



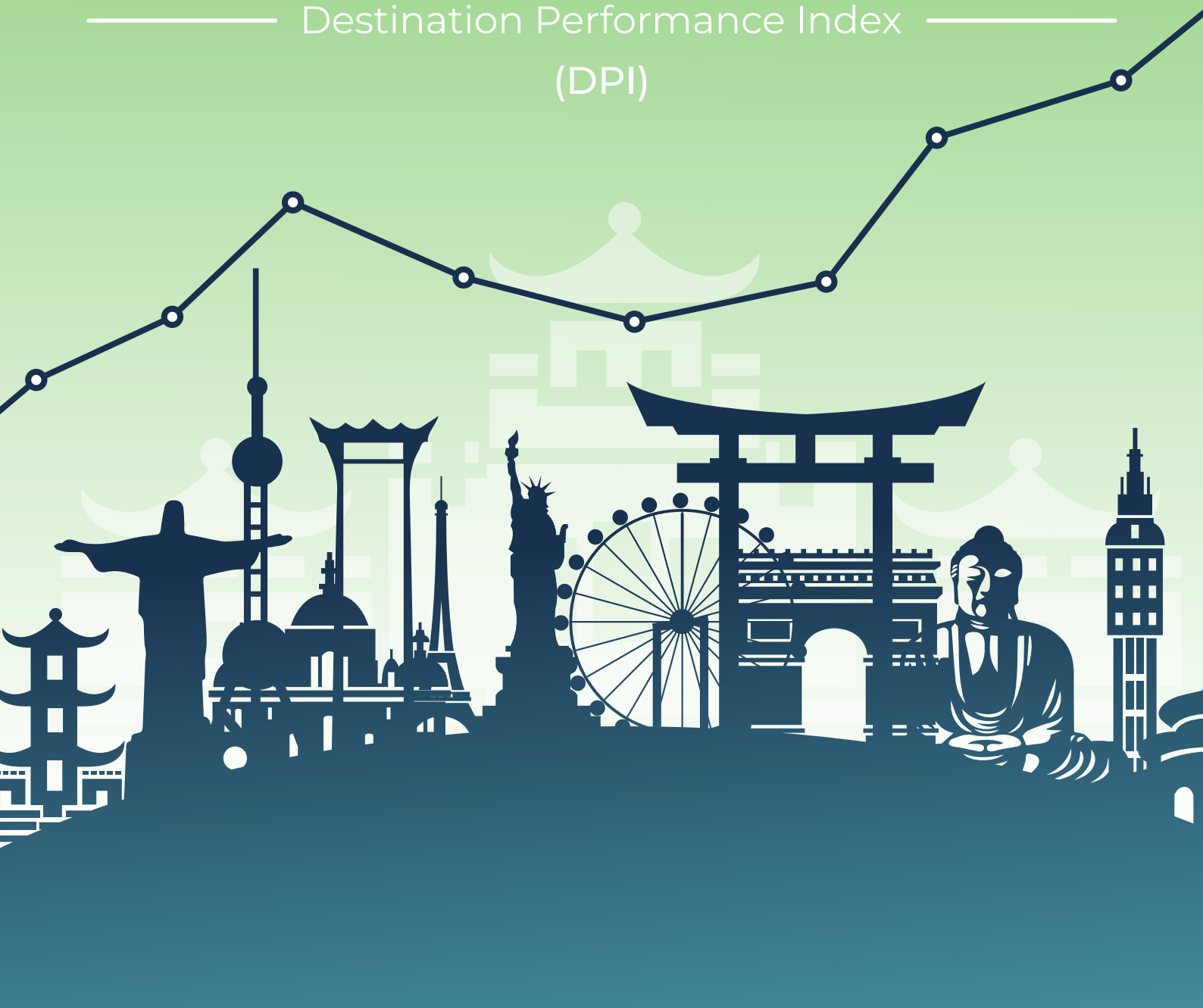
ICCA

2021

ICCA Ranking

Public Abstract

Destination Performance Index
(DPI)





