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BE>FUTURE

shaping the future of business events

Think Tank workshops Scenario Development Report

Deliverable 1.3

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Project information
Grant Agreement number: 101121580
Project name: Shaping the Future of Europe's Business Events sector through a regenerative, resilient and sustainable tourism industry transformation
Project acronym: BEFuture
Call: SMP-COSME-2022-TOURSME
Topic: SMP-COSME-2022-TOURSME-01
Type of action: SMP-GFS
Service: EISMEA/I/02
Project Duration and start date: The duration of the action is 30 months as of 16/09/2023

Partners:
Agència Catalana de Turisme (ACT) - (Spain)
B. Link Barcelona Strategic Projects Sl (B. Link) - (Spain)
Tipik Communication Agency Sa (TIPIK) - (Belgium)
Toerisme Vlaanderen (TVL) - (Belgium)
Linkeus (Linkeus) - (France)
Verband Der Veranstaltungsorganisatoren E.V. (VDVO) - (Germany)
European Tourism Futures Institute, Stichting NHL Stenden Hogeschool - (Netherlands)
Universita' Degli Studi Di Milano-Bicocca (UNIMIB) - (Italy)

Deliverable information :
Contact: jochem.jansen@nhlstenden.com
Deliverable Number: D1.3
Title of Deliverable: BEFuture Think Tank Reports
Version of Deliverable: 01 version
Date of Submission of Deliverable: 29/07/2024

List of accronyms

AI - Artificial Intelligence
AR - Augmented Reality
BAU - Business-As-Usual
BE - Business Events
COP - Conference of the Parties (referencing United Nations climate change conferences)
D - Deliverable
GDP - Gross Domestic Product
GDPR - General Data Protection Regulation
GNH - Gross National Happiness
GPI - Genuine Progress Indicator
GSTC - Global Sustainable Tourism Council
HDI - Human Development Index
IBTM - Incentives, Business, Travel, Meetings
Ibid - from Latin ibidem, meaning “in the same place”
IMEX - IMEX International Meeting and exhibition in Frankfurt
IoT - Internet of Things
ISO - International Organization for Standardization
JMIC - Joint Meetings Industry Council
ML - Machine Learning
MICE – Meetings, Incentives, Conferences and Events
MR - Mixed Reality
OECD - Organisation for Economic Cooperation and Development
SDGs - Sustainable Development Goals
SECON - Sustainable Events Conference
SMEs - Small and Medium Enterprises
SoA - State of the Art
SPI - Social Progress Index
TRANSITION PATHWAY - Not an acronym but capitalized; refers to strategic trajectories towards sustainability, innovation, and resilience in tourism.
TSD - Tourism Decarbonisation Scenario
TT – Think Tank
TTP - Tourism Transition Pathways
VR - Virtual Reality
XR – Extended Reality

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About BEFuture

BEFuture “Shaping the Future of Europe’s Business Events Sector” is a three-year project co-funded by the European Commission. The project lasts 30 months, starting on 16th September 2023 and finishing on 16th March 2026.

The BEFuture project aims to transform the European Business Events (BE) sector by driving it towards sustainability, inclusivity, and resilience. It will facilitate innovation and collaboration within the industry, support SMEs through an acceleration programme, and secure Europe’s future as a frontrunner in hosting environmentally and socially responsible corporate events.

BEFuture envisions an industry that not only thrives on innovation and technology, but also prioritises regenerative practices, ensuring a positive and lasting impact. The goals are to:

- Steer the business events sector towards a sustainable and inclusive future.
- Establish an open innovation space for ideas and knowledge exchange for the progress of the industry.
- Develop and empower talent within SMEs and the industry.
- Provide financial support to a minimum of 80 innovative projects across six European countries through a dedicated acceleration program.
- Utilise significant industry events (IBTM World, IMEX, and Mobile World Congress, etc.) to enhance communication and raise awareness.

BEFuture is set to address the pressing need for a sustainable transformation in the European business events sector, aiming to significantly reduce the industry's carbon footprint and waste production while ensuring inclusivity and positive social impacts.

During the project and its deliverables, the terms MICE (referring to Meetings, Incentives, Congresses and Events) and BE (Business Events) are used interchangeably.

1. Introduction

To transform Europe's Business Event' sector into a resilient, responsible, and futureproof industry, it needs to respond and adapt to many short and long-term challenges related to the acceleration of certain trends such as sustainability, digitalisation, and other geopolitical, social, and economic trends.

As was originally described in the project proposal the BEFuture project departs from the following:

- *More and more, Business Events are expected to be clearly aligned with sustainability principles across the entire range of products and offerings, and environmental targets are expected to be incorporated covering emissions, energy, and waste.*
- *Technological developments and digitalisation are dramatically changing the way people meet, share knowledge, collaborate, and do business. And new technologies are changing what BE will look like in the future, whilst data tools should enable a more comprehensive understanding of attendee needs.*
- *The industry is also facing a potential talent crisis due to their changing roles and people leaving the industry to work in other industries. And people working for the industry need different knowledge and skills to work with the newest technologies and innovations.*
- *From a user experience perspective there is an increasing demand for more meaningful engagement, more authenticity, more personalisation and social awareness. This is especially important for younger generations. Business Events thus need to become more experiential, focusing on engagement through interactive elements, activities, participation, co-creation and greater collaboration.*

Whilst such trends are leading to accelerated changes in the BE industry the need for in-person meetings is also being re-affirmed (see e.g. German Convention Bureau, 2024) . A 'business-as-usual' approach however will expectedly not be sufficient to be futureproof, given the sketched external context. Traditional event offerings will need to evolve and require reformulation, applying technology and innovation in relation to the trends described.

This report connects to activities that were undertaken in relation to two of the overarching specific objectives of the BEFuture project, which align with the above-described context:

SO1 *Create and promote an open innovation MICE ecosystem, interconnected across Europe, which ensures a broad stakeholder collaboration and engagement from across sectors (public, private, academia, and civil society), offering spaces for knowledge exchange, inspiration, and debate, and to experience and test innovations with positive impact.*

SO2 *Identify and define new scenarios for the future of Europe's BE, develop and collect knowledge and best practices in innovation for sustainability, legacy, and positive impact, and turn them into concrete actionable learnings for the benefit of the MICE industry and society at large.*

Specifically, this report is done in the framework of the BEFuture workpackage (WP) 1 and activity 1.3 which focusses on identifying and defining new scenarios for the future of business events. Through a series of think tank workshops, built around the scenario planning methodology, and by utilizing input from desk research and expert interviews, these future scenarios have been constructed. This report will further elaborate on this process and its findings and will conclude with an overview of potential implications. These in turn will serve as context and input for other components of BEFuture project, such as the development of a training programme, the identification of best practices, as well as a whitepaper on trends, developments, and the identified future scenarios.

2. Approach and methods

This document reports on the outcome of a series of workshops, desk research and expert interviews, used for the construction of possible future scenarios for the European BE industry. One think tank workshop was held in the context of the PCMA conference in Copenhagen in September 2023 and a second workshop was held in the context of IBTM, Barcelona in November 2023. A total of 12 expert interviews with event professionals from different parts of Europe, as well as desk research on BE related trend reports, further enriched the research process.

Strategic foresight and the scenario planning methodology

The overarching approach used was scenario-planning which connects to the methodology of strategic foresight, as it is applied by the European Tourism Futures Institute (ETFI) of NHL Stenden University.

Strategic foresight can be defined as the ability to take a forward view that enables action to be taken with reference to, and within the context of, the future. Strategic foresight is an open, participatory, and action-oriented process in which participants jointly map, discuss and shape their future, for example on the basis of a target image. The essence of strategic foresight is shown in the figure below.

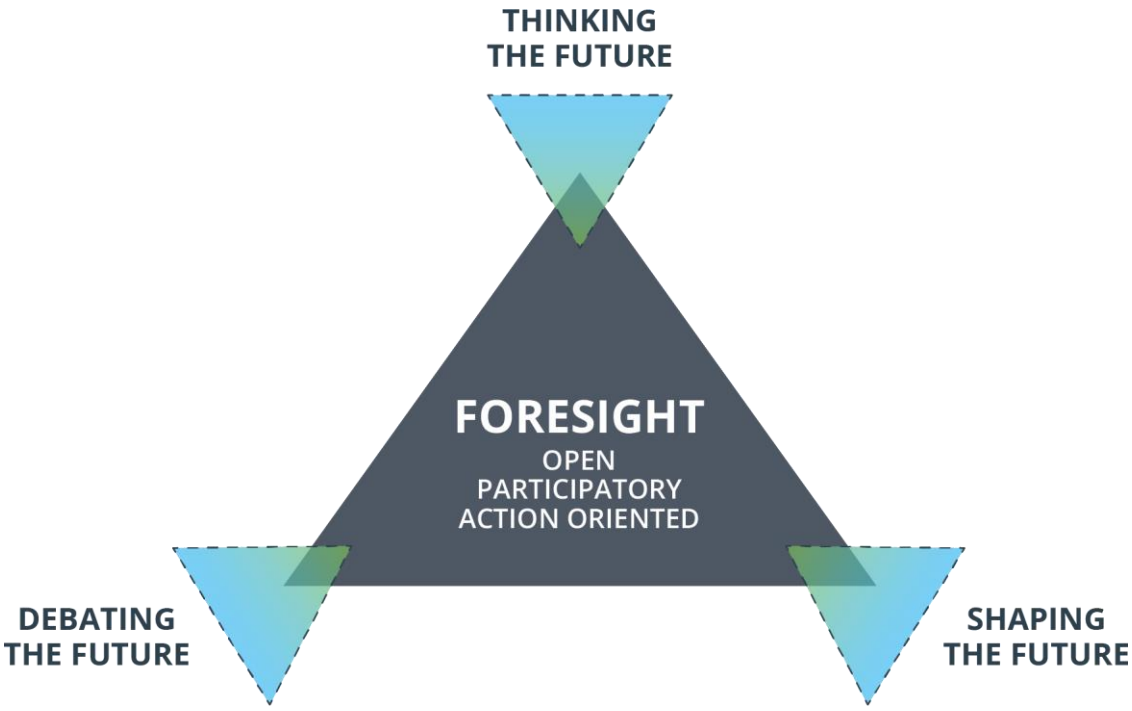

Figure 1: Strategic Foresight (adapted from: European Foresight Platform, N.D.)

Scenario planning is applied using a method in which knowledge exchange between involved stakeholders is central. It considers the longer term and the forces that could influence future developments. Strategic Foresight and Scenario Planning is also used by the Organization for Economic Co-operation and Development (OECD) (see *link*) and the European Commission (see *link*).

The explorative scenarios that are developed are not predictions resulting from e.g. trend analyses and (past) data, but vivid descriptions of what the future could look like. Scenarios are based on an

analysis of the driving forces behind a development, in particular of the main uncertainties involved. They offer a framework that challenges those involved, to think about and discuss opportunities and challenges that the future offers, and how to anticipate on this with innovative visions, concepts, revenue models or strategies.

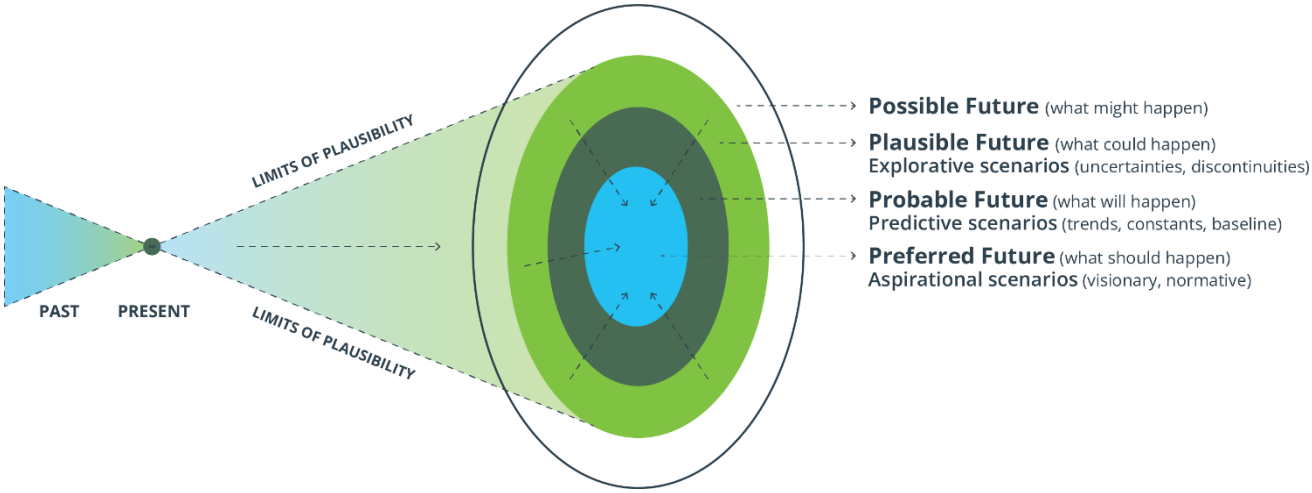

Figure 2: Futures Cone. (Adapted from Postma, Hartman & Yeoman, forthcoming Dec 2024, & Voros, 2017.)

The scenario planning process utilized consisted of the following phases shown in figure 3. In the findings chapter the outcomes per phase will be elaborated upon in detail.

Phase description
Preparatory phase: Formulating and delimiting the scenario question
Phase 1. Horizon scanning
Phase 2. Environmental analysis (patterns, processes, driving forces of change)
The base: model of the (complex adaptive) system
Phase 3. Analyse the driving forces of change and map their importance and uncertainty
Phase 4. Establish a “2x2” scenario framework
Scenario framework (scenario cross)
Phase 5. Scenario foundations: associations and ideas to fill the scenarios
Phase 6. Scenario development
Phase 7. Scenario implications

Figure 3: Scenario planning process, (Postma, Hartman & Yeoman, forthcoming Dec 2024)

More specifically the phases of the scenario planning process entail the following. This information is based on the forthcoming (December 2024) publication on the scenario planning process and method of the European Tourism Futures Institute (ETFI) by ETFI researchers Postma, Hartman & Yeoman.

Phase 1. Horizon scanning

Horizon scanning (also referred to as future scanning or environmental scanning) is about spotting early indications of developments that may become more important over the course of the research period. These may be indications of the changing power position of stakeholders, of unsolvable or seemingly unsolvable conflicts, of new plans or existing plans that may not go ahead, of innovative ideas, of new trends or counter-trends, of possible game changers or disruptive forces. The indications of imminent developments may relate to the macro-environment (demographic, economic, social,

technological, ecological or political developments), to the meso-environment (in the domain, sector, market) or to the micro-environment (such as specific services, products, start-ups, innovations).

Phase 2. Environmental analysis

1. The many observations from the previous step are clustered based on mutual coherence. This primarily concerns cause-effect relationships. Observations that evoke the same feeling or mean the same thing can also be grouped into the clusters. The clusters should be internally consistent and sufficiently different from each other, without overlap.
2. If necessary, clusters should be split and/or merged. Ultimately, each cluster represents a process that influences the development of the domain in the agreed time frame.
3. The final step is to determine the driving force of each of these processes.

The environmental analysis can result in driving forces in the macro or contextual environment (e.g. demographic, economic, social, technological, ecological or political developments), in the interactional or meso-environment (e.g. the domain, sector, market) and/or in the internal or micro-environment (e.g. related to specific services, products, start-ups, innovations.

Collaboratively a driving force is identified that fuels the process in the cluster. The label of the cluster is not a theme, but a force that points at change and drives the change. Eventually the process leads to collaborative understanding of the relevant part of the external environment and how it operates.

Phase 3. Interpreting the dynamics of the driving forces.

The first step in the interpretation of the driving forces is to explore in which two extreme, but plausible directions the underlying process of each force could develop during the study period. These extremes define the ‘limits of the plausible’. The driving forces are then positioned in an uncertainty x impact matrix (see figure 5). They are ranked relative to each other according to the degree of impact on the domain and the degree of unpredictability/uncertainty. The bottom part of the plot shows the driving forces that are of secondary importance. At the top left are the driving forces that are of great influence and are relatively predictable or certain in their future development. These are the core certainties. At the top right are the *key uncertainties*, which are the driving forces that are expected to have a major influence, but whose development is extremely uncertain.

To create explorative scenarios, we begin by identifying two key uncertainties. These two key uncertainties are selected as the two dimensions on which the scenarios will be built. The driving forces that have not been chosen as dimensions for the scenario cross will be used to fill the scenarios with content.

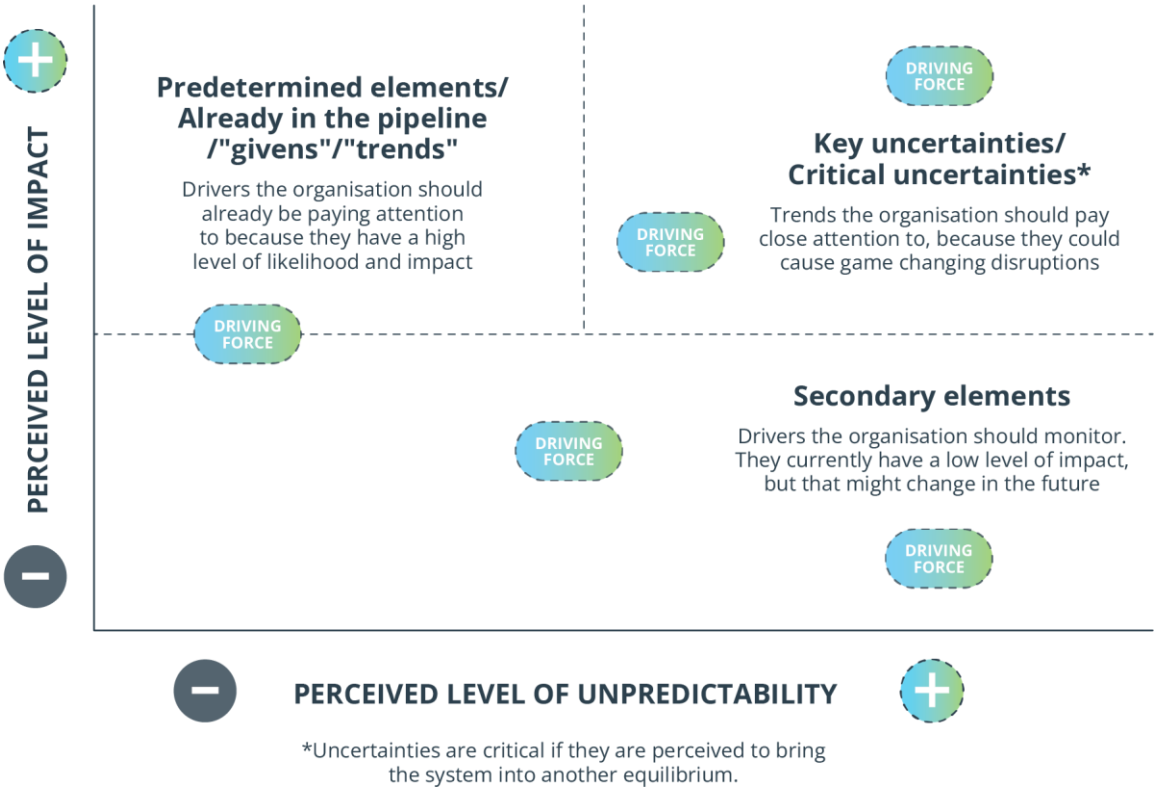

Figure 4: Impact x Uncertainty Matrix. (Adapted from Postma, Hartman & Yeoman, forthcoming Dec 2024)

Phase 4. Establish the scenario cross

The two key uncertainties that were selected form the basis for the exploratory scenarios to be developed. These two dimensions with the extremes are placed in a scenario cross (see fig. 5).

