

# HYBRID EVENTS

Just How  
Profound  
a Pivot?

A STATUS CHECK FOR THE EVENTS INDUSTRY

DECEMBER 2021

# HYBRID:

## A thing of mixed character; combining two different elements

OXFORD LANGUAGES DICTIONARY



A Letter From the Presidents\_ 1

Acknowledgements\_ 2

1.Elevation\_ 4

2.Transition\_ 12

3.Onboarding\_ 19

4.UXP To Date\_ 28

5.Business Models\_ 36

6.Future Landscape\_ 46

### LETTER FROM THE PRESIDENTS

The event industry is one of innovation and creativity, in a continuous search to deliver unique experiences enabling the exchange of knowledge, stimulation collaboration and driving trade worldwide. The pandemic stimulated us to go even faster and bolder. By creating and implementing digital solutions in record time, we were able to continue to connect communities worldwide.

The learning curve in doing so is steep and there is still a lot to do before excellence is delivered in terms of service, business model, experience, etc. Both organizers and convention centers are still in the process of navigating through uncharted territories, learning both from each other and from other stakeholders and even other industries.

This is the key reason why AIPC and IAPCO decided to create a joint research paper on hybrid events, based on input from each other's member-communities and enriched with valuable insights from other stakeholders in the event value chain.

Close to 30 interviews with industry thought leaders, combined with in-depth research through 30 reports and 75 articles, resulted in the document in front of you. While the report does not have the ambition to provide the ultimate answers to all the questions related to hybrid events, it does provide unique insights on how the industry's approach to hybrid has evolved, the challenges addressed and the ones still to be tackled, and it offers a view on the possible avenues ahead of us.

# HYBRID EVENTS

## Just How Profound a Pivot?

While the ambition of delivering excellence is shared by all the contributors, you will find that there might be different ways in doing so. This variety in views and approaches is the result of the speed in which we adapted ourselves to a new reality, the different environments we operate in and the different cultures of our respective organizations – which result in an immense richness in terms of ideas and opportunities. Sharing these views will allow for better understanding, collaboration, innovation and ultimately in a joint growth path.

Doing so would not have been possible without the generosity of the contributors to this document in terms of time, information provided, and insights shared. Thank you all for doing so.

We hope you will find this paper will provide you with answers to some of your questions and that you will find the inspiration for taking organized events to the next level.

Greg O'Dell AIPC President | Ori Lahav IAPCO President



# ACKNOWLEDGEMENTS

AIPC and IAPCO are grateful to the organizations and persons who contributed to this study. Among key contributors were:

**Erwin Balkema** CEO, Bano

**Isabel Bardinet** CEO, European Society of Cardiology

**Ajay Bhojwani** Managing Director, MCI Middle East

**Marcel Boekhorst** CEO, Signum Interfocus

**Sherman Bonofacio** HSE Manager, Eurovision Song Contest – Ahoy 2020,  
Senior Consultant, TSC Crowd Management

**Sven Bossu** CEO, AIPC

**Baptiste Boulard** CEO, Swapcard

**Martin Boyle** CEO, IAPCO

**Oscar Cerezales** Chief Strategy Officer, MCI Group

**Craig Colley** Head of ICT, The Convention Centre Dublin

**Gerd De Bruycker** Marketing Director EMEAR, CISCO

**Michel de Jong** Head of Global Security, COFRA Holding

**Johan de Wit** Technical Officer Enterprise Security, Siemens Smart Infrastructure

**Stephanie Dubois** Head of Global Event Operations, SAP

**Marta Gomes** Deputy Executive Director Sales and Marketing Division, VIPARIS

**Tejal Hartalkar** Research Analyst, Grand View Research

**Julianne Jammers** Managing Director, SwissTech Convention Center

**Ori Lahav** Vice President Clients and Operations, Kenes Group, and President, IAPCO

**Juliana López** CEO, Cartagena de Indias Convention Center and President, Grupo Heroica

**Varsha Makhija** Team Lead Client Relations, Grand View Research

**Nico Meyer** Event Strategist, MeetingMatters

**Michiel Middendorf** General Manager, GL events World Forum The Hague

**Taubie Motlhabane** Managing Director, Cape Town International Convention Centre

**Brian Nash** Director of Audio Visual Services, International Convention Centre Sydney

**Gregory O'Dell** President and CEO, Events DC and President, AIPC

**Wee Min Ong** Vice President Conventions & Exhibitions, Marina Bay Sands

**Siddhesh Palsule** Principal Report Author, Grand View Research

**Frank Schoonhoven** Managing Director, Lumi

# HYBRID EVENTS

Just How Profound a Pivot?

Coordination of the collection, writing, editing, vetting and formatting of the information in this compact study was performed by Glenn Schoen of Boardroom@Crisis BV, based in The Hague, the Netherlands.

# 1. ELEVATION

Just how much of a ‘hybrid revolution’ has the events industry witnessed since the start of the Covid-19 crisis?

“I’ll tell you how fast things have gone with hybrid and the events industry under Covid-19: so fast we can’t even agree on just what hybrid events are.”

**MICHIEL MIDDENDORF** General Manager, GL events World Forum The Hague

Hybrid work, hybrid events, hybrid systems, hybrid warfare – part of a growing list of concepts somehow combining the on- and offline, the physical and the virtual. With Covid-19 accelerating global remote work technology and practice beyond any prior expectations, hybrid for many has become the phrase to capture the change of the era.

“The pandemic forced the remote capability issue for everyone,” observes events industry consultant and MeetingMatters Event Strategist Nico Meyer. “For employers and employees it meant Work From Home (WFH) to keep things running, and for the events industry it meant going virtual to keep events going, albeit initially mostly via streaming. There’s your first advantage to hybrid – reach. For the event that couldn’t be held live, for the people who couldn’t travel there and be there in person: still the event to experience. Since roughly Q3 2020, as part of that, we’ve seen hybrid starting to really gain traction: generating interaction between people live and online, and with that, increasing connectivity. Starting with the studio concept of live presenters reaching remote attendees and an interaction level not much beyond a chat function, hybrid has since significantly expanded and diversified in 2021. By now we’re looking at an ever maturing platform capability with an improving experience level, and the rapid evolution of parts of the events industry as a whole.”

Just how much of an evolution, its parameters, its prospects and its speed are all the question.

The exact velocity of hybrid’s 2020-2021 take-off remains in doubt for lack of clear numbers, especially as much data-gathering on recent hybrid event activities has yet to be collated. Survey data from Q1 and Q2 2021 combined with best guess estimates from industry heavyweights like MCI Group suggests that up to 50% of major conference and congress venues are actively engaged in providing, facilitating or rolling out some form of hybrid services as of Q4 2021, and perhaps another 20% are seriously studying their options, or weighing a rollout. Most but certainly not all are doing so in close concert with one or more tech partners, either owning or co-owning their own platform (not seldom an upgrade of a pre-existing studio capability), or facilitating the use of those owned by organizers or tech companies.

“Even with the exact numbers in all categories still out, that the first 18 months of Covid-19 saw exponential growth, well that part is a given,” observes Siddhesh Palsule. He is the principal author of the Grand View Research Q3 2021 report Virtual Events Market - Market Analysis 2016-2028, perhaps the most detailed study of its kind to date. “Hybrid is a sub section of the virtual events market,” notes Palsule,



**NICO MEYER** MeetingMatters

*“For the event that couldn’t be held live, for the people who couldn’t travel there and be there in person: still the event to experience.”*



“and companies doing virtual events in-house have to date far outstripped what the events industry has done, but undeniably, hybrid is booming in the events space, has caused a whole tech domain to mushroom, and its growth potential is vast.”

A leading global US-Indian market research and consulting company, Grand View Research believes, indeed, that the hybrid events market is geared for solid growth through at least 2028. That strong growth projection is echoed in numerous reports, articles and statements generated by and for the events industry in the past several months. An industry that saw large numbers of venues, organizers, tech firms and clients consider, experiment with and adopt hybrid approaches while Covid-19 ravaged much of the industry for a prolonged period, some only now seeing daylight ahead.

“A key problem with getting a firm baseline on hybrid event growth numbers over 2020-2021 is that the events industry itself still lacks clarity on the concept. Hybrid, virtual, digital, online, streaming – a lot of people just aren’t clear yet on what is what,” notes Convention Centre Dublin Head of ICT Craig Colley. “And then there are new tech terms and concepts gaining ground, like Unified Communications as a Service (UCaaS), adding to the confusion. It will take a while to sort out, but meanwhile it’s rather difficult to pinpoint just how many venues, organizers and customers are in the hybrid space, and to what extent.”

## THE DEFINITION ISSUE

A sampling of hybrid event definitions used by various venues and organizers:

- An event combining offline with online (Bano)
- A physical live event with remote attendees (Communique Conferencing)
- An event consisting of both virtual and in-person parts (SlideLizard)
- A hybrid event is one that uses a combination of in-person and digital elements, tailored to each audience for optimal experiences (Freeman)

The fact that the term hybrid is still somewhat fluid as far as meaning is concerned has led many industry observers and participants to describe hybrid events on the basis of characteristics rather than a clear definition. As Erwin Balkema, CEO of Dutch events technology company Bano sees it, hybrid events are meant to “combine the offline and online with purposeful interaction” and come in four essential forms:

### HYBRID EVENTS CORE FORMATS

- 1 | Live presenters and online attendees
- 2 | Live presenters and live and online attendees
- 3 | Online presenters and live attendees
- 4 | Live and online presenters and live and online attendees

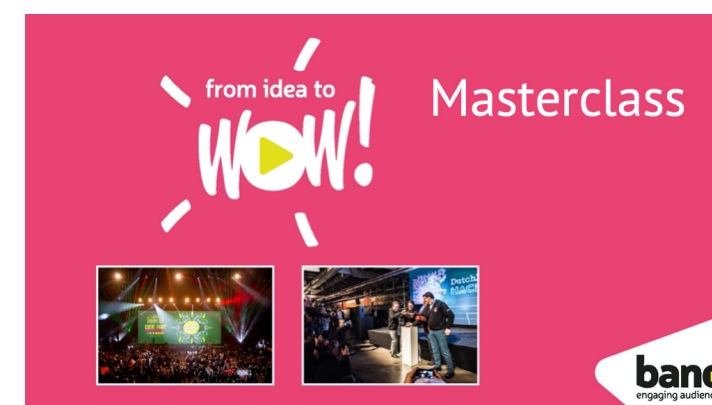
“You can waste a lot of time on the definitional question. The important thing is to keep it simple and not get wrapped around the axle,” says Balkema, “and come to grips with the fact that however you define it, it’s about live, online, and a mix of the two. It’s that mix, the interaction, that makes it hybrid. And the possibilities in this realm in terms of applications, features and formats up to hub-and-spoke models reaching 235,000 people plus are, if not endless, vast, and still in their infancy. And exactly because we still encounter so much confusion in our market about what hybrid is and can do, we continue to invest heavily in customer education.”

Bano, which serves clients ranging from Novartis and Pfizer to HP and BlueYonder, recently released an informational slide deck on Hybrid.