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

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

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

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

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

Introduction

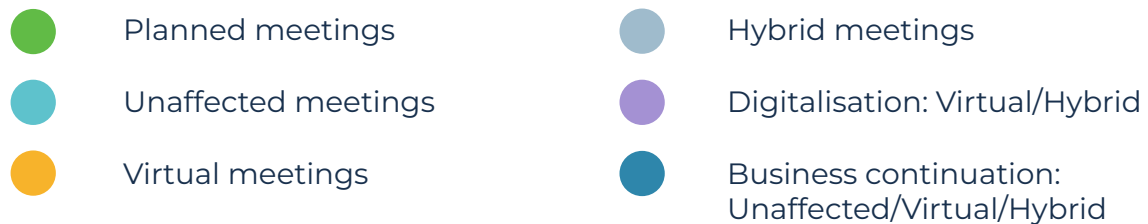
Due to the uneven playing field created by the pandemic, ICCA did not publish its annual Country/City ranking last year. Consequently, the decision was made to omit the Public Abstract as well. Only the ICCA annual statistics report was published for our members. Like last year, we have again categorised the Corona-affected meetings as:



This year, even though some regions were hit harder than others, all destinations have had time to adapt to the changing circumstances. In the pre-pandemic era, ICCA's Country/City ranking would only include meetings that were actually held on-site, i.e. the "Unaffected" meetings.

However, due to the pandemic, the percentage of "Unaffected" meetings is less than 10%. To resolve this issue, ICCA has developed the Destination Performance Index (DPI) in order to acknowledge and reward the effort put forth by destinations with regard to winning the original bid, COVID policies, adaptability and technological capabilities to convert on-site events into virtual/hybrid events –thereby maintaining business-continuation.

The DPI consists of the following performance indicators:



All of the above indicators result in separate rankings which are combined into the DPI. The DPI can be seen as the aggregated ranking of the 6 individual rankings. The DPI is available on Worldwide/Regional level and on Country/City level. The following regions are available:

- | | |
|-------------------------------|----------------------|
| 1. Worldwide (WW) | 4. Africa (AF) |
| 2. North/Latin-America (N/LA) | 5. Middle East (ME) |
| 3. Europe (EU) | 6. Asia-Pacific (AP) |

Please note that the Virtual status is assigned to the destination that initially won the meeting. However, ICCA cannot ascertain whether the destination itself was involved in hosting the virtual aspect of said meeting.

This Public Abstract contains a small excerpt from the DPI. To obtain the full version of the DPI, please contact ICCA (icca@iccaworld.org). The full version is available as an Excel-file, which will give you the ability to sort on the different individual rankings as well. The idea behind this is that, (besides the DPI itself), each destination can determine in which of the individual rankings they rank the highest.

Destination Performance Index

Top 50 countries

	Country	Planned	Unaff.	Virtual	Hybrid	Digit.	Business Cont.
1	U.S.A.	512	32	268	54	322	354
2	Spain	369	38	173	52	225	263
3	Germany	354	31	177	42	219	250
4	France	331	30	128	48	176	206
5	Italy	331	18	165	46	211	229
6	United Kingdom	337	12	190	29	219	231
7	Japan	364	3	185	61	246	249
7	Portugal	246	26	110	34	144	170
9	China-P.R.	233	12	79	71	150	162
10	R. of Korea	211	5	87	56	143	148
11	Austria	166	15	85	30	115	130
12	Netherlands	226	10	115	21	136	146
13	Belgium	182	24	74	25	99	123
14	Canada	239	3	132	14	146	149
14	Sweden	183	13	94	11	105	118
16	Switzerland	146	16	64	27	91	107
17	Greece	149	15	61	25	86	101
18	Denmark	150	24	56	19	75	99
18	Poland	158	5	67	28	95	100
20	Australia	204	2	79	15	94	96
21	Norway	137	8	69	9	78	86
22	Finland	135	3	78	11	89	92
23	Czech Republic	118	6	53	17	70	76
24	Chinese Taipei	103	3	53	20	73	76
25	Singapore	102	3	56	16	72	75
26	Mexico	101	9	52	10	62	71
27	Brazil	101	4	66	5	71	75
28	U.A.E.	70	21	21	14	35	56
29	Hungary	66	12	31	10	41	53
30	Russia	70	5	24	14	38	43
31	Colombia	65	8	25	10	35	43
32	India	66	4	37	6	43	47
33	Argentina	95	1	53	9	62	63
34	Ireland	131	1	65	4	69	70
35	Croatia	59	8	20	11	31	39
36	Slovenia	56	6	24	5	29	35
37	Estonia	47	5	15	12	27	32
38	Turkey	61	13	22	2	24	37
39	Thailand	78	0	44	5	49	49