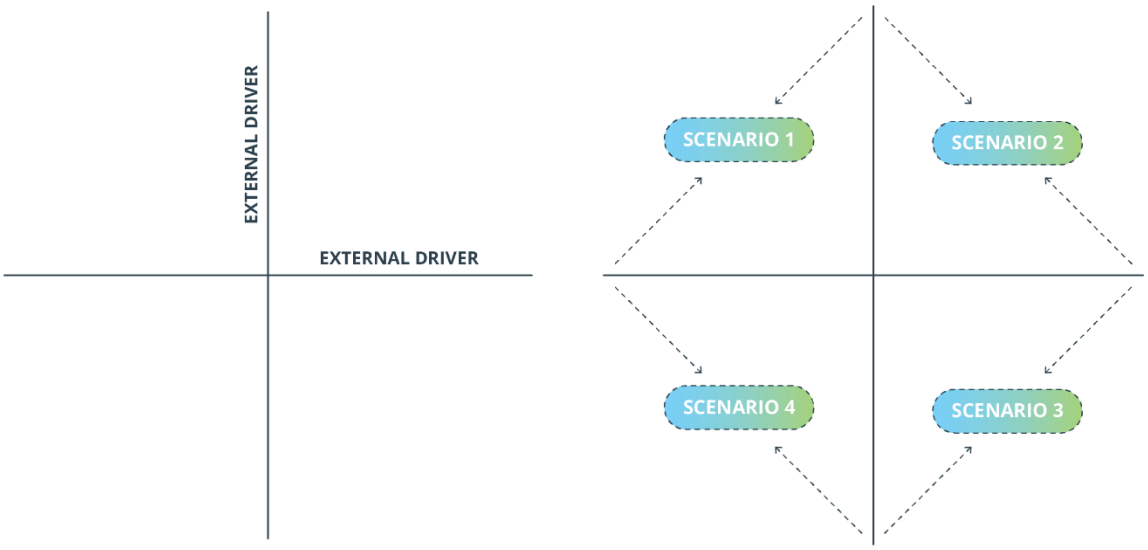

Figure 5: Scenario cross, adapted from (Postma, Hartman & Yeoman, forthcoming Dec 2024)

Phase 5. Scenario foundations

The scenario cross is the framework of four scenarios. Each scenario is framed by the combination of two extremes. These scenario's need to be filled with ideas. The scenarios should be out-side-the-box, they should exceed the borders of our imagination, and break out of dominant thinking. The givens that were positioned in the left upper corner in the impact by uncertainty matrix in phase 3 are perceived to remain in the future, no matter which of the scenarios will evolve. These can be used as inspiration for filling the scenarios with ideas and context. The way in which the givens are expressed in the four different contexts may be different.

Phase 6. Scenario development

Once the scenarios are all filled with thoughts and associations, they need to be revisited to find a title for each that represents its core and goes well with the other titles. The scenarios (narratives) are then further constructed using a structured or unstructured (inductive) approach and (ideally) visualized in one way or another. The scenarios are not a goal by itself, but serve as the means to inspire strategic decision-making. The scenarios should have no overlap, go beyond dominant thinking and therefore be surprising, appealing, and plausible considering the end of the period under investigation. A plausible scenario presents a future that is imaginable, or an imaginable and logical outcome of a consistent chain of events.

Phase 7. Scenario implications

The first step in the development of new strategies is to consider the implications of each scenario. This can be done by constructing implication trees. Several essential features of each scenario are identified and then direct and indirect implications considering these features are mapped. It is important these implications focus on what could possibly happen if the scenarios would come true and to not be inhibited by the present and what may not be possible.

3. Findings and Outcomes

3.1 Think Tank workshop PCMA, Copenhagen 20-09-2023

During the first think tank workshop 27 strategic experts from the European Business Event sector contributed to mapping the most urgent, uncertain and impactful (external) developments facing the European Business Events industry in the coming 10-15 years.

The aim of the session was twofold:

1. To collect input from expert stakeholders to identify key driving forces that will cause a change in the Business Event industry between now and 2035;
2. To collect input from these experts for the mapping of the European Business Event 'eco-system' of stakeholders.

This session represented a first step in a series of steps related to the development of future scenarios. It focused on collecting initial input from expert stakeholders for the first 2 phases of the scenario planning process.

3.1.1 Horizon scanning and environmental scanning

The participants of the Copenhagen Think Tank workshop were divided into 5 groups to discuss their observations and select the most important ones. The observations selected by the groups were placed on the wall with explanations. The participants then clustered them based on assumed cause-and-effect relationships. Each cluster represents a process driven by a so-called 'driving force of change' (see figure 6). As a final step the participants 'voted' for the drivers of change they expected to have the most impact, and they also voted to indicate the forces they found most uncertain.

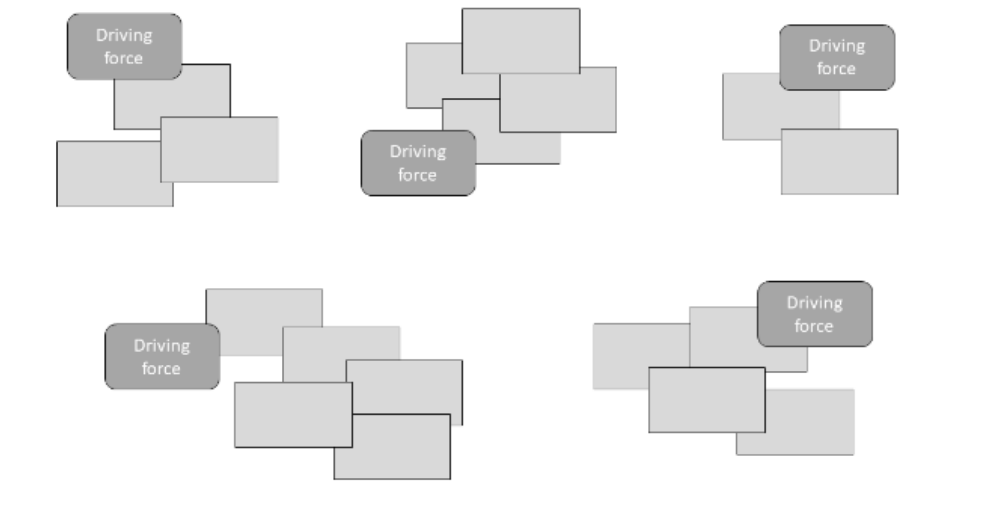

Figure 6. Visualisation of driving forces identification (adapted from Postma, Hartman & Yeoman, forthcoming Dec 2024)

The main outcomes of the mapping of the observations can be found in the visualizations in appendix 6.1. This represents the outcomes of the sub-group discussions, which were then placed on the wall to get a full overview of all the sub-group discussions.

3.1.2 Clustering and highlights of the discussion

The participants were then asked to start clustering the observations, based on mutual coherence and assumed cause-and-effect relationships. Participants were asked to explain their choices for the clusters in order to reach coherence in the group. Some observations and clusters led to extensive discussions on meaning and understanding, degrees of impact and degrees of uncertainty towards these external forces. Notes were taken during this discussion to shed further light on the clusters that were ultimately derived from these discussions (see appendix 6.1 and 6.2). The clusters that were identified are as follows (in random order). Each cluster represents a process driven by a so-called 'driving force of change'.

Community seeking sense of belonging

This cluster represents observations towards the continuous need for sense of belonging and community formation. As networking is a key objective in the industry, familiarity and trust is essential. Furthermore, participants are longing, more than ever, to personal touch, connectedness, and togetherness. These developments were discussed in light of the continuous trend of online and virtual meetings, with a clear statement made that ‘live’ will remain irreplaceable.

Movements & conscious travel

Travel to and from on site is discussed to have the most impact in the near future. Organisations are moving towards policies and regulations for employee travel behaviour to decrease their carbon footprint. At the same time, behaviour of individuals remains dominated related to time and money-saving decisions. Trains are considered to take a leading role and cater to connect top conference destinations with an increase in the offer of night jets.

Green transition

Innovations to recycle, reuse and decrease are identified in the food, hospitality and leisure offerings. Measuring events footprints and certifications, rules and regulation surrounding these developments are considered challenging but inevitable.

Rise of the digital twins

Digital twins are seen as promising innovations to facilitate virtual meetings, conferences and exhibitions. Discussions revolved around the use and design of avatars to virtually attend, and the possibilities and restrictions of virtual twins to explore and discover. These developments were critically discussed in the light of the definition and perception of 'live', that seemed to be differently interpreted per generation. Effects on the business model were considered a key concern.

AI as facilitator / Artificial Intelligence (AI) & content / AI as threat

The input and discussions on AI highlighted the uncertainty and the knowledge gap of AI, which is seen as a disruptor that could have great impact on the industry. Hence, it also represents an uncertain factor. How will it further influence the industry? How can it facilitate current processes, be utilized for content creation, and to what extent will it be a threat, e.g. from an experience, skills and human resource perspective?

Technically assisted experiences

The experience of the end user is considered to remain a focal point within the sector, where again discussion arose on how and if technical applications replace, enhance or reduce the live experience of the attendee. The increasing demand of consumers as well as the rapid developing tech opportunities to facilitate these experiences are discussed.

Unnamed clusters

Some clusters remained unnamed still during the session and driving forces were not fully determined for these. These represented clustered observations in the context of politics and geopolitical pressures, shifts and developments; economic uncertainty and revenue and business models; and COVID-19 and (future) pandemics (although only a few).

Ideally, a further round of discussion and clustering, as well as discussion regarding the driving forces would have taken place. Due to time limitations, this was not possible during this session. Therefore, further actions were taken to enrich and validate these outcomes before moving to the next step of the scenario planning process. These consisted of additional interviews and desk research. This is further elaborated upon from section 3.1.7 onwards.

3.1.3 Impact and uncertainty voting

During the session participants could vote on the initial clusters to get a sense of what the participants perceived as the forces/clusters that would have the *most impact on the future of the industry* and which ones were perceived as *most uncertain*, following the discussions that took place. The unnamed clusters were not or hardly voted upon. The result of this voting is given in the figure 6 below, with the numbers representing the total votes per category.

	Uncertainty / Unpredictable	Impact
Community	7	11
Rising costs		1
Lack of innovation		1
Movements	2	3
Green transition	3	15
Climate crisis		6
AI as facilitator	2	8
AI & content	6	4
AI as threat	17	1
Change of values	9	19
Digital Twin		15
Experience	2	1

Figure 7. Outcomes Impact and uncertainty voting for preliminary Impact*Uncertainty matrix.

3.1.4 Environmental analysis

The overall initial clusters were taken as the foundation to further organize the input that was gathered in the sub-group discussions. All the input was further clustered based on mutual coherence and considering cause and effect relations, following the discussions and notes taken during the session (See appendix 6.2).

Following a similar approach, this new overview of clusters and subsidiary observations was further analysed considering the (potential) overlap between clusters. Clusters need to be sufficiently independent to determine and separate the driving forces for each cluster. The clusters that were merged, or adapted in terms of the driving force for this cluster are as follows:

Further development of AI technology and its widespread utilization

The discussion in the plenary session heavily focused on AI, partly due to some strong opinions and input by some participants. In the smaller group discussions, different topics were considered more significant. Therefore, was foreseen useful to investigate, and validate these insights in the next Think Tank and through additional expert interviews. It did become clear that this was a pressing topic, hence for this reason it is also beneficial to gather more input on this from experts in that area. There is a knowledge gap on the potentials of AI in general, its future development, and the possibilities (and constraints) for the BE industry. In both areas, additional expertise is needed. What became clear in the discussion is that developments in AI technology and how this will, or could become more widespread in terms of utilization, requires a response from the industry. As this could potentially be disruptive both in terms of the threats this technology can bring and/or how it could be used as a facilitator for e.g. processes and content creation these three initially distinct clusters have been combined and labelled as 'AI technology development and its widespread utilization' as the driving force.

Shifting experience expectations following digitalization and hybridisation

Developments on tech and AI, applications, hybridisation, gamification and the metaverse were discussed which may influence the future market, also in terms of (expected) experience. Offline experiences, emotions and human interaction were mentioned to remain key drivers in the business event experience journey. The development of this human experience either contrasting with, or enhanced by the digital context, will be shaped by new generations. Further research identified the need of value-led segmentation and catering to values, passions, convictions and attitudes, which is the way to reach this new generation (Trendwatching, 2023). Generation Z will dominate the future labour and consumer markets and these digital natives shall influence the design of events even more. This hypercognitive generation (Francis & Hoefel, 2018) expects on-demand content that is delivered via various channels simultaneously integrating virtual and live experiences. They expect to co-create content and be addressed as unique consumers without any limitations or boundaries. For them, a live connection can take place in any reality, anywhere at any time. Emerging technologies will offer significant opportunities to enhance and transform the attendee experience in ways that traditional live events never could. "We need to avoid falling into the trap that the metaverse is a gimmick and look at how it can supplement what we do" (Nick Fagan, in IBTM World Trends Report 2023, (Turner, 2023)).

Business models that drive these new developments are considered a threat as well as an opportunity, with possibilities to improve efficiency by the use of applications, big data and AI.

Green transitions

Shifting values and new generations demand emission-neutral events and travel. However, who gets to pay the bills for these new business models remains uncertain. Event organisers and venues will need to justify their footprint and European legislation is developing rapidly. Organisations may be tempted to resolve to green washing. Transparency in resource allocation, impact measurement and is considered key for trustworthiness. While the festival industry is leading by example, business events seem to lack innovation power. As also stated in the IBTM Worlds Trend Report 2023 (Turner, 2023)) there is a need for more to be done and action to be taken quicker by the meetings and events community and to go beyond pledges and good intentions.

Green commitment is of key concern. 'EU countries are committed to achieving climate neutrality by 2050, delivering on the commitments under the Paris Agreement. The European Green Deal is the EU's strategy for reaching the 2050 goal'.

Change of (generational) values systems

New generations as well as (governmental) initiatives showcase the growing importance of nature and environmental protection. The rising voices of residents and citizens taking back control led to local initiatives facilitated by governmental policies;

Europe has set ambitious policy goals to allow nature to recover and flourish. Creating protected areas, green and blue infrastructure, restoring ecosystems, rewilding and facilitating nature-based solutions to climate change can all contribute to reversing biodiversity loss in the EU (European Environmental Agency, n.d.).

For events 'hub and spoke' meetings may (need to) become more popular. "Whereas previously the focus would be to bring guests to a premium destination, city, or resort, now there are teaser experiences with more local destinations, potentially leading up to a central gathering" This fragmentation means more tailored messages and itineraries for the guest, but also longer resonance - IBTM World Trend Report 2023, (Turner, 2023).

Citizens take back control with a tilting of distrust towards the government. The increasing disbalance between rich and poor leads to public criticism. 'The global "top 1%" generates more emissions than the bottom half of the world's population. Experts revealed that a country's emissions gap between the rich and the poor is now more significant than the differences in emissions between countries' (Igini, 2023). A revolt against travel can be set against the backdrop of the existential growth of the flight industry).

Shifting value systems may also influence the ways communities are shaped. Developments in the perception towards genders affect the approach of marketing and telling the story of events. Contrasted to these developments is the stagnation or even the degeneration of inclusion and diversity norms in traditional countries. Forming communities around and loyalty towards events is not only influenced by the shaping of virtual communities but also by shifting values based on equity and inclusion.

Shifting travel routines

The movement of attendees is a pressing concern within the business events industry, as 70%-90% of CO_{2eq} emissions at events consist out of travel (ClimateTrade, 2023). Electrification, social sharing and the rise of trains offer potential solutions. The concerning growth in volume and demand for flights stands in contrast with the rapid innovation developments in the aviation industry.

The aviation sector is growing fast and will continue to grow. The most recent estimates suggest that demand for air transport will increase by an average of 4.3% per annum over the next 20 years. By mid-2030s no fewer than 200,000 flights per day are expected to take off and land all over the world (International Civil Aviation Organization (ICAO), n.d.).

Engines and aircraft become lighter, quieter and more efficient. Emerging technologies are reshaping with robotics, artificial intelligence, the internet of things, unmanned aircraft systems and the push for hybrid and electric airplanes. Alternative fuels can significantly change the current scenario of aviation in support of environmental protection. The vast investment in Artificial Intelligence (AI) and Big Data

could be seen as a promising way of increasing safety, efficiency and sustainability. These technologies can help improve aviation infrastructure and airspace utilization (International Civil Aviation Organization (ICAO), n.d.).

Movement of tourist is influenced by the phenomenon of Bleisure (combining business with leisure), that is expected to take over traditional business travel with 89% of travellers stating to plan to add personal vacation time to their business (Forbes, 2022). Purpose-driven travel to enhance emotional and physical well-being dominates both business and leisure travel.

Engaging and nurturing talent

New talent development has risen with a current offering of 220 Event Management courses worldwide. Changing work environments and digital nomading shape how we learn, but also what future talents look for in job environments. Intradisciplinary working and synergies across sectors demand talent with 21st century skills. Developments of automatization, blockchain co-sharing and robot jobs leads to a war for talent and Human Resources (HR) challenges in keeping talents engaged.