ERWIN BALKEMA BANO

*“However you define it, it’s about live, online, and a mix of the two. It’s that mix, the interaction, that makes it hybrid.”*





STEPHANIE DUBOIS SAP

*“You have to think carefully about your event and your objectives, given that some interactive tools simply won’t work with too large of a crowd.”*

To date, the principal types of events to ‘go hybrid’ – this based on a range of inputs but still a limited overall data pile – appear to be the following:

**HYBRID EVENTS PRINCIPAL USES**

- Conferences
- Trade Fairs
- Workshops
- Congresses
- Exhibitions
- Seminars

Of these, a number of venues, organizers and customers see trade fairs and exhibitions as the most challenging, depending on the industry, as they depend so heavily on the ‘touch, feel, see and smell’ experience of the attendee. “Attending a culinary exhibition remotely has its constraints,” quips consultant Nico Meyer.

As for the types of interaction that hybrid platforms support, the main ones at this stage appear to be:

**HYBRID EVENTS PREVALENT INTERACTIVE FEATURES**

- Discussions
- Chatting
- Bidding
- Networking
- Q&A
- Polling
- Gaming
- Brainstorming

“You have to think carefully about your event and your objectives, given that some interactive tools simply won’t work with too large of a crowd,” says Stephanie Dubois, Head of Global Event Operations, SAP. “Chatting or brainstorming can be very useful in smaller meetings, but it simply wouldn’t fly when we have one of our bigger events like SAPPHIRE NOW and close to 50,000 people online.”

Hybrid events in turn are increasingly becoming part of a larger mix of live, entirely virtual, and hybrid event programs, the variations that organizers are using including:

**HYBRID IN COMBINATION WITH OTHER EVENTS**

- 1 | Virtual events followed by hybrid events
- 2 | Live events followed by hybrid events
- 3 | Hybrid events followed by virtual events
- 4 | A succession of live, hybrid and virtual events

**THE VALUE PROPOSITION**

The basic why or known benefits of hybrid events are several, but by the same token, a still incomplete list. Often cited:

- **REACH.** the ability to traverse distance and time-zones to reach an event’s intended audience, enabling remote attendance and expanding the number of (potential) viewers.
- **CUSTOMIZATION.** the ability to capture, edit or augment content (for instance with logo’s video’s, graphs, sponsorship messaging).
- **RE-USE.** the ability to distribute content repeatedly/on demand and or repackage and repurpose it.
- **EDUCATION.** the ability for an event to serve (extended) educational purposes at a lower cost (remote learning principles).
- **DATA EXPLOITATION.** the ability to track, capture, analyze, and otherwise use attendee (user) data towards designated objectives, e.g. marketing, sales, issue awareness, compliance-relevant figures.
- **SUSTAINABILITY.** the ability for event attendees to opt for remote and forego live attendance, keeping the event’s overall carbon footprint lower (‘one less person flying there’).
- **SAVINGS.** depending on the event, technology, business model and circumstances: doing an event hybrid can in many cases drive costs down through higher remote viewership, or simply be far more affordable for the audience to attend (remotely).
- **MARKET DISCOVERY.** the ability to identify, contact, and or attract event visitors who could become new future contacts, clients, or first time ‘live event’ visitors (studies indicate people who have attended events virtually are more apt to visit it live the next time than people who never got/had a virtually impression of it before).
- **RECRUITING.** the ability to tap into a larger universe of potential prospective job or volunteer recruits.
- **ECO-SYSTEM CREATION.** the ability, through planned and persistent effort, to build or drive towards a virtual or hybrid eco-system around particular events, a brand, or an organization.

**AMONG KEY BENEFITS**

- Reach
- Customization
- Re-use
- Education
- Data Exploitation
- Sustainability
- Savings
- Market Discovery
- Recruiting
- Eco-system Creation

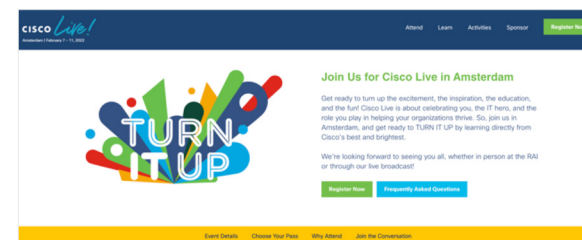
“That value of hybrid – the industry, customers and especially the larger tech world are still trying to figure out what all of the possibilities are,” sees Oscar Cerezales, Chief Strategy Officer of the MCI Group. “In that sense, we as an industry are running well behind several others, who for over a decade now have been building digitally based ecosystems where on- and offline have proven to pay solid dividends. Think about such sports companies as Nike, retailers like Amazon and a host of Gaming companies: all able to bridge the live-virtual divide quite effectively, and monetize accordingly. In that sense, we’re in our infancy here – a catch-up race.”

## “As an industry, we’re late to the Hybrid game – I’d say Sports, Retail and Gaming are about a decade ahead”

**OSCAR CEREZALES** Chief Strategy Officer, MCI Group

### HYBRID EVENTS & HYBRID WORK

“Hybrid events should not be viewed in a vacuum,” adds Gerd De Bruycker, Marketing Director EMEAR for Cisco. “You can look at hybrid and emphasize events, as if it’s an entirely separate thing, but in reality you’re looking at a much bigger development: the world-changing concept of hybrid work. From our perspective, as the biggest networking technology company in the world and the global leader in hybrid work, events are an intrinsic part of the change that is now underway.” Cisco, which is somewhat unique in that it both a major tech firm, a platform provider and the organizer of its own major events – the flagship being Cisco Live! – sees all things hybrid folding into the larger concept of hybrid work.



The new Cisco Global Hybrid Work Index or HWI launched in October 2021, due to be updated quarterly, examines how people’s habits and technology interactions have permanently reshaped work due to the Covid-19 pandemic. Its findings underscore that (hybrid) workers now expect far greater “flexibility, accessibility and security” than ever before, and that businesses need to adapt to facilitate this change. The HWI is being viewed by various authoritative observers as a new, unique identifier of emerging global work trends based on millions of data points and extensive surveys encompassing people, technology and business insights.

A wide range of tech firms other than Cisco have also jumped into the hybrid work space, notably Microsoft. The company initiated a major innovation effort at its headquarters ‘Hive Innovation Lab’ in November 2020 to develop and realize its vision of ‘The Future of Hybrid Work.’ The effort, still ongoing, features projects such as development of new workspaces, new online meeting rooms, and new technological interfaces to streamline remote and in-place online collaboration.

“In this larger context I’m fully convinced hybrid events and hybrid work will coalesce further in the future around hybrid work’s core advantages and objectives,” sees Cisco’s De Bruycker. Among these larger objectives are:

### HYBRID WORK OBJECTIVES

- Achieving better life-work balance;
- Achieving more productivity per hour (think less distractions, more efficiencies and project input immediately available to workers);
- More working hours in a day due to less commuting;
- Less office space required to perform work;
- More flexibility (choice) in terms of what work will be performed where and when;
- Ensuring safety and security around the hybrid workforce;
- Improving management hybrid work monitoring capability; and
- Environmental benefits of a smaller carbon footprint due to less commuting and less office space use.

“This whole area offers significant opportunity for the events and many other industries,” concludes De Bruycker, “as the output of events can be increasingly put to use to serve and strengthen progress elsewhere in the hybrid domain. An event’s content, an event’s data, will be able to reach and stretch further, enhancing its value.”



**GERD DE BRUYCKER** CISCO

*“I’m fully convinced hybrid events and hybrid work will coalesce further in the future around hybrid work’s core advantages and objectives.”*

## 2. TRANSITION

On the cusp of 2022, where does the events industry stand on hybrid?

### WHERE ARE WE NOW AS AN INDUSTRY?

Asked *where are we now as an industry?* the answer of most respondents for this study comes down to a state of flux – an industry in transition, but not very smooth, uniform, or organized. “We get plenty of impressions from our members about where they stand and what they are working on,” observes AIPC CEO Sven Bossu, “but it has a confetti aspect to it: we see small gains and glitter, but getting a clear picture of larger developments and how our universe might be changing is much harder.”

So what defines the current state of play of the hybrid events market?

Where do we stand at the cusp of 2022?

What rough parameters can be outlined, borders drawn?

A summation of the thinking of over 30 interviewees, 75 articles, 30 reports, and a variety of more than 60 marketing folders, flyers and webpages offers the following overview:

### CURRENT STATE OF PLAY 5 KEY CHARACTERISTICS

- 1 | Market definition still lacking
- 2 | Demand for live persists
- 3 | Not there yet on tech
- 4 | Feature demands increasing
- 5 | Business models in flux

### MARKET DEFINITION STILL LACKING

“Driving the changing mix of hybrid events is the growing sophistication of organizers and clients when it comes to the possibilities hybrid offers to accommodate event goals, audiences, and event ROI calculations,” sees Ori Lahav, Vice President Clients & Operations Kenes Group, and President IAPCO. “At the same time, as a global leader in the events world, we see that the hybrid market, to the extent that one can call it really new, is still ill-defined, and that many clients and venues are still struggling with giving hybrid a place. Unhelpful in this regard is that there are many new hybrid players entering the events industry who are as of yet inexperienced, and don’t necessarily always place customer interests first.”

Among the factors different observers see as to why it is taking so much time for the evolving market to settle and become better defined:

- The stop-start-stop-start state of the events industry as a whole due to the pandemic, with the disruptive effects of successive Covid-19 lockdowns, re-openings and restrictions preempting or precluding venues’ and organizers’ normal planning, trialing, investing, developing, testing, and roll-out steps of major new industry tools and approaches.
- The as-of-yet unsettled mix of hybrid service providers, many working together in new partnering arrangements, who can be seen to fall into four broad categories:
  - Venues using their own IT/AV and platforms
  - Organizers using their own platforms partnering with or otherwise facilitated by venues
  - IT/AV tech companies with their own platforms turned organizer, most hosted by venues but some having their own studios
  - Customers who own their own platforms and are hosted by venues



**ORI LAHAV** Kenes Group

*“As a global leader in the events world, we see that the hybrid market, to the extent that one can call it really new, is still ill-defined, and that many clients and venues are still struggling with giving hybrid a place.”*





- The pandemic's effect on the normal, gradual, client-side adoption of major new tools and approaches. With customers themselves scrambling to understand and use the many new hybrid tools, platforms, programs and, in many cases, collaborate with event organizers new to them, many have yet to settle on a longer-term strategy, support for and sourcing of their hybrid needs. "Who all will be part of the hybrid market in terms of customers is as of yet not entirely clear," points out Oscar Cerezales of the MCI Group, "as some have not decided yet to what extent they may want to partake in it. Some industries and associations are clearly intent on getting back to just live events – to which extent they will eventually go hybrid is conjecture at this point."
- The fact that hybrid technology is being developed in many places at the same time, separately, by separate companies with diverse backgrounds. "There are dominant players, there are the big tech companies we all know leading things, but there are also a lot of smaller, newer growth firms in this space, all the way down to Greenscreen builders and App makers" notes Tejal Hartalkar, Research Analyst at Grand View Research. "the universe of hybrid is not fully known yet, and it has yet to come together to form its own ecosystem."
- The lack of clarity on the number, size and influence of tech companies who not only want to run their own platforms, but also become organizers. States Hartalkar: "various big tech players already dominate the in-house events market, and some are showing clear interest in expanding into external events. Just how much competition they will pose to existing professional congress organizers (PCO's) has yet to be seen. When we do, the actual shape of the marketplace will be far clearer."

