new opportunities.

6.2 Showcasing a region's authentic character

6.2.1   New catering culture

Not only attending an event but also what we eat is increasingly based on very conscious decisions. Eating is more than the mere intake of food. Other aspects of social life and changed value systems are increasingly associated with individual diets. On the one hand, groups are formed around various specific food preferences, and on the other hand, the social group we belong to influences what we eat. Health consciousness and self-optimisation increase the demand for healthy food, which is usually associated with a high degree of regionality and organic certification. This is complemented by the use of seasonal foods to fulfil sustainability requirements. Nevertheless, consumers continue to demand a wide choice and high quality. Organisers should be aware of how important food and what they eat has become for attendees. Working with local suppliers not only supports regional economies and saves on transport but it can also have a positive effect on attendees' event experience. Attendees should also clearly be informed about the food on offer. Seasonal offers that are characteristic for regions can also make catering more authentic. It is important to understand that food can be used as a means of communication and contribute to an event's topic.

6.2.2   Regional storytelling

Experiences can become stories and these stories last in our memories. When emotional experiences are linked to taking in new information, people learn more. Therefore, events need an overall script to be successful in the future. Regional aspects can create unique moments for attendees. Such special features can be biological treasures or local innovations and young entrepreneurs who have deliberately chosen the location in question. Instead of being exposed to digital and social media information overload, the added value of physical events could be getting to know micro trends and applying them to a larger context or to one's own needs. Visiting urban manufacturers, can trigger attendees' curiosity and lead to unplanned experiences. The possibilities of integrating regional features are manifold and can range from furnishing the event with selected interior design products to using local beverage providers.

6.3 A multitude of user needs

6.3.1   Rethinking the "customer is king" principle

Attending an event is a luxury for many attendees and can contribute to employee retention in companies. Despite a decline in physical events during the pandemic, events will continue to play a significant role in social interaction, knowledge sharing and customer relationship building. In order to create an integrated "customer is king" experience, it is important to provide attendees with a personalised experience, taking individual needs into account. However, not only the event as such but also the arrival and departure, registration and a possible extended stay in the respective location need to be designed in a user-friendly way. Event organisers could consider working with specially trained employees as personal, empathic companions. In order to provide a one-to-one service, the use of service robots could be an important means of increasing customer satisfaction. Customers want to be addressed individually and personally. At the same time, the definition of luxury has changed in recent years. Instead of buying products from specific brands to express oneself, luxury now often consists of individual experiences and time, as well as enjoying the moment. Providing limousine transport and replacing the classic rows of seats with high-end velvet lounge chairs will not be enough to live up to the customer is king principle. It is not about showing off to the outside world but about achieving an internal effect through authentic, regional, unique, and rare products or individual experiences.

6.3.2   Participation and DIY

Participation creates emotional attachment, both to the event and to the host. Organisers need to take attendees' opinions seriously and consider them when developing events. In essence, the tasks of an event organiser are more than ever community management or media creation with the ability to ask their community the right questions and to create a story from the insights gained. Attendees should be involved in the planning from the very first event idea with the help of live surveys on social platforms, online polls or participation opportunities in the form of creative contributions. During the planning phase, people need to be informed about the current status on an ongoing basis. The rise of the maker movement also needs to be considered. Makerspaces, fab labs, and creative workshops are a contrast to the classic work activities of office employees and knowledge workers. For many people interested in the maker movement, actual manual work is done deliberately as an antidote to their office-based work. The event industry can tap into this trend. Integrating DIY units during an event can also create stronger emotional experiences and contribute to building relationships with attendees. To counterbalance presentations and talks, live workshops in small groups and providing insights into start-up experimentations at cooperating fab labs or maker spaces can complement the programme.

6.3.3   Smart systems for personalised advice

Using smart tools can enable better consideration of individual customer needs. This already starts with someone planning to attend a specific event. During the pandemic, a complex network of different events was formed, each with diverse attendance options. Overall, the event landscape becomes more complex and less transparent, not least due to the addition of virtual events. The range of large-scale events, hybrid events, multisite congresses or creative workshops in small groups is growing on a daily basis. In the future, apps will be needed that show the full range of events and can make personalised recommendations based on personal data in order to find events that are suitable and meet people's requirements.

6.4 A new mindset emerges

6.4.1 Slow events – decelerate and focus

Mindfulness and health are social values that will increasingly shape behaviour patterns and decisions in the future. As an alternative to the fast pace of life and high stress levels caused by information overload, a tendency to go slow is apparent in virtually all walks of life. Be it slow food, slow media or slow travel, the word "slow" seems to have become the new way of describing conscious experiences without haste. This trend could also increasingly impact the event industry. Instead of passive experience, there is a desire for interaction and to experience things with all senses. In order to design slow events, it is necessary to have the courage to leave gaps in the programme, also or especially because of the risk of attendees becoming bored or restless as precisely these gaps can be moments when new ideas and innovations are developed. In addition, deceleration has a positive effect on attendees' ability to focus. Going slow can both satisfy what attendees expect of themselves and events, i.e., personal development. Gaining time and space can be the key to intuitive ideas.