The way we learn will influence and reshape conference design and the experience of attendees:
Research and Markets predicts that the global online education market will grow by over 10% annually between 2021 and 2026. The global market for Virtual Reality (VR) in education has grown at an annual rate of over 58% in the last few years. This growth is due to the increasing demand for immersive learning experiences and the declining cost of VR and AR (Augmented Reality) hardware. One of the most exciting applications of VR/AR technology in education is the ability to take students on virtual field trips. This allows students to visit places that would be difficult or impossible to access in real life, such as the surface of Mars or the depths of the ocean. It can also help to bridge cultural and geographical gaps, allowing students to experience different cultures and ways of life (Shabbir, Rafia, n.d.).

Adapted impact/uncertainty overview

The result of the adjustments made to the initial clustering is given in figure 8 below.

	Uncertainty / Unpredictable	Impact
Shifting travel routines	2	3
Green transitions	3	21
Development of AI technology and its widespread utilization	25	13
Changing value systems	16	30
Shifting experience expectations following digitalization and hybridisation	2	16
Engaging and nurturing talent		

Figure 8: Impact*Uncertainty matrix: the participant's perceived degree of unpredictability/uncertainty and degree of impact of driving forces of change on the future of the BE industry until 2035. (further analyzed and enhanced by consortium)

Follow-up interviews with experts from the BE industry and desk research was used to enrich and extend upon the workshop outcomes results and to validate the conclusions. This is discussed in more detail under 3.1.5.

3.1.5 Stakeholder Eco-System

The second objective of this think tank workshop was to gather input from the participants regarding *the mapping of the European Business Event 'eco-system' of stakeholders*.

Participants were asked to write down as many key stakeholders from within and outside of the BE industry, considering organizations, initiatives, as well as more general types of stakeholders that would need to be considered for the mapping of this ecosystem. This resulted in an extensive and rich overview of input from the participants. The results fed into the construction of the map of innovation stakeholders, which was reported in deliverable 1.1 under work package 1 of the BEFuture project. These results were combined with the database construction of key stakeholders and the further ecosystem development steps that will be taken.

3.1.6 Further steps

The outcomes of the first workshop with industry stakeholders were further enriched and validated through additional interviews with experts and industry professionals. The results of this are presented in the next subchapter.

Building on this, the next steps of the scenario planning process focused on determining the dynamics of the identified driving forces (phase 3) and the development of initial scenarios. These served as the departure point for the second think tank workshop that was held in this context. This will be further discussed under chapter 3.3.

3.2 Interviews and follow-up desk research

As part of the BEFuture project's comprehensive approach to reimagining Europe's Business Events (BE) sector, a crucial phase involved conducting targeted interviews with industry experts. The consortium members engaged with 11 experts from various facets of the Business Events industry, each bringing a unique perspective rooted in frontline experience (see figure 9). This initiative was undertaken with the objective of validating and enriching the insights gathered through extensive literature reviews. The primary aim of these interviews was to ascertain whether the theoretical findings and projections about the industry's direction align with the real-world experiences and expectations of those actively shaping its future. By integrating the practical insights from these interviews with the foundational knowledge acquired through desk research, the project seeks to ensure that its strategies and recommendations are both grounded in current realities and attuned to the evolving needs of the sector. This alignment between theory and practice is essential for steering the European BE sector towards the envisioned future of sustainability, inclusivity, and resilience.

The interviews for the BEFuture project were meticulously conducted in the last quarter of 2023, focusing on a diverse group of participants from the Business Events (BE) industry. This group comprised Academics, Entrepreneurs, and Business Event managers, all of whom possess extensive knowledge and experience within the sector. Their insights were instrumental in verifying the theoretical frameworks and assumptions derived from earlier phases of the project.

1	Anonymous - Startup and Venture capital specialist in business events sector
2	Anonymous – Representative of Eventoplus
3	Anonymous - Representative of Surrey University, expert in sustainability
4	Maddalena Chiellini - (Association Segment Developer) and representative Convention Bureau Italia
5	Albert Plana -CEO of NEBEXT
6	Anonymous – Innovation consultancy, SME startup coach and specialist
7	Ángeles Moreno - Country Manager at AIM Group
8	Anonymous – Representative of the Group Comexposium
9	Zakaria El Asri - Chief Innovation Officer at GL Events
10	Jordi Herreruela - Director of Festival Cruïlla,
11	Tobia Salvadori - Director Convention Bureau Italia

Figure 9: Experts interviewed to gather verifying and enriching the desk research for the scenario planning process. Experts mentioned comply with data protection.

Following the interviews, a structured approach was adopted to analyze and synthesize the data collected. This process involved:

Codification: The interviews were systematically coded to identify recurring themes and insights. This step was crucial for organizing the vast amount of qualitative data obtained.

Clustering: Observations from the interviews were grouped based on their mutual coherence and the underlying cause-and-effect relationships. This method facilitated a structured analysis of the data, enabling the identification of key trends and driving forces within the industry.

Discussion and Refinement: Participants engaged in discussions to refine the clusters, aiming for a consensus on their significance and implications. These deliberations were essential for ensuring the coherence of the findings and for identifying areas requiring further clarification.

The primary clusters identified through this process, listed in no particular order, encompass several driving forces of change within the BE industry:

- Community & Sense of Belonging
- Movements & Conscious Travel
- Green Transition
- Rise of Digital Twins
- Artificial Intelligence (AI): Facilitator, Content Creator, and Threat
- Technically Assisted Experiences
- Unnamed Clusters reflecting ongoing uncertainties and emerging trends.

These clusters were tested as main topics in the interviews trying to assign a sentiment to the way that the theme provokes in the interviewee.

Given the detailed nature of the interview and the request, the analysis involved identifying sentences that align with the primary clusters previously discussed, as well as detecting any new themes that emerged from the conversation. Additionally, the sentiment of each statement (desirable or undesirable) was assessed based on the interviewees' perception on the topics. Due to the complexity of the task, only a subset of responses was analysed for illustration purposes.

Overall clustering

After an accurate analysis it was added Business and Economy as a new clustering because it was a recurrent theme not directly related to other clusters even unnamed.

Primary Clustering	Occurrences in interviews
Green Transition	32
Technically Assisted Experiences	29
Unnamed Clusters reflecting ongoing uncertainties and emerging trends.	28
Community & Sense of Belonging	22
Artificial Intelligence (AI): Facilitator, Content Creator, and Threat	19
Movements & Conscious Travel	7
Rise of Digital Twins	7
Business and Economy	7

Figure 10: Primary clusters and occurrences in interview outcomes

The Unnamed Clusters detected and the related sentiment:

Other Clusters in interviews	Sentiment
Unnamed Cluster: Corporate Influence on Events	Neutral
Unnamed Cluster: Market Dynamics and Exit Strategies	Undesirable
Unnamed Cluster: Generational Shifts in Business Approaches	Desirable
Unnamed Cluster: Generational Differences	Neutral
Unnamed Cluster: Data Utilization	Undesirable
Unnamed Cluster: Event as Content Generator	Desirable
Unnamed Cluster: Time and Choice Overload	Undesirable
Unnamed Cluster: Resistance to Change	Undesirable
Unnamed Cluster: Online Engagement Challenges	Undesirable
Unnamed Cluster: Technological Potential for EDI	Desirable
Unnamed Cluster: Misuse of Technology	Undesirable
Unnamed Cluster: Remote Work Perception	Undesirable
Unnamed Cluster: Innovation through Risk-taking	Desirable
Unnamed Cluster: Impact Assessment Deficiency	Undesirable
Unnamed Cluster: Tradition vs. Innovation	Undesirable
Unnamed Cluster: Multidisciplinary Expertise	Neutral
Unnamed Cluster: Political Influence on Innovation	Neutral
Unnamed Cluster: Democracy and Innovation	Desirable
Unnamed Clusters reflecting ongoing uncertainties and emerging trends	Neutral
Unnamed Clusters reflecting ongoing uncertainties and emerging trends	Undesirable
Unnamed Clusters reflecting ongoing uncertainties and emerging trends	Desirable

Figure 11: Other clusters in interview outcomes and sentiments towards them

Overall Sentiment

Sentiment	Occurrences in interviews
Desirable (positive)	101
Neutral	19
Undesirable (Negative)	31

Figure 12: General sentiment future of Business Event

The data synthesized from the interviews provides a comprehensive view of the sentiments and expectations of European experts regarding the future of Business Events (BE).

Primary Clustering Insights:

- **Green Transition** dominates the discussion, suggesting a strong collective push towards sustainability. This indicates an awareness of environmental impact and a desire for the BE industry to lead by example in ecological responsibility.
- **Technically Assisted Experiences** follow closely, reflecting the industry's eagerness to adopt new technologies that can enhance event experiences. This is in line with the global digital transformation trend.
- **The importance of Community & Sense of Belonging** emphasizes the fundamental human need for connection and interaction, which events serve to fulfill.
- **Artificial Intelligence (AI) and the Rise of Digital Twins** show that there is an interest in exploring how AI can facilitate, create, and potentially disrupt within the industry. However, there's also caution, reflecting the industry's uncertainty about the full implications of AI.
- **Movements & Conscious Travel** indicate a balance between the desire for travel and in-person connections with the conscientiousness about the environmental and societal impact.
- **Business and Economy clusters** highlight the economic considerations and the necessity of ensuring that BE activities are not only sustainable but also economically viable.

Sentiment Analysis

The overwhelming majority of sentiments are desirable (101 occurrences), showing that despite challenges, there's a positive outlook on the potential for growth and innovation.

A significant number of statements were neutral (19 occurrences), suggesting that many experts are taking a wait-and-see approach, possibly due to the ongoing uncertainties in the global economic and political climate. Undesirable sentiments (31 occurrences) mostly relate to the apprehensions around the pace of sustainable transition, the effectiveness of new technologies, and the risks of not adapting quickly enough to the changing landscape.

Final Comment

The insights gathered indicate that European experts are optimistic about the future of Business Events, albeit with a pragmatic view of the challenges ahead. There's a clear recognition of the need for sustainable practices and the adoption of technology to enhance the event experience and industry operations. However, the engagement with new technologies like AI and digital twins is cautious, with a desire to balance innovation with preserving the human touch that is central to the community and sense of belonging.

The data suggests that while the BE industry is poised for transformation, driven by sustainability and technological advancement, there's also a need for continuous learning, adaptability, and alignment

with global trends. The insights also reflect an understanding that while events must be economically viable, they should not compromise on creating a positive legacy in terms of environmental and social impact.

In conclusion, the future of Business Events in Europe looks dynamic and promising, with a clear shift towards sustainability, technology integration, and maintaining the essence of human connection that defines the industry.

3.2 Think Tank workshop IBTM, Barcelona 28-11-2023

The first think tank workshop at PCMA Copenhagen focused on collecting input from expert stakeholders for the first 2 phases of the scenario planning process. Phase 3 and 4 were worked on in preparation for the second workshop at IBTM, by building upon further desk research and interviews with key experts.

Based on these outcomes, the key driving forces of change were placed in a scenario cross and, using the co-created outcomes of the previous phases, preliminary storylines were developed. A total of 48 participants joined the second workshop, representing different backgrounds and expertise such as sustainability, (immersive) technology, Business Event organisation, (business) tourism and more.

The main aim of the second think tank workshop was:

To define the future scenarios for the Business Events of 2035 by finalizing them in a co-creative multi-disciplinary setting with high-end experts from relevant industries. It connected mostly to phase 5-7 of the scenario planning process.

Phase description
Preparatory phase: Formulating and delimiting the scenario question
Phase 1. Horizon scanning
Phase 2. Environmental analysis (patterns, processes, driving forces of change)
The base: model of the (complex adaptive) system
Phase 3. Analyse the driving forces of change and map their importance and uncertainty.
Phase 4. Establish a “2x2” scenario framework
Scenario framework (scenario cross)
Phase 5. Scenario foundations: associations and ideas to fill the scenarios
Phase 6. Scenario development
Scenarios (storylines)
Phase 7. Scenario implications
Phase 8. Opportunities and threats of the scenarios
Phase 9. Strategic options that bridge opportunities and threats

Figure 13: Overview phases scenario planning, (Postma, Hartman & Yeoman, forthcoming Dec 2024)

3.2.1 Preparatory phase - formulating and delimiting the scenario question

The workshop consisted of two rounds. First the participants discussed the scenario storylines and then enhanced these with further ideas, and they provided feedback upon how these were perceived. In the second round the potential implications, both from a positive (desirable) and undesirable perspective, were discussed. The discussion groups were formed so experts representing different backgrounds were present in every group. In both rounds each group of approximately 6-8 participants discussed two diagonally opposing scenarios from the scenario cross (i.e. either scenario 1 and 3, or

scenario 2 and 4). Each group also consisted of one discussion leader and a note taker, which were both members of the BEFuture consortium.

In round 2 the table discussions led to an overview of the desirable implications and undesirable implications of each scenario. At the end everyone was asked to score the 3 most desirable and most undesirable ideas in each scenario from the perspective of the organization/background they represented. This resulted in a list of implications as perceived by the participants, considering the further development of certain external driving forces towards 2035 and their potential impacts for the industry.

In the following (sub) chapters, the development of the four alternative scenarios will be discussed in detail, as this formed the foundation of the second workshop. After this, the workshop's outcomes will be elaborated on.

3.2.2 The base - model of the complex adaptive system

The driving forces that were determined under phases 1 and 2 were positioned in an impact-uncertainty matrix. This was based on the degree of impact and uncertainty, as perceived by participants of the first think tank workshop and further analysis of the workshop output, interview data and desk research afterwards.

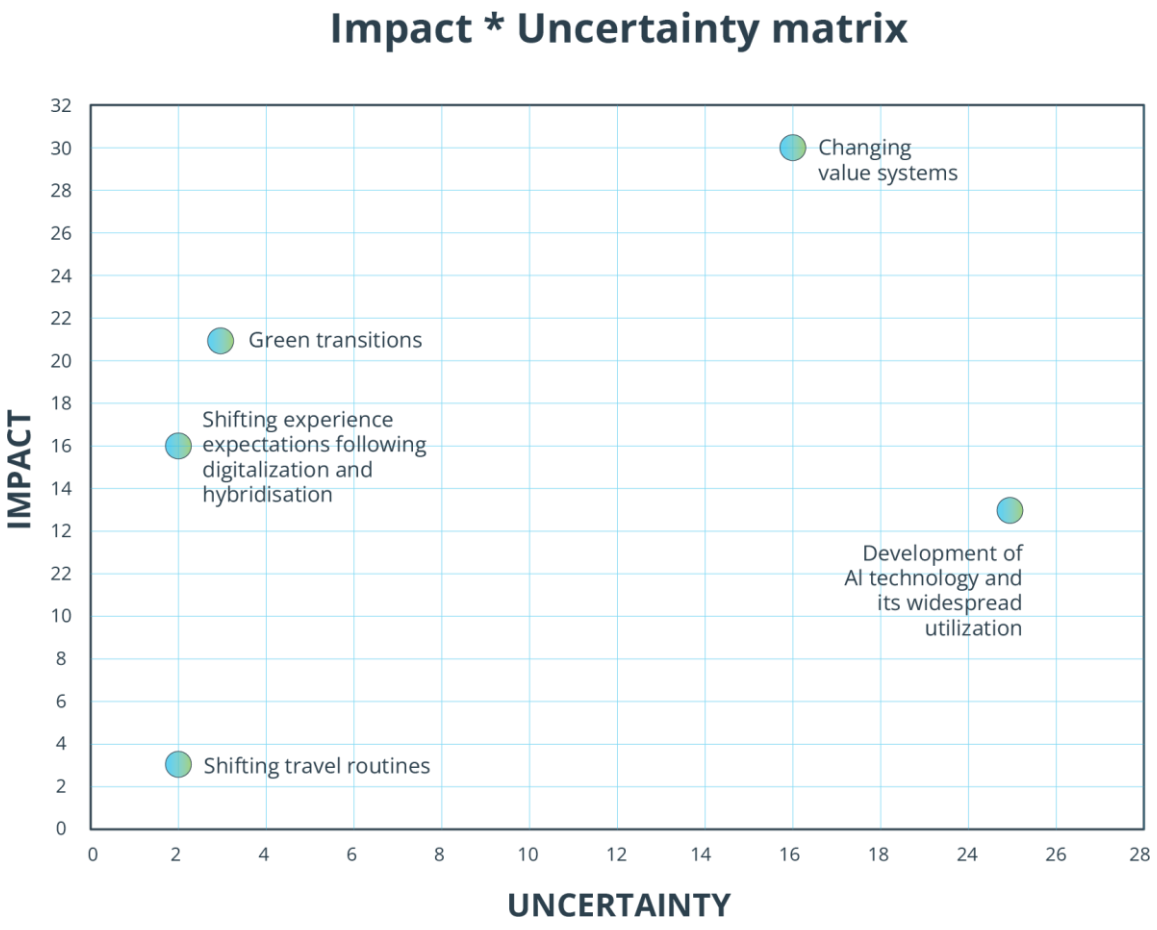

Figure 14: Impact * uncertainty matrix filled in.

Driving forces: limits of plausibility

Each of the driving forces fuels a process. These processes have a development direction that can lead to different outcomes due to the dynamics of society, the BE industry and the experience economy. Scenario planning is about limiting the uncertainty margins of those developments with two plausible extremes. Plausible means that, reasoning from the present, we could arrive at that extreme during the study period, i.e. 2035. The greater the uncertainty surrounding a driving force or process, the further apart those extremes will be. Based on all the gathered data the following extreme development directions were identified.

Plausibility limit	Clusters	Plausibility limit
Limited willingness to travel for BE purposes, air travel bans/regulations in BE contexts	Shifting travel routines	More sustainable train travel becoming cheaper, accessible, and advanced (faster)
Strong enforcement	Green transitions	Laissez-faire approach
Socially exclusive (tribes, select groups, localized	Changing value systems	Socially inclusive (accessible for all)
AI as threat	development & utilization of AI	AI as facilitator
Shifting perception of the reality; What is 'live', and how authentic is it	shifting experience expectations	Unique and live experiences (F2F)
Hybrid hub and spoke. (Central+satellite events; hyperlocalisation)	Immersive tech development and utilization	Fully Virtual (Digital twin; Metaverse)

Figure 15: Limits of plausibility and development directions of each driving force.

Key uncertainties

Scenarios can serve as tools to assist in dealing with uncertainties that will confront us in the future. Therefore, it is common to use the driving forces with the most influence and the greatest uncertainty for framing the scenarios. These are the so-called key uncertainties. In figure 8 these are at the top right corner.