#### DEMAND FOR LIVE PERSISTS

While most of the industry is abuzz about hybrid, there is also a contrarian view: that hybrid is a hype, and that nothing beats good old live events.

Marta Gomes, Deputy Executive Director Sales and Marketing Division for VIPARIS, sees many more traditional clients, including associations and business forums, anxious to get back to live events. "While some customers successfully partook in streaming to survive, here in Paris, with several long periods of lockdowns, overall the pent-up demand for and sentiment in favor of live is just huge." She also observes that for some sectors, hybrid has its limitations, including parts of the exhibitions

industry. "See it, touch it, feel it: people going to exhibitions want the hands-on experience. They're there to examine the new products. In many trades, there simply is no substitute to doing that."

Reflects Brian Nash, AV Director of ICC Sydney: "When it comes to hybrid, we all have to realize the main experience is still in the room – it's not online. As such virtual offers reach, certainly, but it doesn't and cannot give attendees the depth of experience that face-to-face offers. There is hence something of a natural limitation to hybrid, and that means the events industry needn't worry about relevance. Nothing, ultimately, replaces human contact."

"We hadn't had a huge amount of requests until recently, though these are now starting to come in," states Craig Colley, Head of ICT at The Convention Centre Dublin. "Whether that's a true reflection of the entire market or somehow culturally bound, unclear, but it signals to me that until recently hybrid was not viewed as a feasible option for some, particularly anything that touches networking. Ironically, just before the pandemic struck, we were quite busy redesigning our facility to further enable networking, setting up forum areas, creating special outdoor places, and equipping our coffee shop area with a new digiboard. That networking, that human contact – it remains the core of the industry, hybrid or no hybrid."

"Hybrid events are a reality for our industry," says Juliana Lopez, CEO of the Cartagena de Indias Convention Center and president of Grupo Heroica. "However, I believe we still have a long way to go in order to provide a genuine virtual and physical experience. At this point, probably as a result of confinement, clients in Colombia are specifically requesting fully physical events."

That an apparent disinterest in hybrid is not just present among certain types of clients is clear from the input provided by the global events planning director for one of the world's largest banks. She points out from her office in New York City that "we do hundreds of events per year, and streaming yes, but we simply haven't had the internal demand for hybrid. I'd also like to point out that the cost for hybrid events is significant, and for us there's no ROI in hybrid over streaming a live panel discussion. Finally, and we're not alone in this in the finance industry, Risk, Legal and Compliance also have a say in how we do things. And as of yet, they're not very enthusiastic about hybrid."



**JULIANA LÓPEZ**  
Cartagena de Indias Convention Center

*"I believe we still have a long way to go in order to provide a genuine virtual and physical experience."*

### NOT THERE YET ON TECH

“Hybrid events are essentially two parallel events that require three teams to run them: one for the live one, one for the virtual one, and one to coordinate and interface between them,” states Michiel Middendorf, General Manager GL events The Hague World Forum. “From there the variations expand, depending for instance on your re-packaging and re-use of the feeds. The live and online events have different requirements in how you run them, as the latter, to make it a successful, engaging experience, needs to be designed much as a TV show is. The better the interaction, the higher the engagement, and for those who cannot be somewhere live, creating that engagement, that connectivity, is key.”

“It took us four months with our technology partner Squares to get our platform and studio up to the level we wanted it, and what we are noticing is that the need to adapt and innovate and progress on technology is a constant, and that not everything you want to do is already available or even feasible. Technology at this point is well ahead of where it was a year or two ago, but to anchor hybrid long-term, to make it an ingrained, go-to staple of our industry, will require yet a further evolution. We can’t quite do everything the clients want yet, whether it’s automated translation services or how people would like to interact in certain types of meetings – we’ve made huge strides, but the tech isn’t all there yet.”

“Hybrid in effect means TV production, and will continue to move further in that direction. This will have its impact on live event programming as well.”

**MICHIEL MIDDENDORF** General Manager, GL events World Forum The Hague

### FEATURE DEMANDS INCREASING

Blogs, articles, studies and feedback forms indicate that the 2020-2021 expansion of the hybrid events market is resulting in a growing (remote attendee) client demand for features beyond standard networking and engagement on hybrid event platforms. Most of these hail from other, non-events industry hybrid platforms, including the gaming industry. As such – in line with the preceding section ‘Not there yet on tech’ – they reflect an increasingly sophisticated, demanding consumer who, already equipped with such features in other realms, expects the hybrid events industry to evolve ever further, soon.

Among those increasingly requested hybrid event features:

- A social wall (event related social media aggregation)
- Navigation aids (to simplify movement around a virtual event)
- A virtual reception desk (to perform an online concierge function)
- A custom environment (everything tailored to the customer/brand/event)
- Attendee footprinting (ability to track online visitor routes throughout event)
- Browser-based solutions (no more need to download software to attend event)
- A standard analytics package (versus many different mostly customized types)
- Add-on special functions (such as the possibility of providing translation services)
- Add-on App packages

### BUSINESS MODELS IN FLUX

Oscar Cerezales, Chief Strategy Officer of MCI Group, sees a prolonged period of business model evolution ahead before there is a measure of real consolidation. “Business model is a buzzword, and hybrid is a buzzword, for starters,” he notes. “What we are seeing so far is that there is no general model, but rather that there is a combination of different models developing based on the country, the client, and the offering, and that those models are being structured around several building blocks. These include the value proposition, the costing structure, the potential revenue channels, the mix of audiences, and the resources available, internal and external.” He stresses that “hybrid is a new offering, not a business model, and the reasons why so early in this transition we are still trying to make a particular business model land is that we lack experience and expertise in this area.



**OSCAR CEREZALES** MCI Group

“There is a lot of noise out there, including by tech companies, but we do not have any true hybrid event KPI’s yet; the margins are unknown; the costs are still hard to fix and compare; and we don’t know our economies of scale yet.”

There is a lot of noise out there, including by tech companies, but we do not have any true hybrid event KPI's yet; the margins are unknown; the costs are still hard to fix and compare; and we don't know our economies of scale yet."

Offering a larger perspective, Cerezales points out that "as an industry many have been selling square meters for 50 years, but actually, not unlike airports, we are selling economic growth and social transformation. Figuring out what hybrid can add will take time and much outside expertise, which is why for instance we are drawing in experts from areas such as neuroscience, sociology, anthropology, data visualization and storytelling. We see amazing outputs when these experts connect with our account and project managers, strategic planners, coders, copywriters, tech talents etc. What we do know is that ultimately hybrid will be more about the design, the financials and the strategy than the technology."

MCI Group hybrid explanation sheet



### 3. ONBOARDING

What does it take to partake in the hybrid world, and what are the basic attributes and resources needed to serve as a hybrid events provider or facilitator?

The term Hybrid As A Service or HaaS has yet to come into being, but the requirements as to what it takes to deliver a hybrid event (service) are rapidly coming into clear focus. Venue operators, event organizers and IT/AV tech providers in the aggregate point at the following 12 "hybrid onboarding requirements," as a European venue manager phrases it:

#### A HYBRID PLATFORM

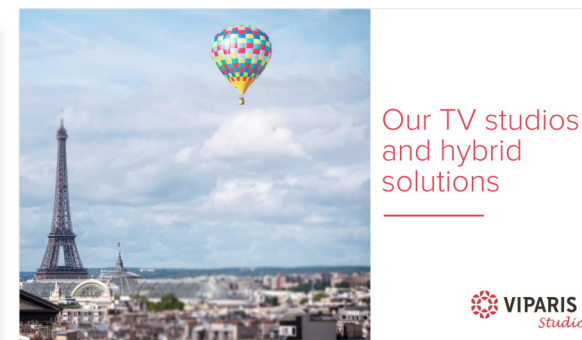
To do a hybrid event, whether it is owned or operated by a venue, organizer or tech company, requires a platform capable of running one. "Early in the pandemic there were probably several thousand of them worldwide, many developed by small companies that have since fallen by the wayside for lack of quality, scale, clients or local market," sees Bano CEO Erwin Balkema. "There was a lot of tinkering. More recently this year major contraction has taken place, still ongoing, with mergers, buy-outs, and the better quality platforms building a track record and becoming

more known. Also the demands of those platforms – like not just interactive features but doing registration, user assistance and analytics – are becoming clearer. Meanwhile, partnerships around platforms are becoming ever more important: you want the most reliable, durable relationships to build your business on, from all sides.”

Causing some confusion is the terminology used in different sectors: many cutting edge tech firms do not use the word hybrid except in the small print, preferring to use such terms as Digital Experience Platform or DXP. Other much used terms for hybrid platforms are names such as ‘digital events platform,’ ‘virtual platform’ and ‘studio’.

A few examples of venue-based platforms:

- ‘Engage’ of the CTICC in Cape Town, South Africa
- ‘ICC Sydney Connect’ in Sydney, Australia
- ‘The Javits Broadcast Studio’ at the Javits Center, New York, USA
- ‘Viparis Studios’ at VIPARIS, France



How long does it take to develop a professional-grade hybrid platform? Depending on the start position (those doing digital / hybrid events before the pandemic having a big head start) and the resources engaged, anywhere from one to four months, according to a range of sources, followed by time to test and work out any major bugs.

## TECH INFRASTRUCTURE

“As a venue you have to be up to date enough in terms of your IT and AV infrastructure to do hybrid,” sees Craig Colley, Head of ICT of The Convention Centre Dublin, “and for some that’s a hurdle given that most convention centres are well over 30 years old. This may be the biggest investment if you want to benefit from hybrid. Consider you need at least sufficient power with good wiring, a lot of bandwidth, a very robust WiFi capability, and in-built redundancy such as we achieve with our two fully separated control rooms and primary and back-up Cisco IT infrastructure. Many venues have a studio or multiple ones, and they can be convenient and highly useful and marketable, but it’s not a pure necessity for hybrid. We don’t have one, but our IT infrastructure is tops, and we proved it, again, by hosting the Irish parliament during the worst of the pandemic over July 2020-July 2021.”

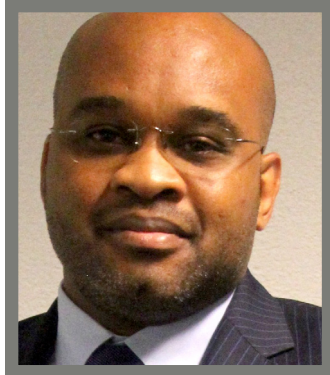
Notes Colley: “If you have the right IT infrastructure and essential elements like the 4K cameras we have, you can make the client a studio anywhere. That’s our approach for now: be a highly capable facilitator with our virtual Event Rendering Service able to serve the client or organizer with whatever platform they have, and more than deliver on the tech support side.”



CRAIG COLLEY The CCD

“With hybrid, people can do BYOP or ‘bring your own platform,’ but no one can do BYOI or ‘bring your own infrastructure.’”