	Country	Planned	Unaff.	Virtual	Hybrid	Digit.	Business Cont.
40	Romania	44	3	23	5	28	31
41	Lithuania	43	5	13	10	23	28
42	South Africa	74	0	31	6	37	37
43	Malaysia	76	0	41	3	44	44
44	Chile	47	2	22	4	26	28
45	Hong Kong, C.-P.R.	39	1	20	7	27	28
45	Indonesia	50	0	26	7	33	33
47	Serbia	36	2	13	9	22	24
48	Kenya	22	5	9	5	14	19
49	Iceland	46	5	15	1	16	21
49	New Zealand	44	1	21	3	24	25



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

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

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

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

Top 10 countries by performance indicators

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

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



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

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

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

Destination Performance Index

Top 50 cities

	Country	Planned	Unaff.	Virtual	Hybrid	Digit.	Business Cont.
1	Vienna	113	9	61	22	83	92
2	Lisbon	123	7	59	25	84	91
3	Athens	87	10	40	16	56	66
4	Barcelona	90	9	41	13	54	63
4	Singapore	102	3	56	16	72	75
6	Madrid	79	11	32	19	51	62
7	Prague	95	3	44	14	58	61
8	Paris	84	7	31	12	43	50
9	Berlin	76	6	38	9	47	53
10	Brussels	66	16	25	11	36	52
11	Amsterdam	65	4	32	11	43	47
12	Budapest	57	10	26	10	36	46
13	Seoul	99	1	48	15	63	64
14	Copenhagen	70	13	24	8	32	45
15	London	67	2	39	8	47	49
16	Porto	65	9	30	5	35	44
16	Rome	48	4	24	12	36	40
16	Stockholm	58	4	30	6	36	40
19	Montreal, QC	68	1	46	6	52	53
20	Taipei	64	1	31	12	43	44
21	Dubai	51	17	13	10	23	40
22	Helsinki	74	1	45	4	49	50
23	Lyon-St. Etienne	44	4	20	6	26	30
24	Aarhus	38	5	19	6	25	30
24	Warsaw	49	2	20	7	27	29
26	Oslo	53	3	27	3	30	33
27	Beijing	52	1	25	8	33	34
28	Milan	44	2	32	3	35	37
29	Buenos Aires	66	1	37	3	40	41
30	Munich	31	4	18	6	24	28
31	Jeju	36	4	9	17	26	30
32	Dublin	93	1	41	2	43	44
33	Vilnius	38	5	13	7	20	25
34	Gothenburg	52	2	30	2	32	34
35	Cracow	45	1	21	6	27	28
36	Hong Kong	39	1	20	7	27	28
37	Tallinn	33	5	11	7	18	23
38	Gent	37	2	16	6	22	24
39	Shanghai	40	3	9	11	20	23

	Country	Planned	Unaff.	Virtual	Hybrid	Digit.	Business Cont.
40	Geneva	30	2	14	7	21	23
41	Valencia	32	3	18	3	21	24
42	Zurich	32	4	13	4	17	21
43	Rotterdam	44	1	23	3	26	27
44	Melbourne, VIC	58	1	25	2	27	28
45	Ljubljana	39	1	18	5	23	24
46	Torino	31	1	19	4	23	24
47	Thessaloniki	28	4	11	4	15	19
48	Tokyo	79	0	51	9	60	60
49	Edinburgh	34	1	20	3	23	24
50	Boston, MA	30	1	17	5	22	23