'Changing value systems' clearly is seen as a key uncertainty. For the second key uncertainty we need to consider the other factors, as each doesn't fall clearly in the top right corner of the matrix. AI technology developments and its utilization is seen as uncertain, but not directly the most impactful. From an impact perspective 'green transition requirements' and 'shifting experience expectations following digitalization and hybridization' could be selected, even though they are not seen as very uncertain forces.

However, both the 'AI tech developments' and the 'shifting experience expectations' share some common ground, as they both revolve around technological innovations being potentially disruptive and impactful. One is more focused on the production/organization side of events and the other more on the experience/demand side Business Events. If their common driving elements would be extrapolated this could, at this stage, also be combined into the driving force: *Immersive tech development and utilization*. This then on the one hand represents technological developments in relation to e.g. virtual reality, augmented reality and digitalization and how these cause shifts in experience expectations from a visitor perspective. On the other hand, this 'new' force also represents how immersive tech developments, as well as developments in AI technology may impact, facilitate

and/or be disruptive from a Business Event production and organization perspective. This also builds upon discussions on these topics during the first think tank workshop.

The discussions and their underlying inputs in post-its from the first Think Tank were used to further describe the force and its extremes of the now identified key uncertainties: *Changing value systems and Immersive tech development and utilization.*

Immersive tech development and utilization
Digital productivity and immersive experiences are key determining factors for the future of live events. Technology developments related to Augmented Reality, Virtual Reality and Mixed Reality (i.e. XR – Extended Reality technologies), as well as fast-paced developments in Artificial Intelligence (AI) can be seen as disruptors that could have great impact on the industry. How can they be utilized to facilitate current operational processes and for content creation? And to what extent are they a threat, e.g. from a skills and human resource perspective? How will these affect and assist the creation of immersive experiences and social connectivity both in a physical and digital way? Different generations may have varying expectation and familiarity levels towards tech induced experiences. 'Digital twins' can be promising innovations to facilitate virtual meetings, conferences, and exhibitions. How and if technical applications replace, enhance, or reduce the live experience of the attendee requires a response from the industry. What will the degree of 'virtuality of environment and location' of Business Events look like and how will this balance with the degree of 'social presence'? (see: (Yung et al., 2022)).

Plausible extremes

- **Fully virtual***:* Immersive XR technologies and AI advancements have become crucially defining factors for (competitive) Business Event organization. These technologies have advanced greatly and are widely utilized to such an extent that they have largely replaced the need and benefits of meeting on central physical locations. From an attendee perspective there are high demands for rich and immersive experiences, activating all senses and being tailored to personal preferences and mood in real-time. Obviously, the events are organized remotely, in a fully virtual setting and in digital twin event locations in the European Business Event metaverse world. Physically travelling to events is out of the question, as increasing concerns for the environment, nature protection regulations, and social norms towards long distance travelling, increasingly pose limitations towards this. Besides, everything is happening in the metaverse anyway, so there is not much to visit physically.
  From an organization perspective, these technologies, and especially AI, have greatly improved efficiency and replaced resources, thereby also solving staff shortages that physical event organizers were facing at the beginning of the last decade. Content and network activities can also be much more easily tailored to individual attendee preferences.

- **Hybrid hub and spoke:** Digitalization, AI and immersive tech have advanced greatly in the past 10-15 years. With it however also concerns regarding safety, security and issues of privacy have grown throughout society, strongly limiting their widespread use. From a Business Event perspective, the use of these technologies therefore mostly is geared towards being supportive in delivering event content to a wider international audience. Especially since these days, in the context of Business Event organization, there are increasingly strict European regulations towards sustainability, environmental protection and international travel permissions for attendees. Broadcasting is used to overcome such boundaries of location. Most Business Events nowadays are organized in hybrid hub and spoke settings, with some

event content being broadcasted from a central hub to various more localized venues (the spokes). This also allows for a more locally catered, and therefore more qualitative experience for attendees. Experiences are facilitated through CAVE's (an acronym for Cave Automatic Virtual Environment), a virtual reality room-sized LCD environment for a user to experience VR. These CAVE's generate a feeling of social presence between hubs.

Shifting (generational) value systems

Networking is a key objective in the BE industry, social connection is essential and there always will be a need for sense of belonging and community formation. Perhaps more than ever in this 'post-pandemic world', there is a longing for personal touch, connectedness, and togetherness. Yet what constitutes a 'live' and 'socially connected' experience from different (generational) perspectives is shifting, due to a stronger familiarity and confidence with digital (supported) ways of live meetings and events. A growing (climate change) awareness and importance for nature and environmental protection further influences value considerations towards the necessity of large-scale live events on location. The latter are also being affected by growing concerns, critique and action related to (flight) travel and stances on (over)tourism. From a social perspective, perceptions towards genders, equality and inclusion increasingly affect the approaches in the marketing of events, as well as accessibility concerns. How and to what extent these shifting value systems will affect the ways communities are shaped, and how events should be organized and innovated following this, remains uncertain. Yet it is very impactful on the future of the BE industry.

Plausible extremes

- **Socially exclusive***:* Values of older generations have remained dominant. This means there is still a strongly individualistic society. Partly fuelled by global unrest and destabilization, over time there has been a social backlash against being overly concerned with feelings of social exclusion and inequality.
  Business Events remain important from a professional perspective, as ways to connect, learn network, and form communities. However, 'live' means different things for different groups in society with those holding on strongly to traditional, physical meetings and those more embracing digital technologies to support event organization. In that sense this also forms a divisive factor regarding (attendance) accessibility for different target groups within the Business Event industry.
  Although there are still concerns for human induced climate change effects and environmental protection, increased global competition for the European economies, heralded a return to more economically focused values. Similarly societal values have shifted more towards local and national perspectives, as opposed to global and international.

- **Socially inclusive***:* Over time values of the younger generations Y (born 1980-1995) and Z (born 1995-2000) have become more dominant within society. This has led to a more open, less individualistic attitude towards others and being more geared towards collaboration, participation and sharing. Over the years, increased global unrest and destabilization events have strengthened the importance that is given towards social values of caring for one another and truly making everyone feel welcome, included, and equal.

  From a business perspective there is high value placed towards social connections and building global communities, also to better overcome (social) differences and to collaborate

more effectively on a global level. Digital ways of meeting have been crucially important for this and 'virtual social connection' has become just as (if not far more) valuable, normal and effective as meeting physically. Hereby also replacing the traditional definition of 'Live' meetings.

Increased concerns over human-induced climate change and the importance for environmental protection have further strengthened environmental and social values as opposed to economic values. Social injustice is minimized and the gap between rich and poor is bridged towards acceptable levels.

After having seen the key uncertainties identified, the next section looks at a framework to take them into account and construct a plausible storyline.

3.2.3 Scenario framework - scenario cross

When both core uncertainties are placed in an axes-cross with the plausible extremes at the end of the axes, a 2x2 matrix is created resulting in a framework with a different future scenario in each quadrant (see figure 16). For these scenarios an outline for a (perhaps) extreme, but plausible storyline is constructed, which connects to the combination of the two respective extremes on each of the axes. The function of these scenarios is that they appeal to the imagination and inspire people to new visions, concepts, strategies, revenue models, etc.

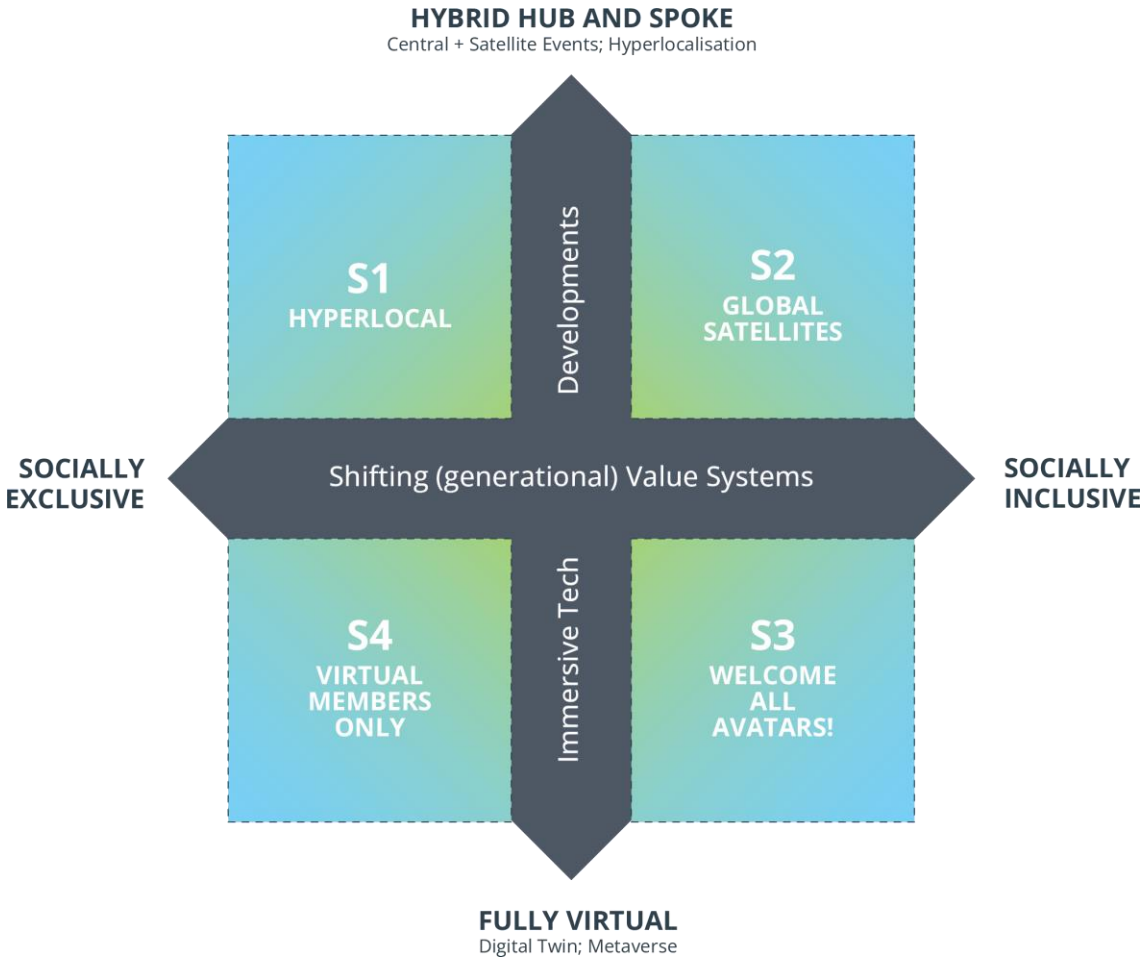

Figure 16: Scenario cross on the Future of Business Events

3.2.4 Scenarios - storylines

Based on the detailed description of the driving forces' extremes and the input of the participants during the workshop, the following four scenario narratives were constructed. These describe and imagine what the business events industry and its external environment in 2035 may look like.

Scenario 1: Hyper Local

Socially exclusive Values of older generations have remained dominant. This means there is still a strongly individualistic society. Over time, fueled by global unrest and destabilization, European societies have become more and more internally focused on national and local circumstances, as opposed to an external focus, holding on to international and global perspectives.

Business Events remain important as ways to professionally connect, network, and form communities. "Live" is still seen as the best way to form communities, and that means meeting physically. Forming local communities is the prime focus. Some degree of hybridization is relied on for business events, to still connect with international experts and networks. Yet the focus is on the local, physical environment and local perspectives. As such, the business event industry strongly holds on to traditional, physical meetings. After all, why change what's worked well enough for the last decades? The more localized the event, the better.

The green transition movement was more and more enforced since the mid-2020s, with also increasingly difficult competitive conditions for European economies as a result. Since around 2030 this has heralded a return to more economically focused values, and simultaneously strengthened the more inward-looking, societal perspectives and values.

Hybrid hub and spoke Digitalization, AI and immersive tech have advanced greatly in the past 10-15 years. With it, however, also the concerns regarding safety, security and privacy have grown throughout society. From a Business Event perspective, the use of these technologies is geared towards being supportive in connecting to international audiences on an 'if needed bases. Especially since, in the context of Business Event organization, the green transition movement has resulted in increasingly strict regulations towards sustainability, environmental protection and international travel restrictions for business purposes. Broadcasting is used to overcome such boundaries of location. Hybrid "hub and spoke" event settings, broadcast content of a central, main event (the 'hub') to more localized venues (the 'spokes'). This allows for more locally catered, and therefore more qualitative experiences for the select number of attendees. Immersive tech is used to enhance and enrich the attendee's experiences, however mostly in the localized venue settings.

Essence of the combination of the two extremes:

- Hyperlocalized focus for events.
- Tech, digitalization, and AI are supportive, but not a goal in itself.
- Immersive tech is used to enhance and enrich the attendee's experiences, however mostly in the localized and physical venue settings.
- More value given towards connecting with select and exclusive groups, more local community oriented. Quality over quantity.
- Overall, a more individualistic society. Values towards personal gain take precedence over care for 'the other'.

Scenario 2: Global Satellites

Socially exclusive Over time values of the younger generations Y (born 1980-1995) and Z (born 1995-2000) have become dominant within society. This has led to a more open, less individualistic attitude towards others and being more geared towards collaboration, participation and sharing within broad communities. Increased global unrest and destabilization events have strengthened the importance that is given towards social values of caring for one another and truly making everyone feel welcome, included, and equal.

From a business perspective, there is high value placed towards social connections and building international communities, also to better overcome (social) differences and to collaborate more effectively on a global level. Digital ways of meeting have been crucially important for this, and 'virtual social connection' has become just as (if not far more) valuable, normal and effective as meeting physically. Hereby also replacing the traditional definition of ''Live'' meetings. Hybrid event settings have proven to be as valuable and effective, as the increasingly outdated central, 'physical-only' conferences and congresses that were traditionally organised 15-20 years ago.

Increased concerns over human-induced climate change and the overall green transition movement that was more and more enforced in the last decade, have further strengthened environmental and social values as opposed to economic values. From an accountability perspective this has also strongly popularized the hybrid hub and spoke events, i.e. partially, centrally organised events, which broadcast content to global satellite events. This reduces attendee travel needs, whilst maintaining the ability to connect global networks to local communities.

Hybrid hub and spoke The advancements in Digitalization, AI and immersive tech in the past 10-15 years have made it easier than ever before to connect local communities in a global digital setting. Concerns regarding safety, security and issues of privacy have also increased though. This means local and more analogue connections and meetings are also still favoured by attendees. The use of these technologies for the organization of business events is therefore mostly geared towards being supportive in delivering event content to a wider international audience. Business events thus are mostly organized centrally, whilst maintaining localized physical accessibility and participation through the satellite events, so there is less individual privacy and security concerns. This also allows for a more locally catered, and therefore more qualitative experience for attendees. Immersive tech is used to enhance and enrich the attendee's experiences, mostly to globally connect the localized venue settings and communities to one another in an immersive way.

Essence of the combination of the two extremes:

- Localized focus for events, however hybrid elements ensure accessibility and participation for international audiences and to build, maintain and connect with international communities.
- Immersive tech, digitalization and AI are not a goal by itself, but are crucial for delivering immersive hybrid experiences, and ensuring the deliverance of the hub and spoke event settings.
- The goal of Business Events is to connect local networks to global networks and communities. And to be as inclusive as possible in terms of accessibility and participation. Technological advancements have made this more effective and easier than ever before.
- Overall, a more open and socially focused society. Taking into account the perspective of others, collaboration and synergy, equality and inclusion strongly affect societal norms and values.

Scenario 3: Welcome all Avatars!

Socially exclusive Over time values of the younger generations Y (born 1980-1995) and Z (born 1995-2000) have become more dominant within society. This has led to a more open, less individualistic attitude towards others and being more geared towards collaboration, participation and sharing within broad communities. Increased global unrest and destabilization events have strengthened the importance that is given towards social values of caring for one another and truly making everyone feel welcome, included, and equal. Gradually the metaverse has become accessible for everyone, similarly to the rise of personal handheld smartphone access, devices which by now are becoming more and more outdated. With virtual technology widely available, social segregation mechanisms largely disappear within the metaverse. Gaps between generations and different cultural and welfare groups are bridged by the opportunity for all to immerse into alternative realities. Because what does it matter where you are from if your avatar can be fully customised anyway?

From a business perspective there is high value placed towards social connections and building global communities, also to better overcome (social) differences and to collaborate more effectively on a global level. 'Virtual social connection' has become just as (if not more) valuable, normal, and effective as meeting physically. Hereby also replacing the traditional definition of 'Live' meetings. Since virtual technology is widely available, Business Events are more accessible than ever before for everyone.

Increased concerns over human-induced climate change and the overall green transition movement, have further strengthened environmental and social values as opposed to economic values. The latter resulting mostly in reduced (physical) travel and mobility for the purpose of business events.

Fully virtual Immersive XR technologies and AI advancements have become crucially defining factors for (competitive) Business Event organization. These technologies have advanced greatly and are widely utilized to such an extent that they have largely replaced the need and benefits of meeting on central physical locations. From an attendee perspective there are high demands for rich and immersive experiences, activating all senses and being tailored to personal preferences and mood in real-time. This is facilitated through remotely organized business events in a fully and highly immersive, virtual setting utilizing digital twin event locations in the European Business Event metaverse world. Physically travelling to events is out of the question, as increasing concerns for the environment, nature protection regulations and social norms towards long distance travelling, increasingly pose for limitations towards this. Besides, everything is happening in the metaverse anyway, so there is not much to visit physically.

AI-technologies have greatly improved efficiency and replaced human resources in business event organization, hereby also solving staff shortages that physical event organizers were facing at the beginning of the last decade. Content and network activities can also be much more easily tailored to individual attendee preferences.

Essence of the combination of the two extremes:

- 'Live' is Virtual and takes place in a highly immersive metaverse environment.
- Fully virtual, digital twin event locations ensure accessibility and participation for global audiences and for building, maintaining, and connecting international communities. All without attendees having to travel from their home, or office locations. The environment is thankful!
- Immersive tech, digitalization and AI are crucial for the delivery of high quality, fully virtual events, and immersive experiences. The advanced technologies and their widespread utilization ensure

that the divide between the locality of the attendees and the virtual environment is as small as possible.

- Overall, a more open and socially focused society. Being considerate towards the perspective of others, collaboration, equality, and inclusion strongly affect societal norms and values. Resources are widely available.

Scenario 4: Virtual Members Only

Socially exclusive Values of older generations have remained dominant. Society is strongly individualistic, and profit driven. Global unrest and destabilizing events have resulted in more inward-looking societies, less concerned with globalization and internationalization efforts. Over time there has also been reduced social concern for inclusivity and equality. The virtual metaverse has opened-up many ways to sell access to digital content. From highly customizable avatars, to NFT's to digital currencies. This has further strengthened social segregation mechanisms that have transferred over to the metaverse.