CRAIG COLLEY The Convention Centre Dublin



**SHERMAN BONOFACIO**  
The Security Company

*“Three days of live hybrid broadcasts before a live ‘field lab’ audience of 9,000 people featuring talent from 42 nations reaching 380 million people and 200 million song voters during the peak of the pandemic – rather a unique risk profile.”*

### BUSINESS CONTINUITY AND CRISIS PLANNING

The Eurovision Song Contest 2020, hosted by Ahoy Rotterdam in the Netherlands in May of 2021, might be dubbed the mother of all hybrid events when it came to the public song voting interaction. “At the outset we knew this event had the largest risk surface possible, and with that, a herculean task as regards ensuring business continuity, preparing for potential crises, and risk awareness,” notes its Health, Safety and Environment (HSE) Manager Sherman Bonofacio. “Three days of live hybrid broadcasts before a live ‘field lab’ audience of 9,000 people featuring talent from 42 nations reaching 380 million people and 200 million song voters during the peak of the pandemic – rather a unique risk profile.” Planning to prevent problems, and to manage them if they do occur, is a must for the organizer, as is engaging all the relevant stakeholders. While it may just involve ‘being ready for troubleshooting’ with small events, larger hybrid events demand proper business continuity and crisis planning.

Among the larger chunks of the risk portfolio surrounding the Eurovision Song Contest: preventing a Covid-19 outbreak, crowd control, terrorism, protest actions, hacking, and technical glitches, notably hybrid technology. “The hybrid aspect received special care both in the run-up to and during the 18, 20 and 22 May 2021 live broadcasts, from power back-ups and other redundant systems to broadcasting workarounds. We never considered it a crisis waiting to happen, but it took an almighty effort to ensure that – we had no less than 239 risk scenarios in the playbook.” In the end, Eurovision 2020 went down as an overriding success, with only a few glitches and near misses.



### CYBER SECURITY

“Our Cisco platform for hybrid events has front-to-end integrated security features of the highest order from registration through Webex software installation,” states Cisco EMEAR Marketing Director Gerd De Bruycker. “In fact, what not a lot of people know, we are the world’s largest cyber security company. And that in-built, comprehensive, top-tier security is exactly what hybrid demands, for significant problems can’t just ruin the event but the relationship, and tarnish one’s name.” While a growing number of venues, organizers and tech companies who have their own platform do or appear to be paying significant attention to cyber security, standards for doing so are as of yet varied. “But that clients are demanding some level of it when they have 125K remote attendees who are also using an App is increasingly clear,” notes De Bruycker, “and that is one of those areas where we differentiate ourselves.”

“Remember, this is an IT-based business model, so you want to guard against cyber risks all the way to ransomware.”

**GERD DE BRUYCKER** CISCO

As part of your extended cyber security, you also want to make certain you cover your due diligence requirements. Marcel Boekhorst, CEO of Signum Interfocus, a European due diligence provider for local governments and multinationals such as KPMG, warns that “screening of new partners and personnel is vital, especially if they’re the ones with their fingers on the keyboard controlling your broadcast. The better your information position on your prospective partner and new technicians, the better the decision, and the sounder you’ll sleep.”



**MARCEL BOEKHORST**  
Signum Interfocus



### CAPABLE, AND ENOUGH STAFF

There is no established median yet for what is needed to run a hybrid event operation, but certain roles, slots and relative numbers are solidifying. “To run a full-up hybrid event, which basically means running two parallel events, you need three teams,” says MCI Middle East Managing Director Ajay Bhojwani. “One for offline, one for online, and one to match them up. Now for our initial hybrid meetings we did in Dubai back in September 2020 linking audiences locally with speakers in Europe and elsewhere, those were small teams. For things we are doing this year in conjunction with the global Expo 2020 Dubai, now that’s of a different order – several dozen.”

Coming down to hard numbers, Michiel Middendorf of GL events World Forum The Hague cites that he has a team of “about 15 people for running my hybrid events. But for really big or challenging ones, such as for the International Criminal Court we and our tech partners typically will pull in more. The biggest thing to watch however is not the numbers but their abilities – with everyone from former TV producers to more hardcore tech people on board, hybrid is definitely pushing us towards a more digitally capable workforce.” A quick rough rundown on hybrid event staffing requirements based on inputs from seven venues and four PCOs:

- 2 – 4 hybrid-specialized salespeople
- 2 – 4 hybrid production/program designers (TV experience preferred)
- 1 – 2 registration programming specialists
- X number of camera people, potentially with back-ups for longer events
- 2 – 6 control room technicians to run the event, depending on complexity
- 1 director and back-up for managing the live event
- 1 director and back-up for managing the online event
- 1 coordinator to track and manage the off-line and online interface
- 1 tech repair person on stand-by
- 1 specialist to look after the IT/AV infrastructure and equipment
- Optional: 1 cyber security specialist on site and or remote support team
- Optional: 1 – 2 specialists in event data tracking/processing
- Optional: 1 – 2 specialists in editing/program making for post-live repeat program making

Stacked or sequenced hybrid events, where the need for staff to be doing things all at once is usually less, is increasingly being held out as a hybrid cost-saver.

### TESTING

“You absolutely have to do a detailed on the ground run-through of any new systems or arrangements you’re setting up,” stresses Cape Town International Convention Centre Managing Director Taubie Motlhabane, “and you have to test it yourself like a client would. Robustly. Be your own user. And then test everything before a specific event. It’s not just about checking for problems but also learning and ensuring you are generating the effect you want for the client. We are all still in a learning process on hybrid as part of our larger effort to make digital a bigger part of our fabric, and testing is not just growing in understanding, but also an opportunity to draw that client closer, to make that journey together. And that part, that’s also strategic – seizing the opportunity to strengthen the relationship.”



**TAUBIE MOTLHABANE**  
Cape Town ICC

“ You have to test it all yourself like a client would. Robustly. Be your own user.”

**TAUBIE MOTLHABANE** Cape Town ICC

### TRUST

“All hybrid models require trust to make things work,” notes industry observer and MeetingMatters Event Strategist Nico Meyer, “as no one is an island in this realm.” He points out that collaboration “reaches much further than just making the tech work: it’s also about establishing the possibilities for an event, the program design, coordinating directorship and the entire post-live event side of the equation.” You’re always clasping hands with another party to make the program and the technology work. Then there is the fact that you are sharing personal data of all kinds – in these days of privacy-mindedness, a vital function. Can I trust that



**MICHEL MIDDENDORF**  
GL events World Forum The Hague

**“You have to make a conscious decision to embark on the hybrid road, to develop your knowledge and capabilities, to give the effort continuity and direction, for if you don’t, you’ll flounder.”**

partner with all of that information going through their system, their pipelines? Can someone tap into my list of registrants, get a hold of their credit card data, see the metrics I am applying to their viewing of parts of the program? And from there you get into things like content – who all gets to see it, capture it, share it? Trust is fundamental to hybrid. But that’s also a big opportunity right there – keeping the customer close, being the trusted advisor.”

**DATA PRIVACY ASSURANCE**

In many ways an extension of the foregoing trust point, data privacy is an issue around hybrid events, all the more so because as business models and the make-up of hybrid events evolve, knowing who has access to what data and sees and uses what data is becoming harder to keep track of. While venues, organizers and users report few problems with private data to date, the issue is regarded as a challenge. “Great that we can and might want to track all these metrics to expand the ROI for the client, but it also means that unless the client has the platform, it’s the venue or organizer who will be holding and pumping around a lot of data,” notes Marta Gomes, Deputy Executive Director Sales and Marketing Division of VIPARIS in France. “And with the European Union’s GDPR regime, we take that extremely seriously.”

**INTENT**

“You have to make a conscious decision to embark on the hybrid road, to develop your knowledge and capabilities, to give the effort continuity and direction, for if you don’t, you’ll flounder,” observes Michiel Middendorf of GL events World Forum The Hague. “As a linchpin for investment, if not the foundation, that belief that you’re about to do something consequential and move in that new direction just has to be there. Tepid little steps are unlikely to get you there, especially if you’re in a competitive environment.” Middendorf points out that “you have to have confidence in adopting hybrid, as the client has to have that as well. You’re partnering in a way, and that client has to be able to put his or her faith in you, that you’re on that journey and they should come along. Stepping into it half-heartedly is asking for trouble, in multiple respects.”

**MARKETING AND CUSTOMER EDUCATION**

Business 101 courses tell us for an offering to be sustainable it needs a long-term market. Observers and market participants alike are finding that hybrid is challenging because both the offering and the market are still quite fluid at present. “It’s a somewhat confusing and diverse picture all around,” says Oscar Cerezales of MCI Group. “The hybrid events marketplace appears a near certainty, but how equally distributed in different parts of the world it will be can only be fully answered when circumstances return to something near normal. That’s when we’ll see what people really want for the long run, based on the offerings available then, and where, and how much of it. And an important part of that will be tied into effective marketing, notably between now and then.” Less clear yet is how that marketing should be done.

“You have to show how it works, you have to educate that client as to what’s possible, engage, demonstrate,” says MCI Middle East Managing Director Ajay Bhojwani. “That’s where we as organizers with established customers have a big advantage over tech companies trying to carve out space in this area. Hybrid is a huge opportunity for connectivity with the client, who is also taking risks, and it will probably take another 6 to 9 months for things to shake out and many customers, especially generally more conservative ones like associations, to fully engage.”

**FLEXIBILITY ALL AROUND**

“We have a platform but we are platform agnostic,” observes Brian Nash, Director of AV Services of the International Convention Centre Sydney, “and are so by design as we aim foremost to accommodate the client. If that client has his or her own ideas about the program and a platform preference, we facilitate.” Given that hybrid events are a much-evolving area and that client interaction is the cornerstone of event planning, having the flexibility or agility to adapt to client wishes is increasingly regarded as a *sine qua non* for successful hybrid events. As important: flexibility on the part of the client, particularly there where familiarity with what hybrid offers is low.



**AJAY BHOJWANI**  
MCI Middle East

**“You have to show how it works, you have to educate that client as to what’s possible, engage, demonstrate.”**

## 4. UXP TO DATE

What do customers think of their hybrid experience to date, and what has their journey been like up to this point?



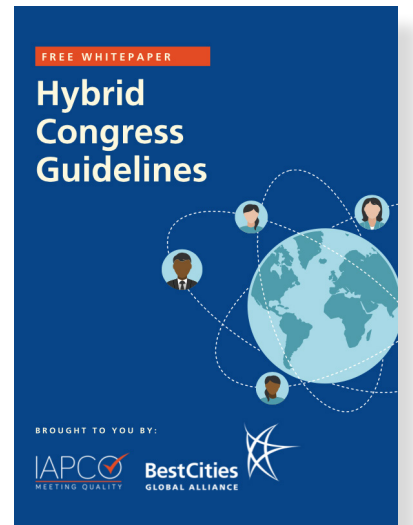
MARTIN BOYLE IAPCO

### SKETCHING THE JOURNEY

Before the User Experience (UXP), there is the ‘how to get to that experience.’ IAPCO CEO Martin Boyle states that “early on in all this our PCO membership saw customers struggle with hybrid, and initially most conversations to help clients figure out how hybrid works, and how to make it work for them, were bilateral. With the pandemic carrying on into 2021, it became clear we had better assist customers and the industry at a more systemic level on this point, which is why together with partners we drew up advice on hybrid from the UXP perspective: how to use it, how to bid on a hybrid event.” The document, released in April 2021, has since found widespread use among a wide range of hybrid event stakeholders and still stands as a uniquely practical piece of guidance in this burgeoning field.