6.4.2 Tracking systems for the improvement of physical spaces

Up to now, attendees have been critical of the use of tracking systems based on, e. g., wearable devices, with a great deal of mistrust regarding data security. However, if trust is gained, tracking systems can be the solution for developing and implementing cognitive environments. For example, room temperature and lighting could be controlled with the help of intelligent systems to react to the general level of attention of attendees. Personal data could be used to adapt furniture according to body size if this has previously been assigned to attendees. Catering could be personalised based on individual diets or food allergies. Precisely because our surroundings have become safer and more controllable in many aspects in recent years, the personal perception of safety and risk continues to rise. Due to digitalisation and globalisation, the degree of complexity has increased rapidly in recent years. In order to give attendees a sense of security and confidence in events which are attended by many people, a well-developed security system is required which also benefits from the use of smart technologies, e. g., to implement hygiene standards in the premises or to minimise the risk of assaults, e. g., criminal acts or cybercrime.

6.5 Mobility in the modern age

6.5.1 Smart mobility

The time and cost of travelling to in-person events is one of the most common reasons why people decide to attend virtually. In order to continue to attract sufficient attendees on-site in the future, even the journey to an event needs to be as easy and convenient as possible. This also requires the comprehensive integration of smart tools that enable easy switching between means of transport, e.g., from planes to shuttle busses and sharing bikes. Personalised mobility chains need to be clearly defined and booked before the start of the journey. The recommendation of certain means of transport can also be based on personal preferences. For example, attendees who follow influencers focusing on meaningful issues could only receive climate-neutral means of transport displayed in their recommendations. Attendees using apps for tracking sports activities could be provided with suggestions on how to cover a certain distance on foot or by bike. Nevertheless, it needs to be possible to flexibly adapt the means of travel according to real-time analysis and delays.

6.5.2 Third places and use of travel time

Time is the most important commodity in modern society. For many it is very important to fill as many minutes as possible with activities that contribute to getting things done or to their personal development. Accordingly, travel time is also given an additional function. Already today, the use of local and long-distance transport is not only about being mobile but also about answering e-mails, making phone calls, or editing documents. More than ever, work becomes detached from the actual office space or one's home in the case of working from home. Thanks to mobile devices and the availability of stable internet connections, many professionals can now work anywhere. When work is done neither at the office nor from home, but in cafés, libraries, different means of transport or at railway stations, these locations are referred to as "third places". At events, too, attendees increasingly expect to be provided with suitable workplaces, e.g. lounges or desks. This can also be transferred to the design of local and especially long-distance transport. In order to use travel time as working time, designating special zones in means of transport could create a suitable working atmosphere. The integration of phone boxes or small meeting rooms that can be booked in advance for a small extra charge could also support working on the move.

6.5.3   Shared mobility to support networking

Sharing has found its way into all areas of life. While sha-
ring was previously often associated with people not having
enough money, it now stands for sustainable and responsible
behaviour. Workplaces in companies are shared, often to
increase space efficiency, as well as living spaces, e. g. in shared
apartments or neighbourhoods with shared communal areas,
and means of transport such as bikes, cars, or e-scooters.
Shared micro-mobility in particular has been gaining popularity
in cities for years. To cover the last mile, many travellers rely on
platforms, e. g. for bike sharing. Carpools to reduce costs and
emissions turn individual transport into a public or semi-pub-
lic means of transport. Building networks to get to an event,
especially when covering the last mile, not only contributes
to sustainability, but can also support networking between
attendees prior to events. To successfully set up a carpool, it
is not only necessary to coordinate time and place, but also to
put together a group that is as harmonious as possible based
on personal preferences and professional skills. Thus, the car-
pool and joint travel becomes an introduction to the event and
organic part of it while also considering sustainability.

7. Summary and outlook

The FMS 2021 research looked at the changing ecosystem and the resulting effects on the event industry, each with individual challenges and opportunities. In order to discuss the future of business events, three scenarios were developed and analysed at different levels. These include changes in the office and working world as well as the mobility transition and social developments. Using this method enabled outlining various forecasts. They are based on individual interdependencies depending on the influencing or key factors and their characteristics.

Both the third and this year's fourth research phase were significantly impacted by the pandemic. The events industry been affected by Covid-19 like hardly any other sector. In recent months, companies and employees have had to react to unforeseeable consequences in extremely flexible and agile ways and, in some cases, complete reorganisation was necessary. Virtual events became a defining factor of the entire event landscape.

In 2022, the GCB German Convention Bureau e. V., together with the Fraunhofer Institute for Industrial Engineering IAO, is planning to continue its applied research with the FMS innovation network, focusing on the described, scenario specific as well as general challenges of our post-pandemic era.

The 2022 research topic will look at event attendees' future travel behaviour because we know from the current research phase that people will again travel more in the future – probably not as intensively as before, but more consciously and only for selected meetings. Our upcoming research will therefore focus on defining different travel typologies/characterisations and their operating range. Different travel patterns will be analysed in order to identify target groups and offers. The results are intended to form the basis for developing ideas and making suggestions for events and their different stakeholder groups.

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