

CONGRESS
INTELLIGENCE
UNIT



2026 Outlook

RETHINKING THE RULES AND SEIZING THE NEW OPPORTUNITIES

Trends, Strategies, and Insights to Navigate the New Era of
International Conferences

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*“Conferences are no longer events — they are ecosystems.
Those who grasp this shift early will shape the future.”*

Giancarlo Leporatti

Foreword

The year 2026 opens with a new paradigm that is no longer emerging — it has taken root. Destinations, venues, and industry players are being called to rethink the rules of the game and adapt swiftly to shifting dynamics.

This is not a post-Covid rebound. It is the start of a new cycle. After two years of deferred events being rescheduled, international demand is settling into a more structural — and more selective — rhythm.

Technology, sustainability, the quality of the participant experience, and the strategic role of destinations are redefining the priorities of both organisers and hosts. In this new landscape, conferences are no longer just vehicles for scientific or professional exchange. They are powerful catalysts of reputation, investment, and competitive positioning for territories that know how to leverage them.

More than any previous year, **2026 will reward adaptability and strategic vision**, favouring those who can read the deeper shifts and transform them into long-term opportunity.

The findings gathered over the past months by the **Congress Intelligence Unit** confirm the predictions outlined in our white paper *Congress 4.0*:

- **Hybrid formats** did not replace in-person congresses — they elevated their value;
- **Venue selection** increasingly depends on the ability of a destination to convey a unique identity and to align effectively with organisers' needs;
- The congress supply chain is **reconfiguring** around new alliances between public and private sectors, between medicine and business, between innovation and narrative.

In the following chapters, we explore:

1. the most significant trends reshaping the European congress landscape;
2. the key drivers guiding demand and influencing decision-making in 2026;
3. the strategic opportunities for destinations, institutions, and operators ready to invest in the future. le tendenze più attuali e significative del mercato congressuale europeo;

1. New Global Dynamics and the End of the Rebound Effect

After the recovery-driven wave of postponed events in 2023–2024, the year 2025 marked the start of a more stable cycle in the international conference sector. The flow of events has taken on a more balanced rhythm, with greater geographical diversity – but also with a sharper focus on selectivity in decision-making.

Physical presence has once again become the preferred format, including in the scientific world. However, this return does not resemble the pre-2020 models. Attendance numbers are often smaller, but the participants are more qualified. The perceived value of a congress is increasingly tied to the **quality of the experience** and the **strategic function** of face-to-face meetings, rather than sheer volume.

Destinations that have successfully interpreted this shift – focusing on authenticity, accessibility, and a forward-looking vision – are now seeing the results. The new demand in the conference market is driven by more mature and conscious organisers who look for:

- strong coherence between location and conference theme;
- logistical and environmental sustainability;
- operational efficiency enabled by intelligent use of technology;
- the ability to provide a social, cultural and economic context that enhances engagement.

The Recomposition of the Value Chain

In parallel, the conference ecosystem is undergoing a **reconfiguration of key players**, with some professional roles becoming more central than ever:

- **PCOs (Professional Congress Organisers)** are reaffirming their pivotal role in managing international flows and ensuring coordination across borders;
- **Presidents and delegates of scientific societies** act as true influencers in the selection of host cities and venues;
- **Active Convention Bureaux** are evolving from passive promoters to strategic partners, supporting organisers throughout the entire value chain of the event.

Congresses as Strategic Tools

More and more often, conferences are no longer stand-alone events – they are **strategic tools** deliberately deployed by associations, academic networks, scientific institutions or EU bodies. Their purpose can range from:

- consolidating scientific leadership;
- promoting cooperation among territories, universities and research hubs;
- attracting talent and international investment;
- boosting institutional visibility and scientific diplomacy.

Venue selection is increasingly driven by these strategic goals. Destinations are chosen not only for their availability or popularity, but for their ability to represent a **clear positioning** – becoming co-protagonists, not just “event containers”.

2. The Return of Geopolitics in Conference Flows

In recent years, the geopolitical landscape has become a decisive factor in shaping international conference flows. This is not a temporary effect, but a long-term transformation that influences both demand and supply.

Travel limitations, tensions between global blocs, and economic and political instability in certain regions are redefining where events can be held and how easily participants can move. While some destinations suffer from uncertainty, others are emerging as “safe harbours” – politically stable, well-connected, and culturally open locations that guarantee predictability and accessibility.