The guidance aims to “facilitate further fruitful cooperation between associations, PCOs, and host destinations in the delivery of Covid-secure business and professional events,” spoke IAPCO President Ori Lahav at the time of the release, underscoring the collaborative nature and necessity of hybrid events. The title of the guidance, delivered as a white paper, was more to the point: Hybrid Congress Guidelines.

“That such guidance was necessary underscored for us the magnitude of the change hybrid represents,” states Boyle, who observes that “there was an evident, overwhelming need to sketch out and help with the basics, even before we get to designing the experience, shaping the experience – the whole industry first needed to simply come to grips with the How. Further to that magnitude, just about each and every one of our 138 members, who together represent the accredited gold standard for our craft, has been busy with hybrid one way or another for the past twenty months. That need and ‘market ask’ to educate, to introduce, to guide, that demonstrates just for how many customers hybrid as an experience is new.”



“Purely in terms of numbers, virtual and as part thereof hybrid has become the event standard default during Covid, and thus the standard default UXP.”

MARTIN BOYLE IAPCO

### HARD NUMBERS ON VIRTUAL EVENT ATTENDANCE INDICATE SOLID GROWTH

Average participation in IAPCO member organized events rose from 370, mostly in-person in 2019, to 480 mostly virtual attendees in 2020. This came on the back of a drop in total number of events from just over 20,000 in 2019 to just under 13,500 in 2020. The result? A clear demonstration of the opportunity to reach much larger audiences through technology than through in-person only events.



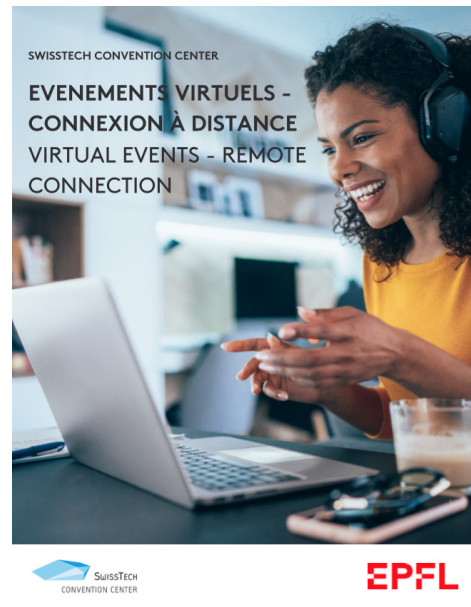


**JULIANNE JAMMERS** SwissTech

**“Putting out simple instruction flyers on the basics for experiencing an optimal event definitely helps, making for a much smoother process at the individual level.”**

Seeing the need to not just offer client organizations guidance on hybrid, a growing number of venues, PCOs and even tech companies entering the hybrid space are putting in an expanding effort to do the same for individual clients. “Call them delegates, call them remote attendees, call them the online audience, but you need to assist them as well and as much as your live guests,” finds Brian Nash of ICC Sydney. “We’re getting much positive feedback for instance for our efforts to consult with our clients and educate them on the attendee journey. We offer a conceptual framework for a person’s place in an unfamiliar environment: what to expect, what to do, where to go, just like the pathway attendees receive for a live event.”

“Similarly we have found that just helping clients with the A-B-Cs of virtual and hybrid events is much appreciated,” says Managing Director SwissTech Convention Center Julianne Jammers in Lausanne. “Putting out simple instruction flyers on the basics for experiencing an optimal event definitely helps, making for a much smoother process at the individual level.” Her venue, which is located on the Swiss technical university campus EPFL, and focuses on scientific and association events, has also found that such “experience-primer” instructions, guidance and information sheets can also be used as an integrated means of reinforcing other value messages. One is the emphasis that the facility places on sustainability. To this end, the center has produced a series of flyers sent to remote attendees before each event for the purpose.



## UXP SHARINGS

So what are some of the big findings around user experiences so far? A sampling:

### 1 | Choosing a provider, partner or other hybrid ‘go-to party’ can be challenging.

As the new Q4 2021 study of Grand View Research into the virtual events industry shows, the number of new companies entering the hybrid space alongside existing PCOs, tech companies and other ‘known’ providers is significant. This is particularly true on the tech side. The study gives all manner of overviews of some of the major new and current players operating as virtual event platform providers or virtual event management companies.

“Most are big established names,” notes industry observe Nico Meyer, “but many are taking new positions and new roles in the events market, which means that for many venues, PCOs and bigger customers looking for a durable partner, there is a search and evaluation process to move through. And that takes time, just as it does actually partnering and working out the kinks. For customers in particular, this too has become part of the hybrid experience, and sometimes an arduous piece.”

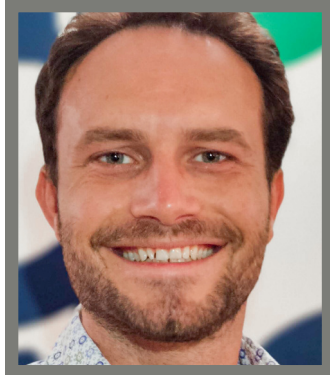
### 2 | Not everyone in ‘hybrid event advisory land’ knows what they are doing.

“You go to Accenture or McKinsey, you know you’re going to pretty much get world class advice,” says the Vice President of a Dutch international trading company. “Well, I’ve discovered, going to a ‘newfangled’ hybrid tech provider to get advice on hybrid events doesn’t entail that same kind of near-guarantee.” Wishing to remain anonymous, the executive in question says the company’s leveraging of its IT capabilities made it an interesting sparring partner “to see what it could do for us as a young, tech-driven company when it comes to increasing our event ROI – but before too long, its lack of actual event expertise became clear, and we turned elsewhere. But not after wasting quite a bit of time and effort.” From Colombia to the United Arab Emirates, the entry of many new players into the events market, particularly on the tech side, appears to have added to the challenges newcomer hybrid service customers face when finding suitable, solid long-term partners.

3 | The sponsor – attendee interface knows limitations. As Nils Molly of Germany-based INTERPLAN Congress, Meeting & Event Management AG foresaw in his article ‘New Challenges Going Viral’ last year, one of the bigger challenges around the user

### AMONG KEY VENDORS

- ALE International
- Avaya
- Cisco
- Cvent
- GES
- IBM
- Microsoft
- On24
- vFairs
- Zoom Communications
- 6Connex



**BAPTISTE BOULARD** Swapcard

experience is getting remote attendees to interact with sponsors. Exhibitions in particular have proven a challenge: how do you translate ‘please sit down on this designer chair, enjoy a drink and canape, and let me tell you about this new product’ into a workable proposition in the virtual realm? While several customers and venues contacted for this study raised the point that “sponsor breakout sessions and coffee corners have limited online traction,” different platform providers note that solutions for this beyond just “talking to an iPad on a pole” do exist, but that they are as of yet little known, little tried, and little used.

**4 | Internal organizational conservatism is the biggest hybrid adoption barrier.** Swapcard platform company CEO and co-founder Baptiste Boulard observes that “when working in concert with PCO’s we often see clients new to hybrid struggle with their mindset. Their reference is their old model, often decades old, and it’s hard for many to open up, to let go, to see and embrace the possibilities that hybrid offers. Most entrenched are various associations, while if you think about, they ought in many ways to be the ones moving fastest to exploit the many benefits hybrid has to offer for their members. That hold-out posture, that unwillingness to change one’s mindset: it’s the unfamiliar, it’s having to change – but they should and eventually they must.”

**5 | Hybrid is hard with certain large online audiences.** “We experimented quite a bit with hybrid this past year with different events, and one thing we came up against several times is that not all hybrid technology interactivity features are equally applicable,” remarks Stephanie Dubois of SAP. “When you have tens of thousands of people online, something like a chat function can get rather overwhelmed, and the same with someone online trying to pose a question to the presenter. It can work, but not when dozens of people are trying to do it at exactly the same time.”

“**Don’t see hybrid as a threat. See it as an opportunity.**”

**BAPTISTE BOULARD** Swapcard

**6 | For highly confidential gatherings, hybrid has its limitations.** “That is not criticism, it is simply a matter of fit-to-function,” observes Michel de Jong, who in his capacity as board member of the Chief Security Officers (CSO) Council of global security industry association ASIS International has a helicopter view of such sentiments. “I see clear hesitancy among my security colleagues around hybrid events insofar as it touches on highly confidential meetings. Where sensitive information is discussed, they don’t want cameras or microphones anywhere near, and they don’t want it recorded for later use either. There are technology work-arounds in some cases, but another worry for them is the screening, or absence thereof, of technical personnel involved in a hybrid broadcast. Who gets to see the content? Transmit it? Potentially store it? Colleagues from North America to Africa to Asia raise such concerns, and security directors for government agencies are even stricter.”

**7 | The ability for a platform to handle complexity is becoming a must.** “Based on the feedback from over 1,500 of our customers across the globe, our ability to handle complex events is greatly appreciated and valued,” says Swapcard CEO Baptiste Boulard, “and we have more and more clients who, once used to hybrid, are graduating to ever greater event complexity with purpose, as it means a higher ROI for them. Connecting events, using different Apps, online attendees moving from room to room and session to session all the while helping sponsors better track their event investment and following up with leads – the demand is growing. For a global end-to-end hybrid platform provider such as us we can clearly see that ‘ask’ to handle more trending upwards. Fast.”



**MICHEL DE JONG** COFRA Holding

*“I see clear hesitancy among my security colleagues around hybrid events insofar as it touches on highly confidential meetings.”*



**FRANK SCHOONHOVEN** Lumi

*“We have seen our business increase by over 300% in just two years, with a massive shift from physical to virtual during Covid-19.”*

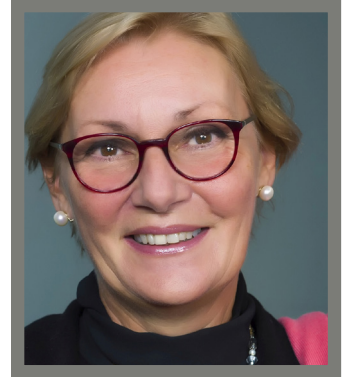
**8 | Cyber security is a concern.** Lumi is the global leader in hybrid shareholder and member voting events. States Netherlands Managing Director Frank Schoonhoven: “We have seen our business increase by over 300% in just two years, with a massive shift from physical to virtual during Covid-19. In 2019, we had some 2,000 live events and only 70 online. In 2020, we went down to 1,000 live events and up to 4,500 online. And for 2021, we’re looking at over 6,000 online events, mostly hybrid. While we are specialized with a singular focus on voting events for public and privately held companies, sporting federations, associations and the like, like many other hybrid providers we have found cyber security to be an important customer concern. We correspondingly place great emphasis on doing it thoroughly and doing it right, to the point of client banks performing Pen-tests on our system to ensure their proper functioning.” Anchoring that concern is the perceived risk around data privacy and data breaches, and the corresponding risk of reputational damage.