Business Events remain important professionally and economically, as ways to connect, network, and form communities. However, for (cost) efficiency purposes traditional physical events nowadays are largely outdated. The fully virtual metaverse worlds allow for far more valuable and effective ways to connect specific exclusive communities. Quality over quantity within this context! In that sense this also forms a divisive factor regarding (attendance) accessibility for different target groups within the Business Event industry. From a profitability perspective, selling access to these exclusive virtual, "members only" communities form an important element in business models for event organizers.

The green transition movement was more and more enforced since the mid-2020s, with also increasingly difficult competitive conditions for European economies as a result. This further reinforces the return to more economically focused values, especially due to (economic) opportunities arising from the virtual metaverse.

Fully virtual Immersive XR technologies and AI advancements have become crucially defining factors for (competitive) Business Event organization. These technologies have advanced greatly and are widely utilized by those that can afford it and fully benefit from the opportunities this presents. This has heavily reinforced exclusive access: the less digitally adept and less tech savvy are limited in their participation. Due to the high costs for access, attendees demand rich and highly immersive experiences, activating all senses and being tailored to personal preferences and mood in real-time. Gear needed in support of these immersive experiences are expensive and tech agencies offer high-end all-inclusive packages. The remotely organized and fully virtual events rely highly on big tech companies for their organization and (paywall) access to digital twin event locations in the European Business Event metaverse world. Content and network activities can also be much more easily tailored to individual attendee preferences. Data to personalize these preferences has become a valuable commodity.

The green transition of the past 10-15 years strongly affected social norms towards long distance travelling, hereby increasingly reducing the amount of travel and mobility in the context of business events. This further strengthened the lucrativeness of business models focuses on virtual business events.

From an organization perspective these technologies and especially AI have greatly improved efficiency hereby partly replaced the need for human resources. As well shifting required skills and competencies for event professional towards being more tech oriented.

Essence of the combination of the two extremes:

- 'Live' is Virtual and takes place in a highly immersive metaverse environment.
- Fully virtual, digital twin event locations focus on exclusive access for select groups.
- The fully digital and virtual event environments limit accessibility and participation for those that are less digitally adept or financially equipped.
- Immersive tech, digitalization and AI are crucial for the delivery of high quality, fully virtual events, and immersive experiences.
- Business models focused on exclusive, virtual business events are very lucrative.
- Overall, a more individualistic society. Values towards personal gain take precedence over care for 'the other'. More value given towards connecting with select and exclusive groups. Quality over quantity has become the motto.

3.2.5 Think Tank 2 outcomes

During the second Think Tank workshop, these storylines were further enriched with ideas, and positive and negative implications of these scenarios were discussed. The outcomes of the brainstorming and discussion sessions from the workshop are visually presented in appendix 6.4.

Because the scenarios are not predictions, but representations, or explorations of what could happen if certain driving forces move into certain (extreme) directions, the purpose of this scenario planning process is not to choose one as a target scenario. Nor to discuss the implications in detail on a per-scenario-basis. As the future would most likely hold a combination of characteristics and implications of each discussed scenario. Due to the extreme, but plausible nature of each scenario, together they can be perceived as the 'boundaries' of what the future of Business Events could look like, considering the driving forces these scenarios were built upon.

Based on these outcomes, visions and/or strategies can be formulated that take these extremes and e.g. the identified potential implications into account. In this sense, it anticipates such developments and implications in a more specific and focused way. Following this the below discussion and table thus represent a structured overview of all the collected input, grouped by scenario or subject.

For round 1, this is a summarized overview of the main sentiments and remarks, as they were represented through the post-its and the notes taken by the minute makers. The purpose of this being to indicate which components of the scenario narratives and choices stand out. This gives an indication of those aspects of each scenario that participants find e.g. hard to imagine and/or difficult to accept. For the second-round implications, the number of votes is in brackets (all remarks with 0 or 1 vote are omitted).

Round 1, Scenario interpretation and feedback

SCENARIO 1: HYPER LOCAL

The following aspects highlight the components that stood out the most in the interpretation of the scenarios during the subgroup discussions:

Positive

- More added value and impact (beyond economical) on a local level
- Lower time investments (less travel involved e.g.) is positive from a future generations' attendee perspective.
- Fewer events, and a more localized focus is beneficial for better niche targeting.
- The hyperlocal approach is a continuity on what we have, but it considers sustainability leading to more accessibility per train and less necessity for flying.
- Big companies will need to report carbon footprint as from 2024. End of 2025 big and small. There will be legislations about the number of CO2 a company can generate. If we are forced to reduce travel, we will be obliged to go to more hyperlocal or to more digital.
- Limiting certain business activities may curb economic growth, but it can also foster a deeper exploration and appreciation of local industries.
- By focusing on local venues, there is an opportunity to discover and learn more about community gems. Although less travel might reduce diversity exposure, it encourages more profound local connections.
- Selective Participation for Quality: Choosing which events to attend allows for a more quality-driven, purposeful engagement.
- Restricting events to key stakeholders can result in a more targeted and efficient discussion. This approach acknowledges that not all attendees contribute meaningfully to every event.
- The pandemic emphasized the need for time optimization and highlighted the oversaturation of online engagements. A balanced approach is now sought to determine the appropriate mix of online and offline activities.

Negative

- The BE industry as presented in this scenario is perceived as traditional and conservative in its approach. The involvement of local people is good but the resistance to change is bad. Too much business as usual while change is needed.
- The value of technology advancements in relation to higher quality and more immersive experiences is underutilized in a strongly 'physical meeting' focused BE industry.
- Adaptation to climate change (travel restrictions) is reacting to negative impacts instead of changing social behaviour at the core. Individualistic values are still very dominant here.
- Sustainability as regulations: sustainability is thought to be only achieved as a coercion and not as valuable for events.
- The inward looking, exclusive point of view is isolating from a network perspective, leading to closed communities. We need to solve problems as a community and not on an individualistic level.
- Hyperlocal focus may lead to hyperpolarization-where is the perspective of the other?
- This scenario does not change the status quo of inequality. There is no real transformation.

- Countries and cities will need to change their infrastructure because fewer people will be traveling.
- Benefits of hyperlocal, less impact on the planet, but you reduce the contacts and knowledge.
- Limited networking with broader groups could lead to more elite and focused interactions.

SCENARIO 2: GLOBAL SATELLITES

Positive

- There is an overall agreement that this is a realistic scenario as it is already happening in certain scientific communities.
- This gives possibilities for e.g. the public sector where costs should be limited.
- This scenario gives ample room for the democratisation of knowledge.
- A mix of virtual/digital and (local) physical means there is less need for complicated fully virtual digital twins.
- From a business model perspective, it is a positive that this allows for stronger local hubs and therefor stronger local impacts and legacies as well.
- Hubs would be better than individual digital connection, as it is not using as much energy.
- A blended model, which combines digital and in-person interactions, may be the most desirable option. While some individuals will always prefer face-to-face meetings, others might find online platforms adequate for their needs.

Negative

- This model may only really be worthwhile and work for certain communities/industries.
- Risks of technical illiteracy which needs to be overcome in this scenario.
- Digital is not automatically inclusive, risk of excluding certain target groups in such an approach.
- Privacy and data issues
- In such an approach it is harder to build social trust and social capital.
- Risks of oversupply of events and meetings. Difficult from an organiser's perspective. How to stand out and time to market?

SCENARIO 3: WELCOME ALL AVATARS

Positive

- The transition towards a circular economy is critical. We need to evaluate if the resources required for our current path are sustainable.
- E.g. events focused on knowledge sharing could transition to online formats. Events (components) where there is one speaker, and many listeners are well-suited to virtual platforms.
- There is uncertainty regarding the sustainability of our current practices, which warrants a thorough investigation and possibly a rethinking of our approach.
- Our decisions today will affect children aged 8-12 years in the future. We must contemplate the legacy we leave for them.

- History has shown that technological advancements can be surprising, as seen with the development of smartphones. It's important to remain open to the unexpected ways in which technology might evolve.
- The engagement is exponential, but we risk losing the story, leading to less quality. We measure engagement very well, the quantity of engagement. If the idea of an event is to learn, being in the physical world is better OR NOT?! Because the new generations learn in other ways. Our human behaviour is changing.
- All of us have a responsibility. Older generations have always had influence. Change should be happening, but more like some things are here to stay and other things might change.

Negative

- Strong focus on equality through avatars is commendable but could potentially diminish cultural richness and diversity. An excess of uniformity might dilute the unique contributions of different cultures.
- Complete digitalization presents a risk of exacerbating social issues. It's essential to find a balance that leverages technology while preserving social cohesion.
- Some communities are actively resisting digitalization. This resistance could be rooted in the fear of losing cultural identity or the belief that such changes could lead to negative consequences.
- The demand for multitasking might be leading to a loss of focus and depth in our work and interactions.
- While we cannot ignore technological advancements, we must be mindful of their potential to disrupt our way of life dramatically.
- Inclusivity and Equality in the Technological Era: The aim is to create an equal and inclusive society, but we must critically evaluate if methods utilized are truly achieving this goal.
- It is uncertain whether the approach as described in this scenario ultimately will lead to more inclusivity. If you are not good enough with socializing, you might feel isolated as well in the metaverse.
- Risks for digital breaches/privacy, data issues and copying of identity by alteration of avatars.
- Less accountability / transparency about the person who is behind the avatar.
- Risks of alienating part of society: we are not including those who are illiterate or that do not have access to technology.
- Too controlled: this is too much controlled. You don’t decide much, “they” decide for you.
- Where is the human touch that defines an event?
- From an environmental sustainability perspective, it is better, from a social sustainability perspective it is worse. Real value comes from a physical presence.
- These technological landscapes are also consuming a lot of energy.
- This type of environment or future is too dystopic, it frightens people.

SCENARIO 4: VIRTUAL MEMBERS ONLY

Positive

- With this, productivity might increase drastically.
- Such a model is great to monetize.
- Digital assets already a thing in gaming and metaverse, also good for monetisation.

Negative

- Feels too strongly based on technology considering the year 2035.
- Online and only digital connection is not working as seen during covid – impacts mental health.
- Strongly individualistic and strong focus on profit creation through technological profit models.
- You cannot create a legacy effect with a 100% digital event.
- Lack of authenticity.
- Risk of specific data/technology-driven companies taking ownership of a generic market.
- Digital events cannot replicate immersive experiences that captivate and trigger all senses.
- Stronger focus on objectives but less flexibility.
- Risk of Spillover into real world, becoming less democratic, more authoritarian
- Authenticity and culture disappearing.
- Such an inward-looking, closed model Doesn't support open innovation.
- Big environmental/social issues. People becoming disenfranchised.
- AI generated content checking AI generated content – human creativity disappearing.

Round 2, Implications

The following table gives an overview of the most-voted-upon, desirable and undesirable implications that were listed during the second round by the participants. In line with the previous elaboration on the function of the scenarios, these implications are grouped by category and derive from all scenarios. It gives insight into what the participants see as the most important potential implications to anticipate upon, considering these alternative future scenarios. In this way it helps to identify directions, strategies and actions for anticipating the (desired) future for business events in a more focused way.

Desirable	Undesirable
Experience/Interaction • New innovative, virtual experiences to increase engagement (8x) • Easy connection to wide and diverse, international audience/network (4x) • More focused and themed (hybrid) events to ensure more conscious attendance decision for attendees (3x) • Physical presence to avoid home office distractions à more engagement (2x) • Disconnect to connect, human touch (2x)	**Experience/Interaction** • 'Endogamic' industry: (hyper)local focus may lead to less culturally diverse and international experience/added value (19x) • Metaverse/highly digital experience = less humanity/emotional experience (14x) • Loss of quality of interpersonal communication/human interaction for highly digital events (9x) • Localized, exclusive focus means Impact of high digitalization on mental wellbeing (5x) • High digitalisation leads to low engagement (4x) • less interesting experience (2x) • Less personal experience due to global content (2x)
Accessibility • Digital event attendance increases inclusiveness from accessibility perspective (4x) • Physical attendees (4x) • Joining events remotely from anywhere (3x) • Better time management/investments in case of hybrid events (2x)	**Accessibility** • High travel times/time investments for attendance (4x) • Digital gap leaves a lot of people out if too strong of a focus on hybrid/digital event access. (2x)

Business model/economic value • Moving beyond traditional business model/more innovation benefitting from technology advancements (7x) • Easier connection to other ecosystems/networks outside event industry (4x) • Generating trust relations leading to more lead generation and business opportunities (3x) • More localized events = fewer logistics = more cost-effective organization = higher revenue (3x)	**Business model/economic value** • Highly digital/metaverse events means less economic value/revenue for destination (8x) • Hybridization of events involves high (resource) investments from organizer's perspective (7x) • (hyper)local focus is like Brexit, potential loss of business/trade linked to international exchange (3x) • Hybrid events = expensive business model (3x)
Organisation/Resources • Less negative impact on local infrastructure (3x) • Using digitalization/technology for more productive and efficient organization (2x) • Development of guidelines/regulations for fake/real content (2x)	**Organisation/Resources** • From a governmental/regulatory perspective strong hybridization of events may increase complexity regarding competition and public money expenditure (3x) • Difficulty to control visitor experience (2x)

Event impact • Strong local connection/bond, community values (10x) • Distribution of event hubs to smaller cities due to hybridization opportunities (8x) • Strong local community/destination involvement and empowerment (6x) • Quality over quantity, focus on the WHY of events (5x) • Technology integration to more easily collect data to improve impact (3x) • Strong local impact (3x) • More access to remote locations/communities due to hybridization opportunities (2x) • More visibility benefitting from digitalization of events (2x) • Reduced CO2 footprint due to less travelling (22x)	**Event impact** • Less revenue/benefit for stakeholders of the destination (8x) • Lower/No destination legacy impact in case of fully digital events (7x) • Non-inclusiveness and local focus = inward-looking, narrow-minded view (5x) • Fewer real-life legacy connections (5x) • Stronger digital/hybrid focus means degradation of local cultural life/quality of life (3x) • Less interaction with physical environment = less care for it (2x) •

Technology adaptation/integration • Technologies allowing for better data (tracking) of audience for profiling (12x) • Integration of AI and/or immersive technologies to enrich (personalized) experience (6x) • Adaptation to new technologies, more innovation (4x)	**Technology adaptation/integration** • Data ownership complexities/issues and regulations (who owns digital access data?) (5x) • Digital security challenges and complexities (3x) • Reliance on technological algorithms to decide on experience (2x) • Techno optimism instead of focus on actual issue: social (2x)

Figure 17: Overview desirable and undesirable implications of scenarios on future of business events

4. Implications, Conclusion and Next Steps

4.1 Scenarios Implications

4.1.1 Scenarios

The purpose of the showcased scenarios and the use of these in the Think Tanks was two-fold:

1. To explore the 'What If' question. The aim was neither to predict the future nor to propose these scenarios as a vision for the desired future of Business Events, but to spark conversation about how certain developments, - if they were to move towards extremes -, might impact the future of Business Events.
2. To gain a deeper understanding of the general sentiment towards potentially disruptive developments, taking into account perceptions of key experts from within and outside the business event industry. This creates insight into pressing issues and concerns towards potential implications. And it identifies what anticipation is required, to move from reactiveness to proactiveness.

In the scenarios the axes were constructed based on two key uncertainties:

- **Shifting (generational) value systems**
  - Leading to shifting (generational) values towards sustainability, long-distance travelling for the purpose of business (events), inclusivity, social impact versus economic impact, use of time/work-life balance and willingness to adopt and adapt to technological advancements. What constitutes a 'live' and 'socially connected' experience from different (generational) perspectives? How and to what extent these shifting value systems will affect the ways communities are shaped, and how business events should be organized (sustainably) and innovated following this, remains uncertain.
- **Immersive tech development and utilization**
  - Leading to shifting expectations towards digital productivity and the use of innovative immersive technologies in delivering user experiences. How and if technical applications replace, enhance, or reduce the live experience of the attendee requires a response from the industry. What will the degree of 'virtuality of environment and location' of Business Events look like and how will this balance with the degree of 'social presence'.

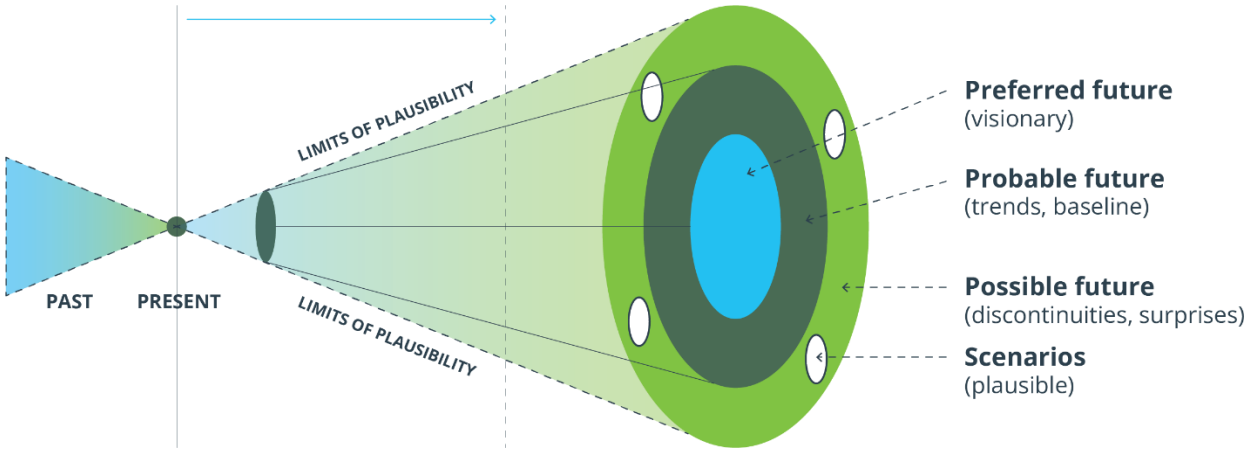

Figure 18: Futures Cone and limits of plausibility, (adapted from Postma, Hartman & Yeoman, forthcoming Dec 2024, & Voros, 2017.)

Following figure 18 on how one can look at the limits of the plausible in relation to key uncertainties, the four alternative scenarios (the white dots in the illustration) were constructed and are shown in figure 19 below.