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

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

Top 10 cities by performance indicators

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

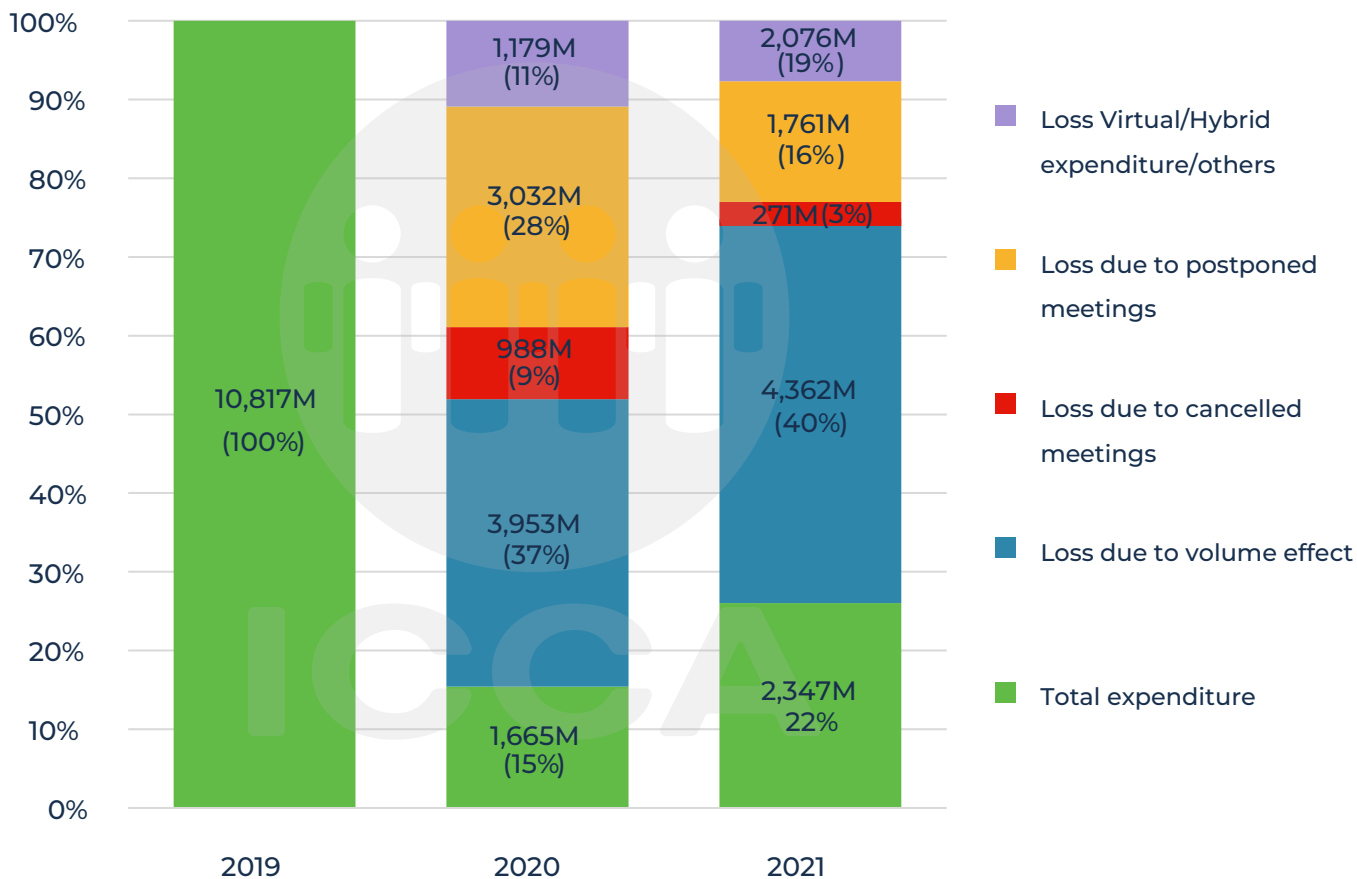
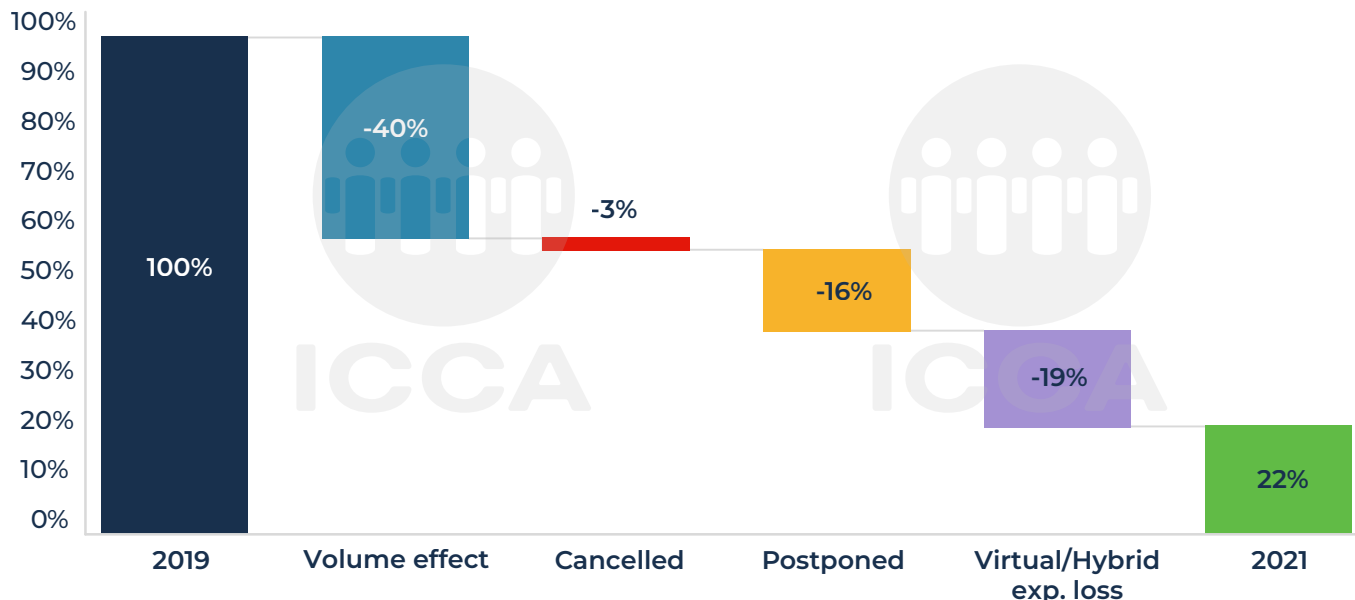
City	Hybrid	City	Digitalization	City	Bus
1 Lisbon	25	1 Lisbon	84	1 Vienna	92
2 Vienna	22	2 Vienna	83	2 Lisbon	91
3 Madrid	19	3 Singapore	72	3 Singapore	75
4 Jeju	17	4 Seoul	63	4 Athens	66
5 Athens	16	5 Tokyo	60	5 Seoul	64
5 Singapore	16	6 Prague	58	6 Barcelona	63
7 Seoul	15	7 Athens	56	7 Madrid	62
8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