**9 | Platform white-labelling capability is becoming a must.** A range of PCO’s and tech providers mention the growing awareness of clients as to the branding possibilities that hybrid offers, and its direct link to sponsorship interest. They see that sponsors’ interest is keen on new opportunities across the board, from name placement on online registration screens to close cooperation with design teams to ensure the online component of hybrid events in particular optimizes all of the possibilities around brand visuals, messaging, and touchpoints. Various platforms that somehow limit or hinder third-party branding, especially ones of tech companies trying to showcase their own technology through logo placement and other devices, face growing criticism.

**WHY CYBER SECURITY FEATURES IN THE HYBRID DISCUSSION**

At the November 2021 VBN Security Summit, Avast company CISO Jaya Baloo pointed out that as of 2021, the average total cost of a data breach incident is US\$ 3.86 million. Market monitor Intrusion estimates that the global costs of cybercrime will reach US\$ 6 trillion this year, and US\$ 10,5 trillion by 2025.

**10 | Hybrid needs to be more defined.** “We are tracking what is being called ‘hybrid’ developments closely and look forward to examining the possibilities further, as we move into 2022,” says European Society of Cardiology CEO Isabel Bardinet. “In the past we ran the largest congress of its kind in Europe, the last one in 2019 having 36,000 delegates. With our members on the forefront fighting the pandemic, our need to meet has been palpable. Thanks to our visionary leadership team we were able to adjust fast when the pandemic struck. It forced us to cancel our 2020 congress at very short notice and switch to online, creating a TV studio-type program for the purpose, which we did this year as well. We do not know what hybrid is but having studied this we believe we need to develop an onsite and an online offer for our event in Barcelona in 2022. We are convinced that the events of tomorrow will be blended offers, onsite and online and are curious as to what ‘hybrid’ will be”.



**ISABEL BARDINET**  
European Society of Cardiology

*“In normal times we run the largest live congress of its kind in Europe, the last one in 2019 having 36,000 delegates. And with members in the forefront in fighting the pandemic, our need to meet has been palpable.”*



## 5. BUSINESS MODELS

How are providers monetizing hybrid, and what business models are emerging?

### THE SIMPLEST OF SUCCESS STORIES

“Sometimes making money on something new just isn’t that complicated,” says Craig Colley of The Convention Centre Dublin (CCD). “Since 2019, my IT department has made our Dublin venue hundreds of thousands just by providing clients virtual –including hybrid – facilitation services, all of it enabled by our advanced IT infrastructure. So we don’t so much do hybrid as facilitate it, including by selling bandwidth, and our many tech industry clients here in Ireland really love that. They bring the platform, they write the program, they do what they’re good at. And we do what we’re good at, helping with IT, design and other support services. And meanwhile as an IT department we’ve graduated to being a revenue generator, and having regular meetings with our marketing team.”

“ Sometimes making money on something new like hybrid just isn’t that complicated. For our part, taking a facilitator approach, we’ve turned the IT department into a money-maker.”

CRAIG COLLEY CCD

### MONETIZATION MATTERS

Monetizing on hybrid has not been as straightforward or relatively smooth a process as that enjoyed by CCD for most organizations contacted or looked at for this study. Most have struggled with finding a pathway, and many indicate they are far from figuring things out definitively.

“The business model,” points out Oscar Cerezales of MCI Group, “is all dependent on the chair you occupy, your conditions, your market, the options it offers and so forth. The perspective of the customer, the venue, the tech provider and the PCO on hybrid can be quite different.” He points out that “a tech firm for instance can simply focus on selling hardware, software, maintenance and training, or extend into the licensing game, programming or add advisory services. It’s a palette, but not too complex: selling things or selling hours. Compare that with a venue deciding on a ‘go it alone’ strategy to build its own platform, adding in effect



**BRIAN NASH** ICC Sydney

**“Ensuring profitability of a hybrid event is important, but our main priority is that the customer is seen, heard and accommodated first and foremost as we are working towards a benefit that will last.”**

a TV or movie-making operation, restructuring its event execution DNA, dealing with remote attendee complaints from Chile to China, and coming to grips with serious data analytics. And all this amid a global pandemic. So the permutations and thinking required for a hybrid business can get tricky fast. No wonder this whole hybrid transition process is taking so much time.”

Cerezales’ MCI Group colleague in the Middle East, Ajay Bhojwani: “We see as a result that hybrid is not about one business model, but many, and that among PCO’s here in the Middle East and elsewhere the talk is very much about needing a mix, about being flexible, fit-for-purpose, and adaptive. And that counts for the hybrid offering as much as the business model behind it. No one size fits all, and different countries may require different, or multiple models.”

“That everyone has to collaborate and needs to demonstrate flexibility in working towards an effective business model, I think that is highly positive,” observes Brian Nash of ICC Sydney. “Ensuring profitability of a hybrid event is important, but our main priority is that the customer is seen, heard and accommodated first and foremost as we are working towards a benefit that will last. And we’ve found that hybrid can offer some unexpected bonuses in contributing to a business model, like our ability to help clients achieve their Corporate Social Responsibility (CSR) objectives.”

What is helpful is that the metrics to underpin business model choices are becoming clearer, if far from fully evolved. Hexafair, for instance, noted in its June 2021 blog *6 Top KPIs to Measure Your Hybrid Events Platform Success* that up through Q2 2021, some 70% of event sponsors were already incorporating hybrid event strategies in their business budget planning.

**THE MAIN KPI’S MENTIONED**

- GoalClick-through Rate
- Absence (or Attrition) Rate
- Audience Retention Rate
- Sponsor Engagement
- Attendees Satisfaction Rate
- Lead Conversion Rate

For all the challenges around choosing, adopting and testing business models around hybrid and making money, a preponderance of those who contributed to this study conveyed the points that:

- There are a variety of ways you can make money on hybrid;
- There will highly likely be more ways to make money on it soon;
- A significant number venues and PCOs and tech companies have been profitable nearly from the very start of their hybrid journey, or have at least not lost any money on it;
- Customers are working out business models for themselves or, more commonly, with outside expertise or PCO support;
- There is more data collection, research and definition required to establish clearer KPI, ROI, and earning model insights (“a detailed financially-centered survey of every venue and every sizeable PCO in the hybrid universe covering 2020-2021 would be marvelous”); and
- It also costs money to do hybrid, but it all depends on who does what spending under which expense ledger (i.e. smart partnering with parties who already have a mature tech infrastructure, studio or platform or who enjoy government subsidies limits investment costs).

One key area where there still appears to be quite some contention: data ownership. While many hybrid stakeholders are quite clear and adamant it belongs to the customer, there is also discussion about what the rise in value of data related to or generated by hybrid events might result in, and its possible impact on business or earning models. Much of this, in turn, centers on the possibility that big tech company platform providers or data analytics giants might possibly gain an unduly large, privileged position. Less politely: gain a choke-hold data curator position.

**EMERGING BUSINESS MODELS**

There is no set nomenclature for all the different business models being thought out, tried, tested and used for hybrid events. A few of the following hence derive their title from their users, those pondering their use, or their key feature(s).

A round-up of 9 primary emerging business models:

### 1 | THE ONE STOP SHOP OR SWISS KNIFE MODEL

Used by both venues, PCOs and tech companies, this basic open model stresses “partnership arrangements and customer unburdening,” comments Michiel Middendorf of the GL events World Forum The Hague. “We offer the client the options troika of either a live, online (streaming) or hybrid event, each having separate plans with standard pricing, so hybrid is a clearly delineated service with a menu of different service level options. Using our studio and dedicated tech partner Squares, we can go any which way to fill in the hybrid piece. If the customer wants it we can arrange it all, up through a multi-national Hub-and-Spoke broadcast with online voting and simultaneous translations, and down to just being a host and facilitating a client who wants to bring their own platform and design, tech and director team. Even if an organizer spends as much on their hybrid event as on an all-live event, their cost per delegate will come down dramatically as the number of participants increase without limitations.” This ‘customer convenience’ model usually offers a standard range of interactive functionalities for customers to choose from, as well as end-to-end coverage and so-called ‘follow-the-sun’ time-zone management planning.

Various PCOs and tech companies have the same offering, with in essence them being the customer-facing ‘lead partner’ of or for the venue. Cisco, for instance, known for its partnering model in the tech world, is now partnering with a growing number of congress and convention centres to bring its hybrid proposition to a wider market.



A view from the cockpit: the director’s team orchestrating a hybrid meeting from the GL events World Forum The Hague studio.

The model, also flippantly labelled the Tutti Frutti Model by one observer, requires a full-fledged hybrid capability built around a collaborative partnership, and versions of it appear to dominate the current hybrid events industry. This is effectively disguised by the fact that venues as well as PCOs as well as tech companies, while working closely together, often present this as an offering under their particular label (or studio or platform name).

#### WHERE IS THE MONEY RIGHT NOW?

- Sponsor advertising
- Program design
- Renting out of studio / space
- Renting out of equipment
- Renting out of tech staff
- Content re-sale / re-packaging
- Selling bandwidth
- Providing advice

### 2 | THE FLEXIBLE MODEL

Centered on PCOs, the Flexible Model allows for optimal personalization and flexibility for different events on a mix-and-match basis. MCI Group is a leader in the field, emphasizing its ability to pick and choose from some 15 different building blocks depending on the client, country, and event objectives. “The aim with hybrid events is to activate the audience,” outlines Oscar Cerezales, “and per event we try to find the optimal combination of experience and scale-ability. Face-to-face events are the most powerful, but their scale-ability is poor. Digital offers high scale-ability and a low replicability cost, but the experience is less. We hence have a flexible, ambidextrous business model that is client-centered on high engagement for the best ROI.” Adds MCI Group’s Middle East Director Ajay Bhojwani: “We work intensively with the client around the pricing strategy, so that our flexible approach can then serve to tailor-fit the event and its objectives. As a PCO we both do event organization and separately consulting, and we’ve found that flexibility in both areas to result in high client satisfaction rates as well as solid earnings. We’ve enjoyed a full profit almost from the start, and of all the variants we can deliver, our so-called 50/50 (sub) Model in which attendance is roughly 50 % on- and offline each is momentarily proving most popular.”

# “It is no longer about who attends your programmes or reads your content but about who engages”

SEBASTIEN TONDEUR CEO, MCI Group

## 3 | THE FACILITATOR MODEL

The CCD in Ireland promotes itself as a facilitator of hybrid events, relying on its strong IT infrastructure and capable staff – from camera people to its design team – to enable customers to run the hybrid platform and program of its choice. It does not maintain an own platform or studio, but can arrange for them to be used or set up virtually anywhere in the Dublin venue. “Our tech investments specifically for hybrid have not had to be huge, as we already had a lot of the equipment and infrastructure in place,” says CCD’s Craig Colley. “But we are fully plug-and-play capable to meet client needs. With all the tech companies here, and they amount to about 50% of our clientele, it is a successful formula so far, and one that allows customers to fully realize their own hybrid event ROI.”

The model is venue-oriented and requires only a modest investment, provided a facility’s IT infrastructure is up-to-date. But as it means a venue’s ability to deliver hybrid events itself is marginal at best, this in turns means heavy dependence on a marketplace with mature hybrid operators or customers to ‘bring the business.’ By default, since it requires the least effort for a venue to serve as a Facilitator, this currently appears to be the single largest basic earning model among venues, with a growing number using the One Stop Shop or Swiss Knife model in addition (as an extending overlay).