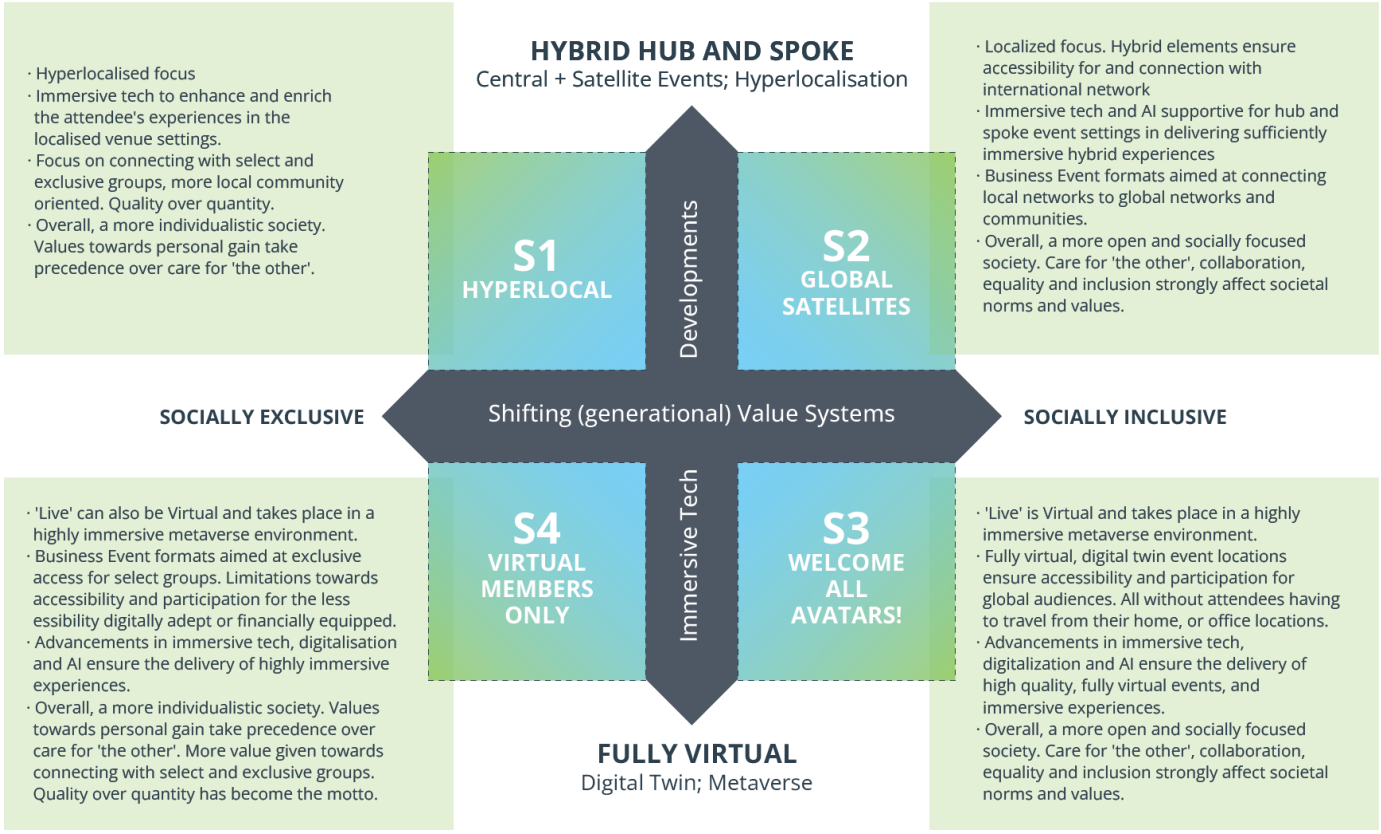

Figure 19: Scenarios Think Tank workshops BEFuture

4.1.2 Implications

When discussing and voting upon possible implications of these scenarios with key experts from the (Business Event) industry, the following top ten desirable and undesirable implications were identified. The implications are presented from most voted (top) to least voted (bottom) with the number of votes included.

Top desirable implications
Reduced CO2 footprint due to less travelling (22x)
Technologies allowing for better data (tracking) of audience for profiling (12x)
Strong local connection/bond, community values (10x)

Top undesirable implications
'Endogamic' industry: (hyper)local focus may lead to less culturally diverse and international experience/added value (19x)
Metaverse/highly digital experience = less humanity/emotional experience (14x)
Loss of quality of interpersonal communication/human interaction for highly digital events (9x)

New innovative, virtual experiences to increase engagement (8x)	Highly digital/metaverse events means less economic value/revenue for destination (8x)
Distribution of event hubs to smaller cities due to hybridization opportunities (8x)	Less revenue/benefit for stakeholders of the destination (8x)
Moving beyond traditional business model/more innovative business models benefitting from technology advancements (7x)	Hybridization of events involves high (resource) investments from organizer's perspective (7x)
Strong local community/destination involvement and empowerment (6x)	Lower/No destination legacy impact in case of fully digital events (7x)
Integration of AI and/or immersive technologies to enrich (personalized) experience (6x)	Impact of high digitalization on mental wellbeing (5x)
Quality over quantity, focus on the WHY of events (5x)	Non-inclusiveness and local focus = inward-looking, narrow-minded view (5x)
Easy connection to wide and diverse, international audience/network (4x)	Fewer real-life legacy connections (5x)
	Data ownership complexities/issues and regulations (who owns digital access data?) (5x)

Contradicting sentiments

Participants of the Think Tank workshops faced contradicting sentiments towards the alternative futures discussed. On the one hand, it is recognized that (generally speaking) the contemporary Business Event industry is quite traditional in its approach, and thus future developments, such as presented in the scenarios, may influence the effectiveness of current business models. Events that rely strongly on attendees travelling long-distance to central locations, may struggle when the willingness (in terms of time investments) and possibility for travelling to business events (e.g. due to travel limitations and regulations) will decrease.

Simultaneously, hybridization and increased integration of digital deliverance of Business Events (or components), let alone fully virtual events, is not a future that is very much welcomed and embraced. This especially, considering the perceived limitations it entails of not meeting physically and losing the human touch and emotions in the context of the meeting industry. Negative recollections of digital meetings during pandemic-times, also clearly influenced participant's perceptions.

Yet what constitutes 'live' for different generations? And how adaptable are younger, or future generations towards the integration of immersive technologies and digital attendance of events? Especially if such technologies may advance to a point where the boundaries between the physical (real) and virtual world are becoming more and more blurred and not as distinctly different? E.g. Millennials, GenZ and experts from the gaming and E-sport industry seemingly have a far more positive attitude towards the integration of immersive technologies

Desirable implications

- Participants welcome the potentially lowered carbon footprint due to decreased travel, if business events would (further) transform in hybrid hub-and-spoke, and perhaps fully virtual formats.

- From a user profiling and target marketing perspective, benefits are seen for the increased access to user data within such formats. Co-creating and sharing data is seen as highly potential.
- More effectively being able to personalize event experiences is also seen as beneficial.
- Local impact and value for local communities remains something to uphold or even strive for more, also if more hybrid business models are adopted. This thus provides challenges towards the future, as to how this can be reached when there are fewer attendees 'on location' which also benefit the (business) tourism destination in a wider sense.

Less voted upon, yet noteworthy desirable implications relate to

- The ability to join remotely, hereby increasing accessibility for a wider audience.
- Also, the connection with other ecosystems/networks outside of the business industry is expected to benefit from more hybrid formats.
- Within networking, connecting live while chasing leads and closing deals is considered key for the business model. To generate trust and co-creation, a live setting is crucial. Other touchpoints within a business deal and cooperation process are considered suitable for taking place in a digital format.
- Generally more technological innovation is welcomed if it does not fully replace the human, physical component.

Undesirable implications

- Participants mostly refer to the risk of the loss of cultural diversity and the added value of international connections and networking, if events would get a strongly localized focus.
- Also, the loss of the 'human touch' is once again underscored in the context of highly digitalized/hybrid event formats. This connects to the overall event experience itself, but also to the loss of quality of interpersonal communication hand interaction.
- Participants foresee undesirable implications concerning the reduced economic value at the destination level and for local stakeholders in strongly digital event formats.
- The high resource investments that expectedly are required for hybrid, hub and spoke, and/or fully virtual formats, is seen as a challenge and risk.
- Data ownership and privacy risks in highly digitalized events are concerning topics

Less voted upon yet noteworthy undesirable implications relate to:

- The increased complexity regarding competition and the expenditure of public money (through governmental support of the industry) if business events are increasingly organized in hybrid formats and local (economical) impacts decrease.
- Loss of talent, human capital, knowledge gap and need for upskilling and training.
- Also, inclusivity and equality in the technological era are topics for debate, once again highlighting the potential digital divide between different target groups in highly digitalized event settings.

4.2 Conclusion

The top undesirable implications seem to mostly relate to the strongly digital/technology focused scenarios, whereas the desirable implications connect more to the hybrid/hub and spoke scenario. Perhaps this scenario is seen as a combination of the best (and least negative) implications, considering the earlier discussed dilemmas. The benefit of technological innovation is acknowledged, as well as how digitalization can support becoming more sustainable, e.g. in having fewer attendees travel.

The importance of the green transition of the BE industry in which travel and mobility plays an important role also dominated the discussions in the external interviews with key experts. Technological advancements however can only play a supporting role in the necessary transition, and they come with their own challenges. There is a risk of techno-optimism whereas at its core many of the necessary transitions actually are social and behaviour oriented.

There's a clear recognition of the need for sustainable practices and the adoption of technology to enhance the event experience and industry operations. However, the engagement with new technologies like AI and digital twins is cautious, with a desire to balance innovation with preserving the human touch that is central to the community and sense of belonging.

The outcomes of the Think Tank workshops support and confirm the relevance of the departure points of the BEFuture project (see introduction). The four constructed scenarios in this context represent extreme, but possible futures for Business Events. They were utilized to discuss desirable and undesirable implications of such scenarios. How can the emerging opportunities that these developments entail be capitalized? And what is needed to anticipate this, as the future unfolds? Though not all-encompassing, the outcomes highlight the need for considerations concerning other key objectives and components of the BEFuture project, these are discussed in more detail in the next section.

4.3 Next steps in the BEFuture project

Through this report the outcomes of the think tanks form a baseline for next steps within the BEFuture project. It is used as a point of departure for a Whitepaper; a selection of Best Practices; a rollout of a Talent Development Program; the design of an Innovation Forum; the creation of Innovation Hubs; and in setting up guidelines in an Acceleration Program. Some implications for these components are further elaborated upon below.

Implications for the whitepaper

The whitepaper can be seen as a bridge between the identified scenarios, the capacity-building programs of the BEFuture project and the inspiration of the BEFuture stakeholders through (upcoming) best practice initiatives.

The main desirable and undesirable implications, but most importantly the dualism in sentiments presented in this report will form the basis for further discussion of future proof, sustainable Business Events. Also, further elaboration on what this entails for required skills and competences for event managers of the future will follow in the whitepaper.

Implications for the Talent Development Program

From the data, four main needs have emerged:

1. The growing possibilities to access knowledge leads to the need for young professionals to be able to self-direct their learning. Self-efficacy and learning strategies will become vital.
2. This easiness to access knowledge leads to the growing need for skills training. Skills cannot be acquired by or through AI and need human component training, with a specific focus on co-creation and networking.
3. The development and possibilities of AI are growing daily. However, up to this point, AI is not capable of human skills and such as creativity, entrepreneurship, empathy and complex problem solving. This leads to the increasing demand for these skills.
4. The increasing possibilities of AI result in the need for upskilling of senior professionals related to AI knowledge and application skills.

To design a constructive talent development program, the needs that have emerged from the scenarios are grouped and categorized. These categories showcase the full spectrum of skills, Knowledge, and Attitudes needed to be or become futureproof in the Business Events Industry. As the future is uncertain, the needs from all four scenarios are considered equally valuable.

The figure below presents specific skills, knowledge, and attitudes that were extracted from the data of the Think Tank sessions and interviews. They form the basis for further talent development, co-creation sessions, and other upskilling programs. In the Talent Development Program deliverable, these traits will be enriched and completed with additional field and desk research.

INTERPERSONAL SKILLS		SOCIETAL GLOBAL SKILLS	HYBRID SKILLS		ATTITUDES	KNOWLEDGE
CREATIVITY	Creative problem solving Self-confidence Imagineering	Sustainable Responsiveness Globality Analytical skills Change resilience Environmental stewardship Ethical behaviour	SYSTEM LITERACY	Blockchain technology AI application System analysis Algorithm design (big) Data processing	Caring Willingness Boldness Sustainable motivated Perseverance Respectful	Safety and security regulations Emission measurement and regulations Digital/ streaming & experience landscape processes Dossier knowledge Business models Experience design Meeting architecture
COLLABORATION	Co-creation skills Networking skills Empathy Trustworthiness		DIGITAL EXPERIENCE DESIGN	XR, VR & AR Engagement tactics Promptwriting		
INNOVATION	Critical thinking Active listening Acceptance of failure Persuasion		ANALYTICAL SKILLS	Deductive reasoning Criticality Ethics and fake discovery		
SELF- EFFICACY	Honesty Ownership Curiosity Kindness Self -regulation					

Figure 20: Extracted important skills, knowledge and attitudes from think tank sessions and interviews for (future) event managers

Implications for the Innovation Forum and Innovation Hubs

The shifting perception of ‘live’ and the friction of on-and offline experiences drives towards the ongoing need to host in-person sessions and face to face meetings. Trust, reciprocity, and kindness emerge as crucial characteristics in the ever-changing digital and physical landscape. It is only then that Innovation can truly sprout, which emphasizes the need for in person co-creation sessions, but

also the need for meeting and design architecture to ensure the new generation can benefit from experiences and mentorship to gain the necessary skills and become truly innovative.

Implications for the Best Practices and Acceleration Program

The selection criteria for the Best Practices were established through desk research. The findings in this report can contribute to these criteria to establish a valid baseline for the Acceleration Program application guidelines and selection criteria. However, the question remains what truly is innovative, also considering the potential expiration of innovations with the rapidly evolving (tech) developments. From the findings of this report, several recommendations were derived:

Category Sustainability

- Short term, there is an urgent need for knowledge of sustainability criteria and emission measurement throughout the supply chain (energy, food, water, waste).
- Shifting values towards mobility calls for a need for innovative solutions and alternatives. Long-term future regulations will influence travel behaviour significantly, with an increasing need for examples of smart initiatives that ensure positive benefits of event business travel on the destination.
- Best practices of carbon neutral and circular events are to be displayed to share expertise and inspiration through open sources to get the industry legislation-ready.
- Business Events can be made truly sustainable, however, their impact and influence on the destination are vast and difficult to grasp. The dubious status of incentives and the traditional approach of the (commercial and political) meeting industry is challenging in the pivot towards change. Which examples are there that showcase this pivot can be made?

Category Digitalisation

- How can hybrid and (online) experiences be(come) authentic and highly personalized, using smart data to create a lasting memory?
- Business models need to find their place in remote experiences. This calls for creative thinking and examples of an entrepreneurial mindset.
- Networking, a personal approach, and reciprocity are key in the business event sector. Examples of how these elements take shape in a digitalized world need to be identified.
- The use of AI will be supportive in shaping the creation of content. Conferences will need to remain valuable and worth attending.
- The understanding and application of Blockchain technology is at a starting point and best practices could provide valuable insight into how the Business Event industry can integrate and benefit from this technology.

Category Human Capital

- AI is going to facilitate event organisers and replace office managers. Which newly emerging jobs are attractive to retain and attract young talent?
- There is a growing dualism of inclusivity and diversity in the light of current (increased) polarization, populism, political right-wing shifts and global income inequality. Business events can take a leading role in showcasing best practice examples towards staying inclusive and diverse.
- The difference in intergenerational needs, specifically the different levels of generational adaptivity (upskilling for Baby Boomers and Generation X) and the skills gap of Millennials and

GenZ with low self-efficacy and search for identity. Best practices should inspire and appeal to all four generations.

- The (generation) gap in technological skills is significant. Best practices should be easily accessible and understandable.
- Showcases that integrated original, innovative, and green business models are vital to include in the best practices, considering the dualism of profitability versus prosperity.
- Partnerships remain of the utmost importance. Best practices on reciprocity and synergy throughout the supplier chain are essential.
- The ability to change and become or stay resilient is continuously affected by disruptions such as COVID-19, war, and climate-related- and humanitarian crises. Examples of human resource innovations are needed to inspire to contribute to building on welfare and well-being within our human capital.
- How inclusion and diversity are integrated into policy and practice needs best practices to give weight to the importance of this Sustainable Development Goal, considering the continuously increasing gap between rich and poor and concerning right-winged political situations that threaten freedom of being.