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

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

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



Number of events 2020 vs 2021

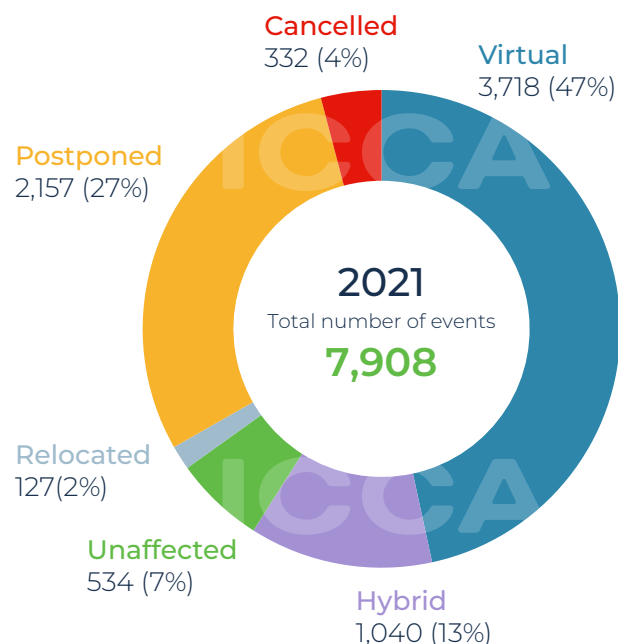
2021

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

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

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

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

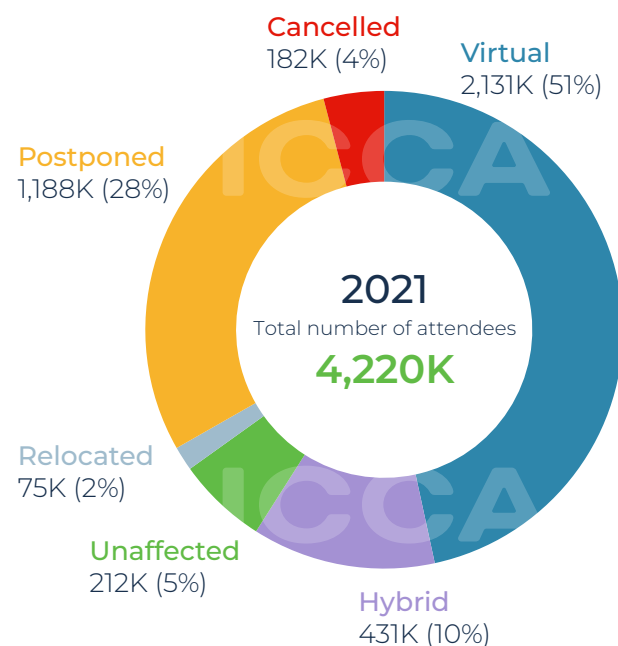


Number of attendees 2020 vs 2021

PAX

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

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



Number of attendees 2021

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

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



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