## 4 | THE DOMINANT DIFFERENTIATOR MODEL

“We combine end-to-end service with an ability to handle the most complex of events,” states Swapcard CEO Baptiste Boulard. “Complexity is our big differentiator, as not all that many parties can do this well, it requires substantial investment and expertise, and the need for this ability is quickly growing. As clients are getting increasingly digitally capable and more demanding, we’re in a perfect spot to bring them ever more advanced, ever more customer ROI-tailored services. We are also finding clients are increasingly self-improving as they get the full data on everything they are doing. With our help, they can for instance track whether a session is impactful or boring, whether their strategy to enable their workforce to follow learning sessions on their mobile phone is working or not, and just how much, often near-instantaneously. Hybrid delivers value where the customer is, and we’ve built the platform to make that happen. Complexity capability pays, and by the same token it opens the door on future possibilities. For instance, we’re now beta testing literally turning an event into a community, where people can choose to go to 1 of 10 events, but have full access to the information in the other 9, with a live newsfeed offering a connective overview.”

The domain of tech companies and to a lesser extent PCOs, this model is high investment and high pay-off, requiring a major, focused effort and operation. Various market watchers see it as one of the business models most likely to succeed at scale because of the returns for the client, its outsourcing advantages, its technological reach and the closeness and scale of customer-provider partnering.

## 5 | THE SUBSCRIPTION MODEL

“At Events DC we are now all-in towards a hybrid events future,” states President and CEO Gregory O’Dell, “and with our new permanent studio and Gather platform we eventually hope to end up as the Netflix of the events industry.” It is a longer-term strategy founded on new audience discovery (via hybrid), building content, drawing repeat customers close and working towards a subscription model with major sponsorship opportunities, all the while floating on and building out an initially straightforward hybrid events model. “We are now in the investment phase but hope to soon start capitalizing on our strong mixed events portfolio including sports, entertainment and culinary events,” explains O’Dell. “We see great interest in building and bringing compelling content that can be brought online before, during and after live events through multiple touchpoints. With a loyal, strong and varied customer base, a good part of it local here from the Washington DC region, we have high hopes our business model will prove a winner, an example to follow.”



GREGORY O'DELL AIPC, Events DC

*“With our new permanent studio and Gather platform we eventually hope to end up as the Netflix of the events industry.”*

## 6 | THE TRUSTED ADVISOR MODEL

Applied by both PCOs and venues, the Trusted Advisor Model can be viewed as a stand-alone or an ancillary business model. Either way, it strengthens bonds with customers to mutual benefit, the effort centered on assisting customers finding a pathway towards a hybrid event, or hybrid in general. While some observers expect the model to “run out of steam” over the long run as more and more clients become used to and capable in the hybrid events space, they also note this may take some time, and that a lower paid consulting role (even for a venue) can be high-yield in the end. Brian Nash of ICC Sydney notes that “we offer a hybrid event solution to help event organizers meet their objectives for their stakeholders, attendees or members. This service helps them to continue to have meetings when health and safety conditions require it and until a 100% face-to-face experience is suitable.” Offering advice allowing clients to ‘over-bridge’ the vagaries of Covid’s effects, and offer them insights on future applications of hybrid so far appears primarily the domain of PCOs. Various venues reports success as well, from guidance on hybrid program cost-cutting like lessening the number of – relatively expensive – outbreak sessions to saving on costly speakers by ‘bringing them in’ online, versus paying higher speaking fees, plus the costs of travel and other expenses.

## 7 | ANCILLARY MODEL: DESTINATION MARKETING

“I’m uncertain if you can call this a business model in and of itself, but it certainly is an add-on,” observes Michiel Middendorf of GL events World Forum The Hague. He is referring to the newly expanded ability of destinations to promote themselves

in the online world, and through hybrid events in particular. “The city or region or country is being provided a new platform here, and some like the city government here in The Hague are seizing it as an opportunity to sell their city through hybrid events – for business as well as tourism. They can give it optimal spin, refer to things like upcoming events, and use the latest and greatest marketing materials. A plus for our customer-supporting program makers is that

you can often get top-tier speakers like a mayor or famous city resident for free, it helps lend some free variety to the program, and you can open up a whole new world for the viewer, enticing them to come visit. Imagine, suddenly being able to market to prospective travelers from whole new parts of the world you never previously focused on, at very low cost. For many in destination marketing, an exciting proposition.”



© COPYRIGHTED IMAGE

“Ultimately, the purpose of destination marketing is to make your location or destination seem more attractive than the main alternatives.”

REVFINE Optimizing Revenue

## 8 | ANCILLARY MODEL: SUSTAINABILITY

“We emphasize sustainability in all we do here in Switzerland,” notes Swisstech CEO Julianne Jammers, “and while a selling point for hybrid, it is not yet a business model, but there is potency there. Globally, people’s consciousness is definitely on the rise, and organizers’ ability to strive for a low carbon event footprint, with perhaps a few less people at the physical meeting but in return substantially more present online, it’s attractive.” She observes that as CSR and Environmental, Social and Governance (ESG) considerations become an ever more important aspect of both corporate and government event-related decision-making, the future may well see a separate related business model emerge.

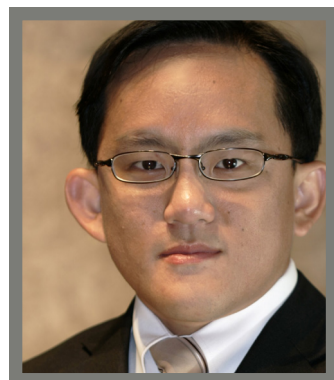
## 9 | ANCILLARY MODEL: FUTURE LIVE EVENT BOOSTER

From the CCD in Dublin to PCO leaders, numerous study respondents point out that many people who have a positive remote attendance event experience, especially if they are new to the event, are more likely to want to attend that event live in-person in the future. “That dynamic is strong here in the United States,” says Events DC President and CEO and AIPC President Gregory O’Dell, “and many of my overseas colleagues in AIPC are seeing the same in their country: a good remote experience often prompts people to want to attend in person the next time.” To what extent this is an effect that can be poured into a separate business model, or proves to be simply a positive add-on result of hybrid events, is not clear. When figures on this effect do become less opaque, the possibility would appear present.



# 6. FUTURE LANDSCAPE

## What might the future hold for the hybrid events industry, and where do participants see the opportunities?



**WEE MIN ONG** Marina Bay Sands

### REIMAGINING THE FUTURE

“We found out hybrid is the future even before Covid,” notes Singapore’s Marina Bay Sands Vice President of Conventions & Exhibitions Wee Min Ong with a smile, “but it was Covid that forced us into the future, forcing what we were mapping out as a three-year process into a three-month rapid turnaround project.”

The genesis of the Marina Bay Sands’ discovery that ‘hybrid is the future’ lay in its November 2019 decision to form a small ‘Re-Imagine Team’ to do a deep think on where things might be headed in the years to come. “With pre-Covid 3,600 events a year with 1.4 million delegates in attendance, we were the world’s most profitable combined convention centre – hotel and ancillary services complex at that time,” states Ong, “and it’s in our DNA to stay ahead of the market and let innovation drive our performance.”

The Re-Imagine Team ended up finding its inspiration for the future in three industries:

- 1 | US weather channel broadcasting, and especially storm and disaster coverage featuring in-studio overviews and graphics combined with a lot of ‘man on the ground’ reporting.
- 2 | The E-Gaming industry and its extensive ingrained use of Computer Graphics (CG) to enhance virtual reality, bring things to life and strive for ‘wow-ing’ an audience using expert story-boarding.
- 3 | The British premier League and other top football leagues and their expertise in running parallel broadcasts and brand strengthening, online and offline, from games and stats and their monetization reach all the way down to merchandising.

While looking ahead, the team stuck to the industry’s most fundamental tenets to ensure what it might be developing was and would remain squarely built on the Why? of events: the transfer of knowledge, the stimulation of commerce, and the building of networks.



The ‘Why?’ of the Marina Bay Sands’ Re-Imagine Team

“What evolved from all this thinking was the August 2020 launch of our Hybrid Broadcast Studio,” says Ong, “which emphasizes ‘pure live technology’ – no latency or signal delays even beaming in people from many time zones away – and a fundamental desire to ‘wow’ audiences. Examples of that include our hologram presenter capability and our use of immersive screens. And I must say, with over 600 successful events on this basis since its launch, the concept has proven validated. Perhaps we did not build the future, but we’ve certainly built a present with a future that works for us and for our clients, and a success formula with an earning model match.”



The ‘other industry’ pillars of the Marina Bay Sands Hybrid Broadcast Studio concept: Weather Channel Reporting, E-Gaming and leading football league broadcasting and brand-building.

“So now we are in the hybrid age, but what does the future of the industry really hold for all of us? We firmly believe that the future of the industry is omni-channel in nature: well-planned face-to-face meetings working in tandem with a well-strategized online strategy where content, networks and engagement exists in a 24/7/365 O2O2O (Online to Online to Online) model. It’s truly exciting because the possibilities and opportunities for the industry are only constrained by the limitations of our imagination and our courage to push the envelope to ‘wow’ our audiences.”



The Marina Bay Sands Hybrid Broadcast Studio

Why is it worth mentioning Singapore’s success when thinking about the future?” asks AIPC CEO Sven Bossu. “Because it encompasses so many key components that appear to underpin a successful foray into the hybrid space for the industry at large.” Among those components that Bossu and other observers see as likely success factors towards the future beyond the ‘general onboarding requirements’ outlined earlier:

- A willingness to do a deep rethink about the nature of events, their make-up and their business models;
- A dipping into the experience of other industries, either their hybrid make-up or the potential they hold for hybrid events applications;
- A willingness to embrace what technology offers in terms of enhanced audience engagement; and
- A vision that moves beyond the old paradigm of Content is King in favor of one that emphasizes the Extension of Value and Capturing of Imagination as well.

## OPPORTUNITY BOX

Where do various stakeholders see some of the biggest potential opportunities for hybrid events in the coming years? The *Hybrid Event Value Proposition* list on page 9 gives the grand overview, but a few industry observers note that looking at specific revenue generator areas might mean overlooking larger value gains. This relates to venues and PCO’s possibly missing out on some advantages that cannot be neatly fit into a particular money-making opportunity yet, even though they herald significant benefit just by virtue of the fact that one is partaking in hybrid events.

Three big potential advantages that industry experts see based on ‘DOMO over FOMO’ (Danger Of Missing Out versus Fear Of Missing Out) are:

1 | The fact that hybrid events ‘make the pie bigger.’ Swisstech’s Julianne Jammers is leery of over-promoting hybrid, but believes it will find and get its proper place in the industry in due course. “But ask me where I see value now, and that’s that hybrid technology and programs clearly have the ability to enlarge the value customers can derive from events by using hybrid. Hybrid enables reach, but it also enables economic leverage, like drawing in audience members such as students who could never afford to go to a far-off, expensive scientific congress. For us it means hybrid expands the pie, foremost for the user.”

2 | The flywheel effect of hybrid in helping organizations fully digitize. “Engaging in hybrid forces you to not only to think through your IT enablement infrastructure, but all things design, organization, and process,” sees Craig Colley of The Convention Centre Dublin. “As a transition driver, it holds significant power to propel your organization forward, at several levels at once.”