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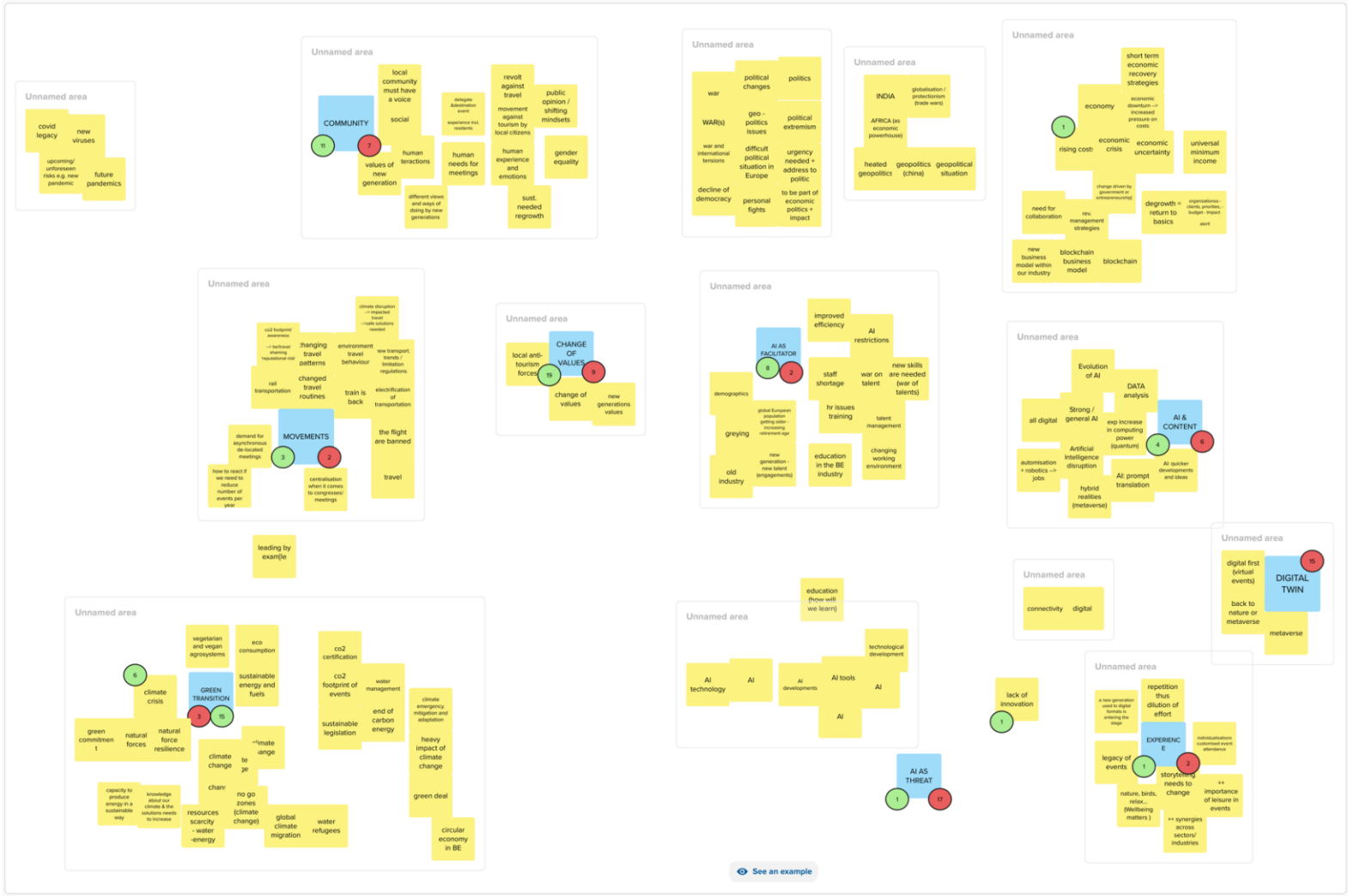
6. Appendices

Appendix 6.1: TT1- Outcomes observation mapping and clustering
Appendix 6.2: TT1 - Notes on process of clustering, taken during session based on group discussions
Appendix 6.3: TT2 - Scenario Storyline
Appendix 6.4: TT2 Output Round 1, scenarios
Appendix 6.5: TT2 Output Round 2, Implications
Appendix 6.6: GDPR considerations

6.1 TT1- Outcomes observation mapping and clustering:

Reorganized observation mapping and clustering



6.2 TT1 - Notes on process of clustering, taken during session based on group discussions:

Experience

- How much experience is possible and expected? E.g. for a medical conference this is different than for an event focusing on knowledge transfer or for other types of events/conferences in the event industry
- Content marketing is the key learning as an emotion
- There are also different types of experiences à digital versus emotional experience
- What choice do we (need to) give people in this?

Quality over quantity

- How big do the stages in the future still need to be?
- Most probably there will be fewer events, but those remaining will have a better quality
- Business events will take less time but will be more affordable
- The model which is focused on bringing together thousands of delegates is not feasible anymore in the future.

Community

- Community is still important, this holds true equally for private life as well as for professional life

AI

- Artificial intelligence will have great impact on how we organize events
- Ai will facilitate a lot of processes
- Ai can also be a threat as we do not yet know what negative impacts of this technology can be
- Ai can help in content generation, data analysis, translations to serve international audiences better,
- Automation and robotics will also influence the organizations of events

Digitalization and business models

- Expectations will be more important because
    - Mass travel is not possible anymore
    - Metaverse 3.0
    - Current business models will not work anymore in the future
    - Income will need to diversify more
    - Completely virtual meeting spaces will become more normal
    - We will still be there as an industry, but the industry at large as it exists now will need to change/adapt and will most probably be smaller.
    - Business venues will need to welcome more smaller events

- Business models as such are not a driver of change but they do need to change as a result of other drivers
- Digital twins of cities are already being developed in order to provide for an alternative way of ‘meeting’, connecting and collaborating (e.g. Goteborg and Flanders)
    - Whilst now the metaverse is still quite distant, combined with such digital twins this may become more relevant
- Digital twins also make a lot of sense for imagination and rehearsal
- Still, meeting online is very different than meeting physically
- We need to think about the next generation though, they are much more familiar with digital ways of connecting and meeting
    - We will start seeing events that will have maybe 500 people meeting physically and 5000 people online. Hybrid events will become more common, accepted and expected
- Ten years down the line these digital developments will be far more developed abd will have far more impact. This also counts for the metaverse

General

- Looking at the observations that are put down and the clusters that are emerging we see developments related to generational change, travel&movement changes, increased attention for sustainability and certification, virtual events and metaverse impacts.

6.3 TT2 - Scenario Storyline

Inspirational storyline/ video script workshop

Today the conference starts and you are excited to meet your fellow delegates and make new contacts. You pick up your coffee from the kitchen and collect the Senseskin jacket that was sent to you in the conference package. What a high-end piece of garment! You slide into it, it fits perfectly, the nano skin organically mimics your body, you don't even feel the gloves.

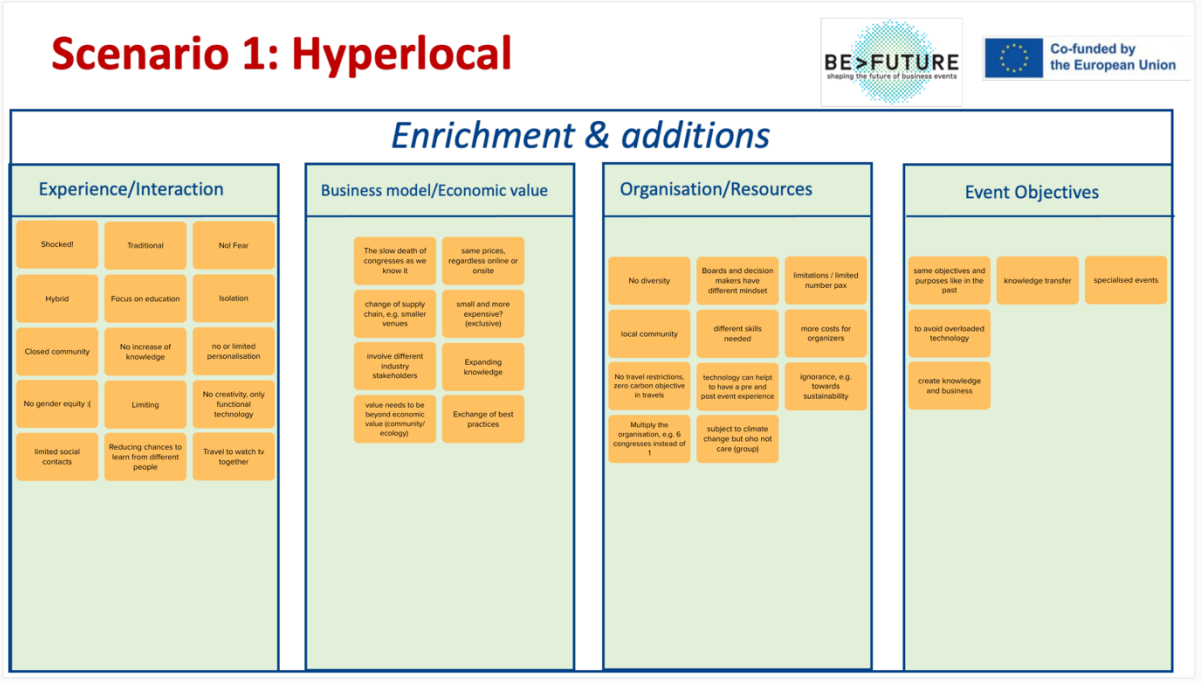
When you put on your goggles, immediately you are pulled into a vibrant cityscape, skyscrapers soaring to the heavens, illuminated by holographic advertisements. A gentle breeze tinged your cheek and the scent of your coffee mixes with that of freshly baked muffins and you navigate towards the renowned Global Conference Center. Arriving at the Center's entrance, your digital avatar is granted access by the state-of-the-art security scanners and the pling in your ear reminds you to top your membership-crypto's later today. Stepping through the grand doors, you enter a colossal lobby pulsating with energy. Participants from every corner of the world converge here, represented by their avatars, each bearing a unique symbol of their profession or industry. The main auditorium is massively dome-shaped, constructed entirely of transparent nano-glass, revealing a breathtaking panoramic view of the surrounding cityscape. The lights dim, and the dome transforms into a celestial sky, with twinkling stars and floating planets. You settle into your seat, marveled by the immersive technology that seamlessly blends the virtual and physical worlds. The event begins, and the holographic keynote speaker, an acclaimed event entrepreneur shares their awe-inspiring insights and holographic projections of their inspiring story.

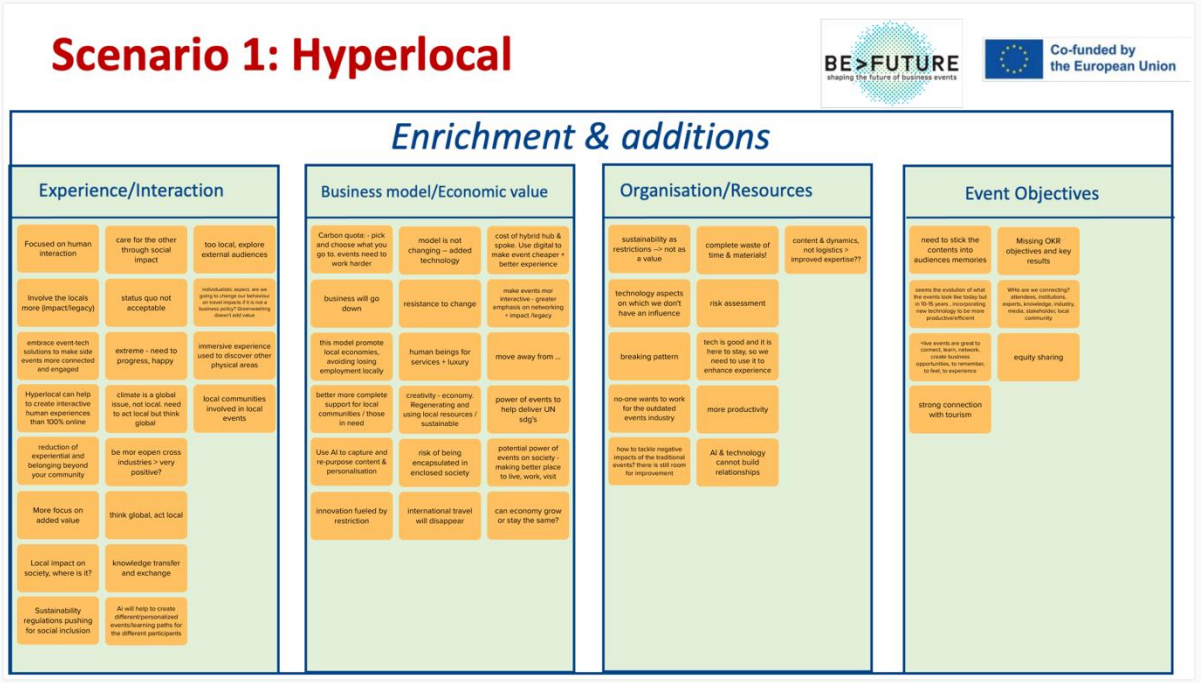
Onwards to the breakout sessions, spread across several virtual rooms designed in themed settings contributing to your well-being. You decide to attend two sessions simultaneously, to ensure your value for money. Next, you journey to a bustling marketplace full of futuristic stalls and vibrant displays, where virtual contacts and entrepreneurs proudly exhibit their emerging event technologies, and new 'venue' opportunities. You engage in conversations, striking up deals, and experiencing products through "touch simulations". Your artificially intelligent assistant Johnny carries your goody bag with newly purchased products and uploads meetings, contact and follow-up tasks in your avatar profile, saving you tremendous amounts of time.

As the sun sets upon the virtual cityscape, participants gather by the digital bonfire for holographic networking drinks. The taste of the Sunset Margarita lingers in your mouth while you talk to a fascinating CEO from a Chinese Event company designing venue skins. You are notified that a friend from Colombia just entered the Global Conference Centre and as you look right, he is already next to you, shaking your hand as he receives his favorite drink from the botbutler. More global experts join, and it's as if you've known them for years, even though you're separated by thousands of physical miles. The event concludes with a breathtaking show—an orchestra of virtual musicians, each avatar synchronizing notes flawlessly. The melodies resonate deep throughout the audience, evoking a sense of unity and togetherness. What a privilege to be part of this club of experts! With memories etched in your mind, you bid farewell to this captivating event. Stepping back into the real world, carrying the inspiration, connections, and boundless possibilities that tomorrow holds.

Welcome to the year 2035 —the birth of a new era where imagination knows no limits, where virtual business events break barriers and bring together minds from every corner of the globe. This is the future of business events, or do we foresee other plausible futures?

6.4 TT2 Output Round 1, scenarios

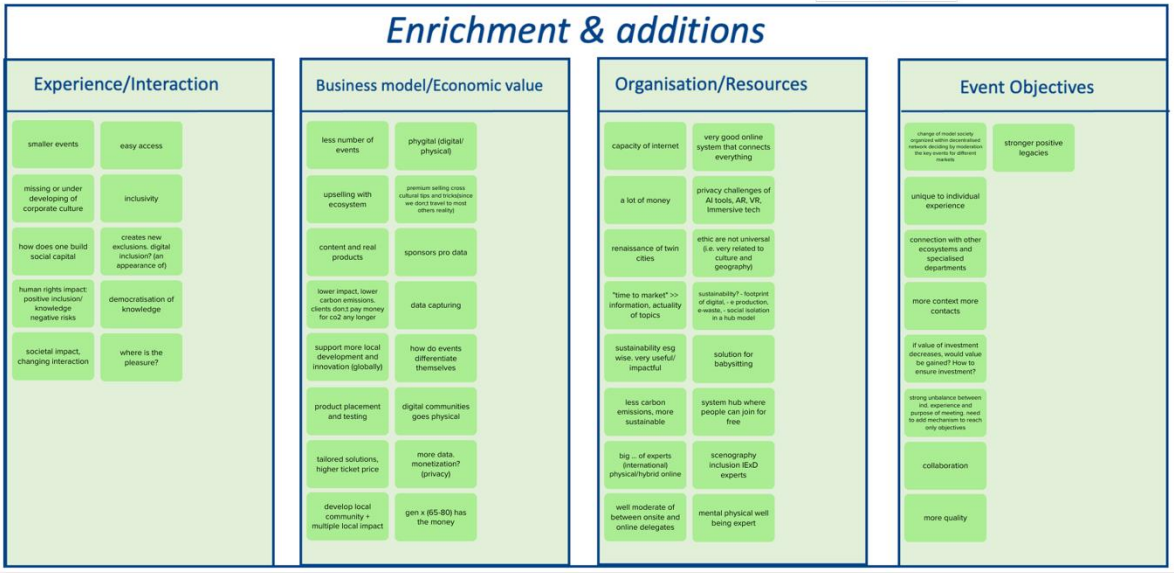




Scenario 2: Global Satellites

BE>FUTURE shaping the future of business events

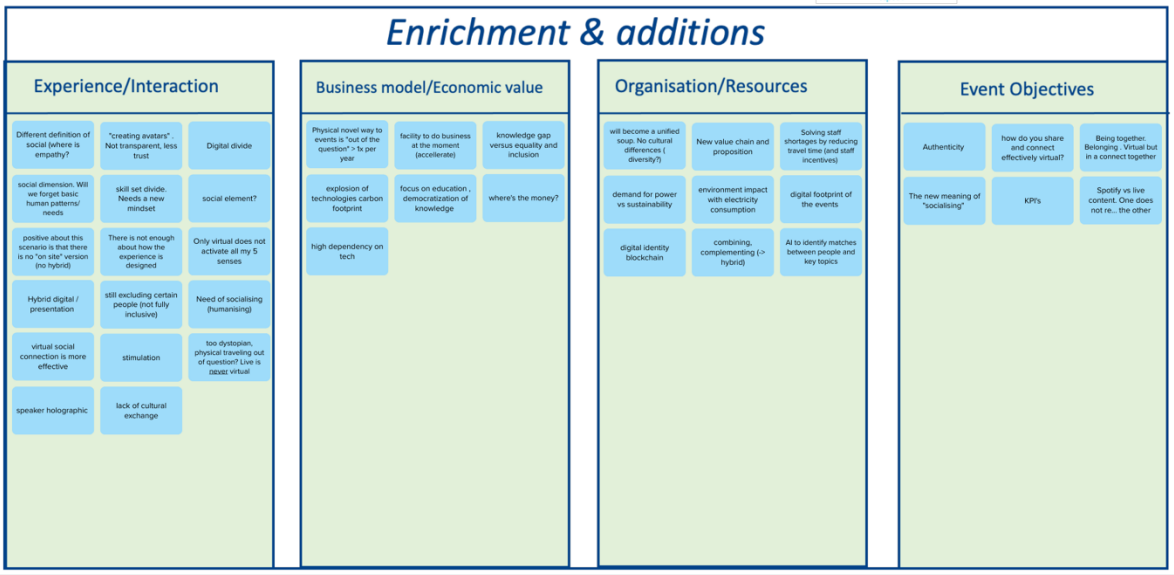
Co-funded by the European Union



Scenario 3: Welcome all avatars!