CCD hybrid broadcast live from Dublin, 2021



**JOHAN DE WIT** Siemens

3 | The prospect of hybrid becoming a linking pin for future technological seamlessness. Far short of an eventual *Metaverse* and similar virtuality-based future-scripts, many tech and events industry article writers see more practical prospects for ‘hybrid service extensions’ in the years ahead. These include the ability of vendors and providers to link what are now for various reasons (including privacy concerns) often more or less loose ends on the data analytics side more directly with marketing platforms and CRM systems such as Salesforce, Sympa, Eloqua and Mepco into a far more integrated, seamless whole. While this is already happening to some extent, observers like Gerd de Bruycker of Cisco see it vastly accelerating, to the benefit of the customers. “Hybrid platforms are getting bigger, and will become bigger still, facilitating a host of extra functions and ROI models in the future. The biggest connection to come will be hybrid events as a full-fledged facilitator of hybrid work.”

Among the more specific areas where industry participants expect hybrid to deliver the biggest future ‘pop’ and make the largest contribution:

“ Ultimately, it’s about transferring content, cognition and connections.”

**JOHAN DE WIT** Siemens

### EDUCATION

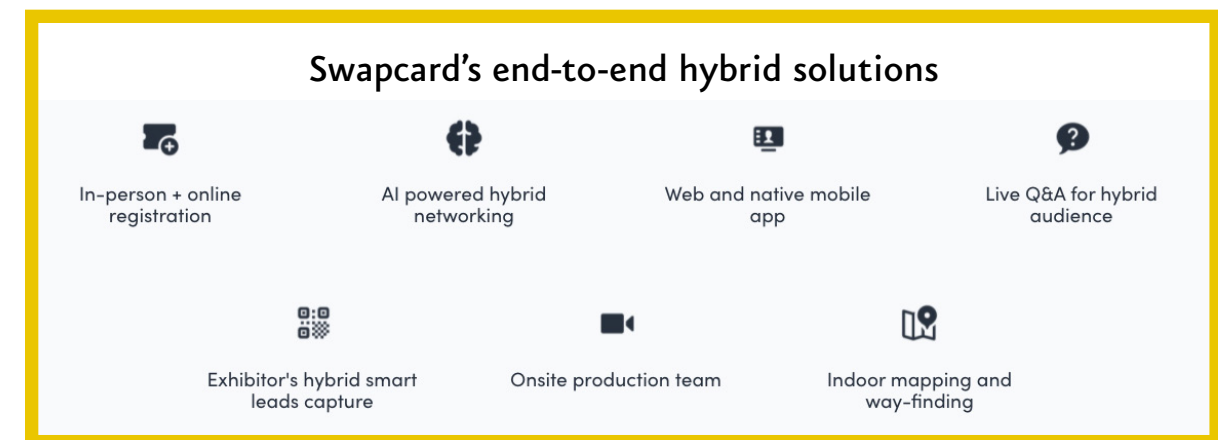
Johan de Wit, Technical Officer Enterprise Security of Siemens Smart Infrastructure, notes that “the white-collar working world faces a huge skills gap over the next five years, with a vast need for re- and e-skilling somewhere over 90 million people. As a global engineering leader, we at Siemens too are transitioning from ‘the screwdriver to the keyboard,’ ensuring we give our clients optimal support in this increasingly data-driven environment. So that means we are investing heavily in education. Ultimately, it’s about transferring content, cognition and connections.” What various decision-makers in large multinationals like Siemens are stressing is that the education and training potential of hybrid events to help deliver what is needed, similar to the association realm, is vast. “All the way through to the creation of on-demand content libraries,” sees de Wit.

### REACH (BEYOND GEOGRAPHY)

Siddhesh Palsule of Grand View Research states that “looking at the future, we see hybrid events and technology become a more inclusive, extended universe, where next to the unlimited geographic reach of events, things like virtual reality, augmented reality, machine learning and artificial intelligence will become increasingly useful, commonplace, and able to give customers a more valuable and immersive experience. Hybrid events will increasingly be able to extend client participation in the virtual domain, with many more functionalities at their disposal than ever before.” A few observers even surmise this might give hybrid events the opportunity to reach or even surpass engagement earning levels of such sectors as Gaming.

### DATA ANALYTICS

The World Economic Forum Future of Jobs Report 2020, which covers the period in which Covid-19 became a full-blown pandemic, states that of the “technologies most likely to be adopted by 2025” on a worldwide scale, “Big Data Analytics comes in a close second to Cloud Computing.” Baptiste Boulard of Swapcard sees data analytics as the big hybrid client enabler, with the ability to track, act and monetize “on remote attendee activities being far better than in-person event attendees, as the measurements are far more refined.” Gerd de Bruycker of Cisco reinforces the point, noting that “analytics is at the epicenter of hybrid event ROI, and full-spectrum platform providers like us are as a result likely to become much closer, more important partners for the long term.”



A Swapcard website infographic on hybrid solution offerings

### SAVINGS AND RE-USE

SwissTech Managing Director Julianne Jammers sees “there is a silver lining for events and associations in particular in terms of growing the size of events through the development of hybrid. Referring to the ability of remote event attendees to benefit from involvement in far-away live gatherings. For example, “a student to attend world class conferences that until recently were out of reach for both financial and time reasons, well, that’s an economic paradigm shift. At least to that student, that association, that event and that sponsor. Combine that with the advantages of content capture and re-use, and much like the Massive Online Open Course or MOOCs initiative started six years ago at the EPFL, it seems to me the events industry thanks to hybrid now has a vastly improved means of delivering economic value over great distance. Monetizing this model for venues is a key next step to ensure that venues also benefit from the gain in audience that organizers will see. And one that we believe is entirely possible as the technology to replace the ‘seats’ is not for free.”

### ECO-SYSTEM CREATION

MCI Group’s Oscar Cerezales sees the corporate sector as having led the way in the creation of hybrid-driven eco-systems in recent years, to include retail, sports and gaming. “Take retail as an example,” he discerns, “look at what the hybrid pioneers have achieved in that space. It used to be we all bought our clothes in person in brick-and-mortar stores. Think live events. Now we often shop for clothes online, compare and contrast, do everything but fit them on. And when they don’t fit, we return them. So there is a whole new earning model that has vastly expanded several markets all the way to cardboard production and shipping/logistics. That’s the kind of live–online synergy we need to develop in the events industry: expand our thinking, identify the opportunities, and then go pursue them.’

## QUO VADIS?

# “ A sampling of authoritative voices looking ahead on hybrid:

*“I expect it to take up to three years before the hybrid events market will settle, and new business models to find their rhythm and full acceptance.”*

**Ori Lahav | Kenes Group**

*“The stop-start Covid interference with our market will likely last another 6 to 9 months, and I expect by the close of 2022 we’ll approach a more stable live event re-start period, which will help us calibrate our future hybrid offerings.”*

**Martha Gomez | VIGIPARIS**

*“We at Lumi live hybrid, we’re undergoing are greatest, fastest expansion and growth ever, and we think that at this stage, ‘fear of virtual’ has dissipated, and that hybrid’s future is really bright. So much so that we are about to do a bit more consolidating than expanding, just to doubly ensure we’re serving our client base as absolutely best we can.”*

**Frank Schoonhoven | Lumi**

*“Our Board has agreed that we will view 2022-2024 as ‘experimentation’ or ‘playground’ years to optimize our new onsite and online business model for serving our associations. Studying hybrid’s potential will be a healthy part of that.”*

**Isabel Bardinet | European Society of Cardiology**

*“I foresee that the next six months will continue to see an open-close dynamic heavily effecting live events, with people still not comfortable with mass travel over long distances. After 12 months or so, I think we’ll see a more solid return to in-person events, with hybrid already having become a mainstay by then.”*

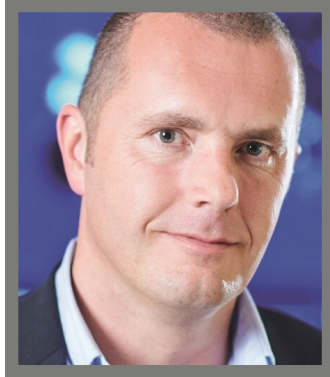
**Ajay Bhojwani | MCI Group Middle East**

*“The virus initially pushed us from 100% live to 100% online attendance, and right now we’re around 30% live and 70% online. I think hybrid will find its place and settle at somewhere around 75% live and 25% online soon after things stabilize.”*

**Wee Min Ong | Mandalay Bay Sands**

*“Hybrid is going to bring huge change to the industry, with PCO’s in the forefront of hybrid adoption, delivery and penetration and taking up a more strategic position. Hybrid in its simplest form is a new platform to expand the base, and by extension the industry’s ROI. I will not be surprised to soon in this evolution see customers and communities served right down to where they want it. Think about the artificial intelligence Spotify and Netflix apply. How about a year from now our industry enabling similar consumer-driver progress to that level?”*

**Martin Boyle | IAPCO**



**SVEN BOSSU** AIPC

*“Whatever the future holds, organizations should be certain they are able to exploit the opportunities.”*

### HYBRID AS FUTURE-PROOFING?

“Whatever the future holds,” advises AIPC CEO Sven Bossu, “organizations should be certain they are able to exploit the opportunities. In speaking with membership over the past several months, it’s struck me how those venues and PCO’s going down the hybrid path have consistently applied three main principles and the tenets of the GROW ME model.” Those principles are:

- 1 | Set and maintain an internally aligned position on the meaning and positioning of hybrid (offering internal and external clarity);
- 2 | Articulate a clear hybrid value proposition addressing and outlining the ‘gains and pains’ (for the own organization as well as partners, clients, and other stakeholders); and
- 3 | Define the impact and consequences of the value proposition on and for your organization (to help guide the transition required).

#### THE GROW ME MODEL

- Goal | What do you want to achieve with hybrid?
- Reality | Where do you stand now on hybrid?
- Opportunities | What options do you have to use/apply/enable?
- Will | Which option are you willing to pursue to the fullest extent?
- Measure | How will you measure performance and progress?
- Effectiveness | What is your target?

“I cannot say of course that thinking your way through such principles and questions will help fix your course on hybrid let alone contribute to organizational future-proofing,” stresses Bossu, “but I have found it remarkable that those industry leaders considering hybrid to be the future, and fully investing in it, are applying just this kind of guidance.”

Swapcard’s Baptiste Boulard is more adamant the events industry needs to change, and should change, soon and profoundly so. “Embracing hybrid is not just moving with the times and ensuring you and your clients are both making optimal returns on your investments, in all respects. Done well, engaging in hybrid is also laying the foundation for future-proofing your organization. For hybrid is the future, and this is not the kind of train you want to catch at the very last moment, struggling to make it onto that very last wagon.”

**“Hybrid is the future. Full-stop. I cannot emphasize it enough. The events industry needs to wake up and adapt. Now.”**

**BAPTISTE BOULARD** Swapcard

# HYBRID EVENTS

Just How Profound a Pivot?

## CONTRIBUTING ORGANIZATIONS

AIPC and IAPCO are grateful to all organizations that contributed to this study.



CONTENT MANAGEMENT Glenn Schoen | Boardroom@Crisis BV

GRAPHIC DESIGN Sharon Belanger | Belanger Design Studio