BE>FUTURE shaping the future of business events

Co-funded by the European Union



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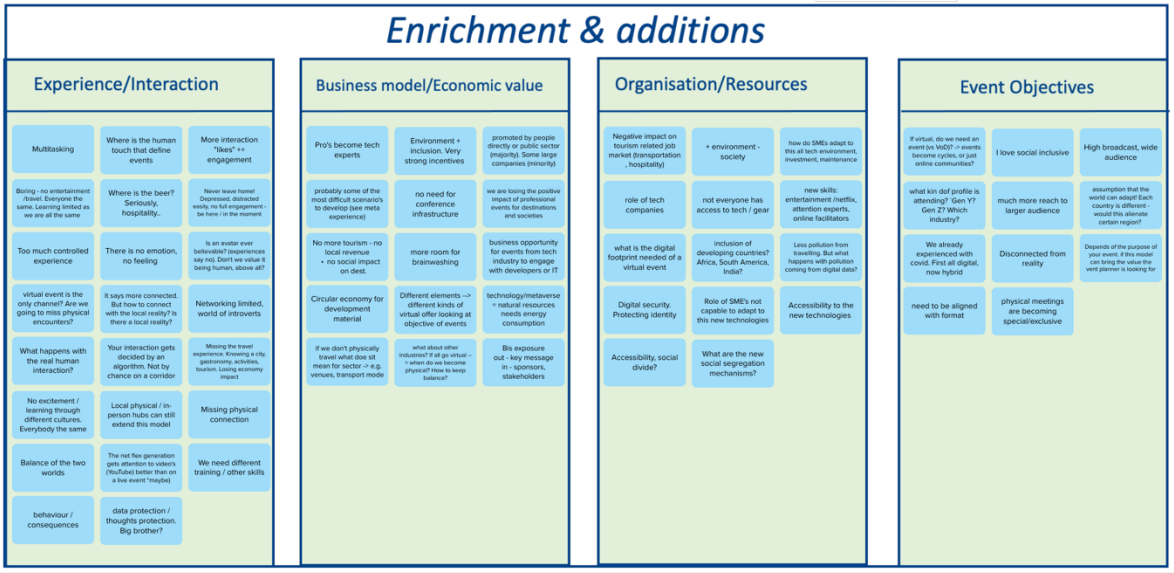
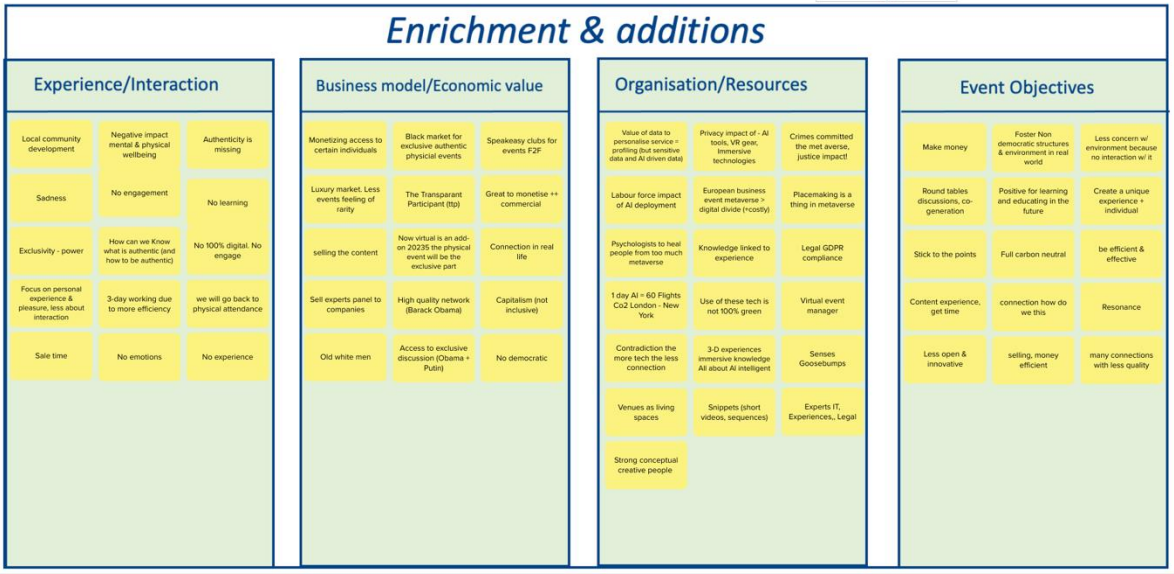
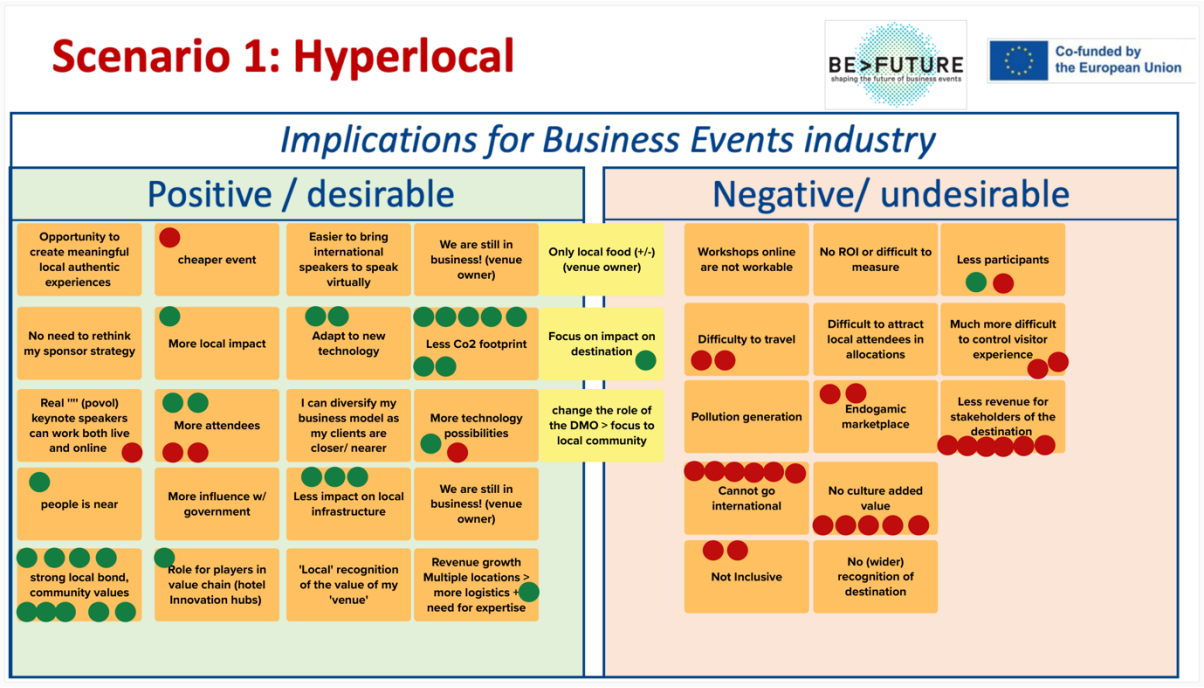
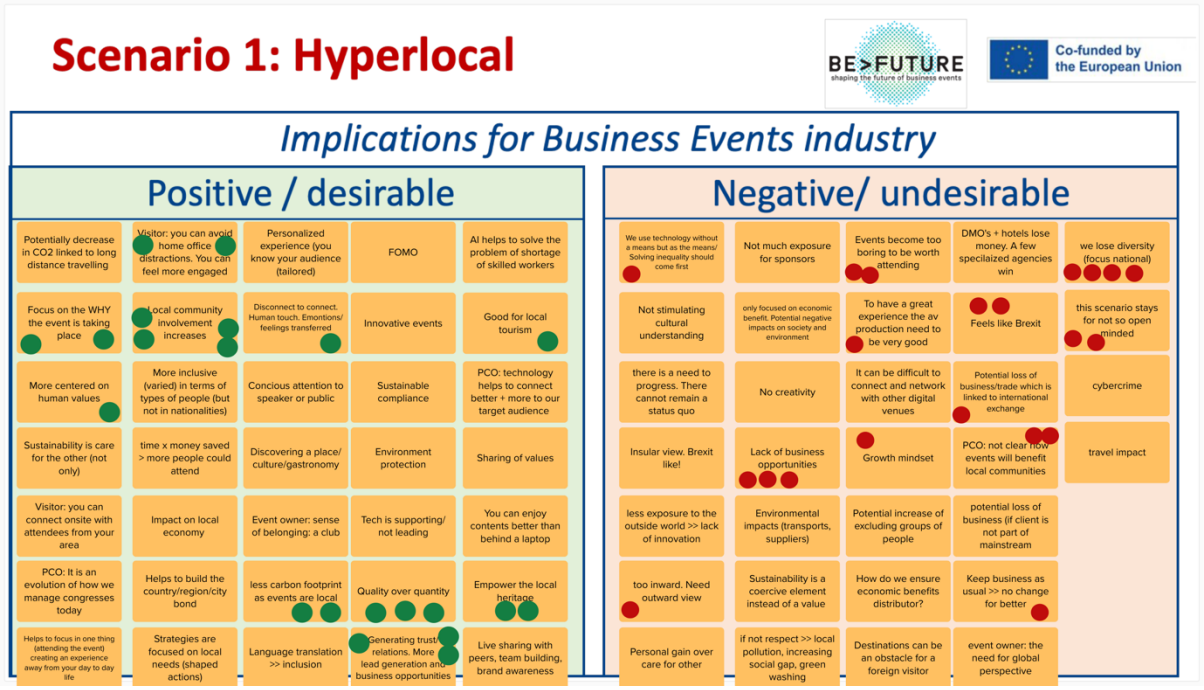


Scenario 4: Virtual members only



6.5 TT2 Output Round 2, implications





Scenario 2: Global Satellites

Where is the mobility variable?

BE>FUTURE shaping the future of business events

Co-funded by the European Union

Implications for Business Events industry

Positive / desirable

- PCO: more business opportunities to sell tickets to a global audience
- To connect with other ecosystems. Add value (outside the industry)
- More flexibility opportunity for visitors
- ROI stronger measurement +/-
- Sponsoring: data collection
- New opportunity to connect with different audiences. To change your new contacts and terms and conditions. Keynote:
- PCO: can get paid for going to a certain city
- Sponsor locally, global impact linked to content
- Expert role are a succes key
- External train connections
- PCO: Use your own event to sell expertise to potential clients
- Sponsor: global visualisation
- Save (more) time easy access
- Legacy local impact, less co2 impact
- Organizers: cooperation international
- Participants will choose more wisely
- Carbon impact
- Distribution of hubs to smaller cities

Negative/ undesirable

- Disrupts the business model (F2F) of events (for commercial events)
- Visitor: less personal, global content
- Gov: complexity, regulation, competition, (public money)
- Increase of cost for event owner. More difficult to achieve the event goals with hybrid
- Venue owner: investment and resources
- Positive keynote. Global impact
- Expensive model (hybrid)
- Less export income for government
- More invest in rail 2 sustainable travelling (government costs)
- less real life legacy connection
- less personal, global content (visitor)
- Risk hacking
- PCO: more resources involved

Scenario 3: Welcome all avatars!

BE>FUTURE shaping the future of business events

Co-funded by the European Union

Implications for Business Events industry

Good way to keep busy for life on mars planet

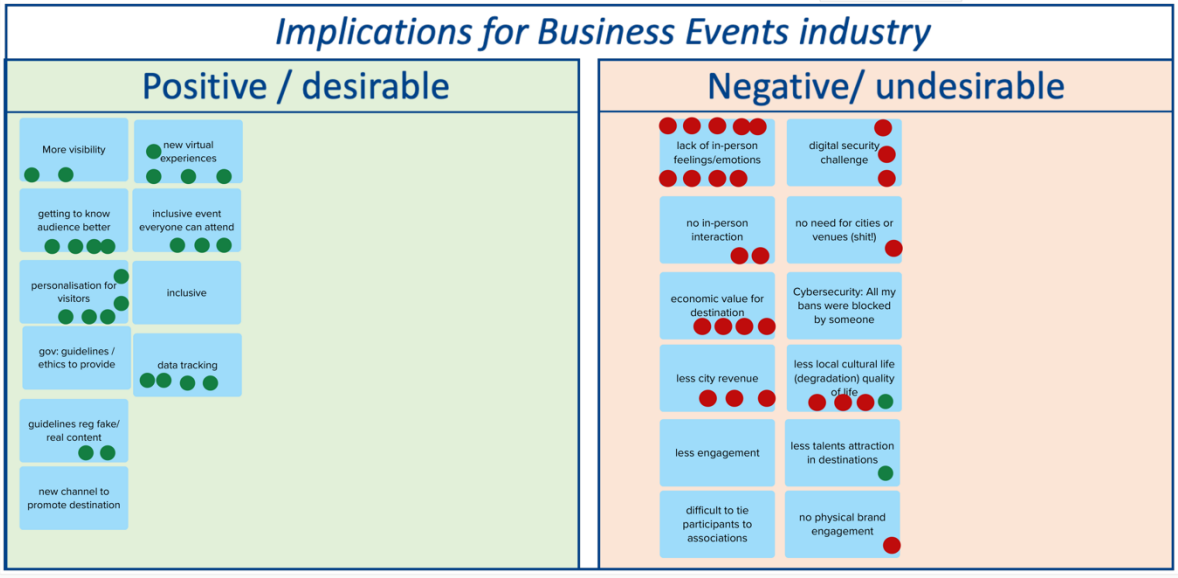
Positive / desirable

- Visitor: can join from anywhere with internet + laptop
- sustainable: less travel impact
- global and huge communities
- easy to collect data to improve impact
- chances to create powerful continuous communities
- Visitor: good experience for large events with people from all over the world
- access to remote locations or communities. (everyone can have a smartphone or internet)
- measurable (IT KPI's)
- good for shy people good for Netflix-gen
- Many options to meet my members/ stakeholders
- visitor: you can attend more events in less time
- personalized experience
- Gen Y & Gen Z or developers audience attention
- diverse + equal, inclusion
- PCO: more ways to communicate/interact with potential target audience
- it could be more productive
- new business model
- social welfare: easy to connect with people everywhere
- efficiency, fast, immediate
- enrich with AI the experience / knowledge of the event
- new business opportunity (also venue)
- more engagement or interaction
- mitigation of carbon footprint
- easier get the information and needs from our members
- no more boundaries
- wider audience
- easy to monitor strategies to manage tourism
- sponsor: you have data and cold segments and target this audience

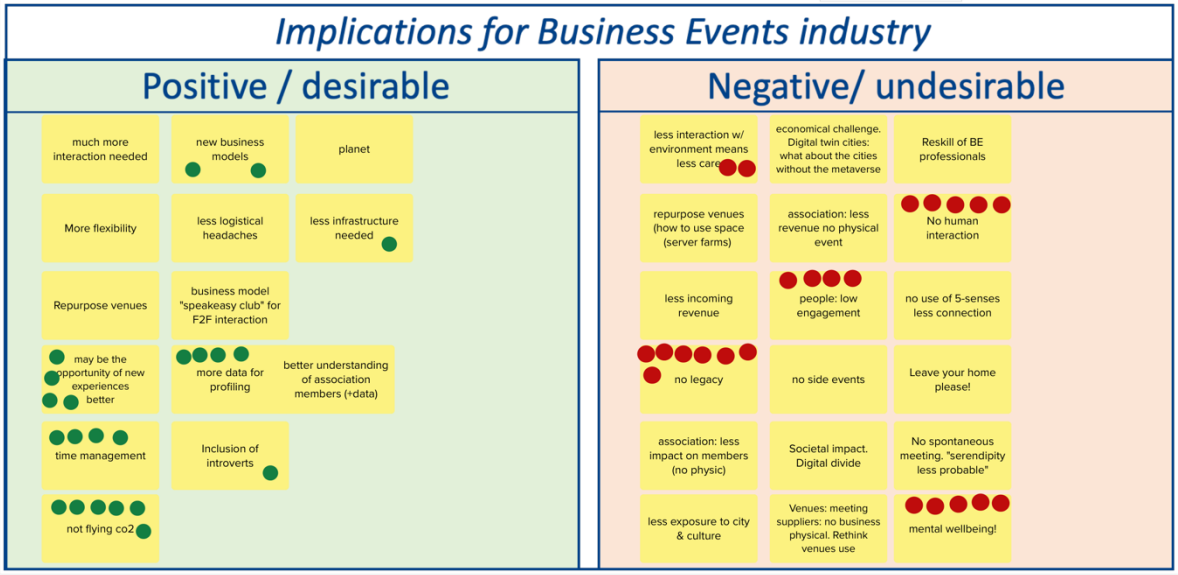
Negative/ undesirable

- You can not have a full human experience
- digital gap leaves a lot of people out
- what is the"plan B" of all the data (legal regulations), who owns the data
- new mental health diseases/addictions
- less attention to a live event or conference
- participants without tech skill may struggle
- our society loses the quality of communication
- digital breach
- your interaction is biased (algorithm)
- barrier to entry
- the interaction with other attendees may be "fake" or less realistic
- negative side effects on the environment
- digital footprint
- no human touch/ no feelings/emotions
- loss of humanity, where is the nature
- You can easily be distracted with the physical environment
- inequalities within communities
- fast consuming experience
- no live network
- less quality of engagement (maybe)
- technology decides what to do/connect or recommend
- less positive social and economic impact for territories
- overwhelmed by a mass online experience
- no travel experiences: exchange of culture, gastronomy, activities
- in our industry we become more dependent on technology owners
- loss of "libre arbitre" content is spoon fed
- who owns the data
- controlled recommendations
- no economic impact on a city/region
- we focus a lot on techno optimism and not on the real problem! social issues
- social sustainability is less
- need to modify/adapt to new ways of doing our job (pco)
- difficult to gather the infrastructure (pro)
- as an association the personal community is the root
- legislation/ hacking and cybersecurity

Scenario 3: Welcome all avatars!



Scenario 4: Virtual members only



6.6 GDPR Considerations

All the experts as well as participants of the think tank sessions signed a data protection.

Think tank sessions: every participant of a think tank session signed an attendance list that contained the following data protection clause:

The BEFuture European Project Partnership (AGENCIA CATALANA DE TURISME, B. LINK BARCELONA STRATEGIC PROJECTS SL, TIPIK COMMUNICATION AGENCY SA, TOERISME VLAANDEREN, LINKEUS, VERBAND DER VERANSTALTUNGSORGANISATOREN E.V., STICHTING NHL STENDEN HOGESCHOOL and UNIVERSITA' DEGLI STUDI DI MILANOBICOCCA) is responsible for the processing of the data and, as such, it processes the data you provide to collect information related to the BEFuture project goals. The data provided will be part of the project and be available to the general public and will be kept as long as the BEFuture outputs are useful for the Business Event's sector. You also consent to have videos with audio and photos taken during the event to be used on social media and or the BEFuture platform. The knowledge shared that is useful for BEFuture will be used to produce the project outputs. You have the right to obtain information on how your data is managed, and to revoke the consent granted or to exercise your rights of access, rectification, deletion and portability of the data, and of opposition and limitation to its treatment by communicating to lopd.act@gencat.cat or at the postal address Passeig de Gràcia, 105, 08008 - Barcelona. You are also informed that you have the right to submit a claim to the Data Protection Control Authority,being in the case of the Catalan Tourist Board, Data Protection Authority.

People interviewed: all people interviewed are either part of the stakeholder map, which comply with data protection as per https://forms.office.com/e/m1VFNUU8fW, or were interviewed separately and complied with the data protection clause. The name of the experts that did not comply with data protection were removed and the name of the organizations they work for was kept.