The Shift Towards Safer and More Strategic Destinations

The new international context rewards destinations that combine:

- **a solid reputation** in scientific, institutional or business fields;
- **stable infrastructure and governance**;
- **strategic geographical positioning** within Europe or in proximity to major markets.

This shift favours not only traditional “powerhouses” but also **mid-sized cities** that offer a high level of livability and institutional collaboration. Especially in Europe, this change is **reshaping the competitive landscape**, opening new opportunities for destinations capable of projecting a clear identity and forming strong alliances with national and international organisers.

Visa Policies, Institutional Support, and Market Trust

The attractiveness of a destination now depends heavily on factors such as:

- **ease of visa procedures** for delegates from different regions;
- **support from public institutions** and national tourism organisations;
- the ability to **instil trust** in both organisers and participants – particularly in the medical, academic and scientific sectors, where credibility is paramount.

In this new reality, **the political, ethical and logistical dimensions** of a destination matter just as much as its infrastructure.

3. Value Over Volume: The New Paradigm

In the post-pandemic congress landscape, **quantity is no longer the primary indicator of success**. What matters most is the quality of participation, the strategic impact of the event, and the ability to generate long-term value for all stakeholders involved.

Smaller, Smarter, More Impactful

Conference formats are evolving:

- Events are often **smaller in size**, but **more targeted**.
- Participants are **more qualified**, and their presence is more intentional.
- Organisers increasingly focus on creating **meaningful content** and **immersive experiences** rather than on boosting attendance numbers.

This change is particularly evident in the scientific and medical fields, where **budget restrictions, time constraints**, and **ethical considerations** push organisers to justify every aspect of a congress. The question is no longer “how many are coming?”, but “**who is coming, why, and what will they take away?**”

Metrics That Matter

New KPIs are emerging:

- **Engagement rates** rather than just registration numbers
- **Knowledge transfer and collaboration outcomes** instead of applause and photo ops.
- **Legacy and territorial impact**, especially in research, education, and health innovation.

Destinations that wish to remain competitive must adapt their value proposition to this new framework, demonstrating not only logistical excellence but also a clear contribution to the mission and meaning of the event.

4. Hybrid is Here to Stay – But In-Person Leads the Way

After the digital acceleration triggered by the pandemic, the congress industry has reached a more mature phase of **hybrid integration**. However, the long-predicted “virtual takeover” never materialised.

The Real Value of Being There

What we’ve learned over the past three years is that:

- **Nothing replaces face-to-face interaction** when it comes to trust, engagement, and decision-making.
- The “**return on presence**” is higher than ever — especially for delegates who carefully select which events to attend.
- Onsite participation is now **more intentional and immersive**, often extended through **pre- and post-congress activities** that blend learning, networking, and experience.

In this new reality, **in-person remains the core format**, while **digital tools are used strategically** to enhance rather than replace the event.

Smart Use of Digital

Hybrid is not a 50/50 balance, but a **modular strategy** that adapts to goals and audiences:

- **Live streaming** and **on-demand content** increase accessibility and knowledge dissemination.
- **AI-driven platforms** support matchmaking, Q&A sessions, and data collection.
- **Virtual components** serve outreach and legacy purposes, especially for global networks and multilevel stakeholders.

Hybrid is most successful when it’s not a format, but a mindset — where technology amplifies human interaction rather than attempting to substitute it.

5. Congress Destinations as Strategic Players

In the post-pandemic landscape, destinations are no longer passive hosts — they are strategic partners in the design, positioning, and success of international congresses.

From Venue to Ecosystem

What defines a strong congress destination today is not just infrastructure or hotel capacity, but its ability to act **as a coherent and credible ecosystem** that supports the scientific or professional goals of the event.

Key factors include:

- **Alignment between local identity and congress content** (e.g., organising a climate congress in a city known for sustainability policies);
- **Presence of local champions** — universities, research institutes, hospitals, or industries with international relevance;
- **Access to funding**, both institutional and private;
- **Effective Convention Bureaux** that serve as facilitators, connectors, and co-designers;
- **Narrative power**: the ability to tell a compelling story around the event and its location.

From Bid to Co-creation

The congress bidding process is evolving:

- Successful bids are no longer based solely on cost or capacity, but on **value creation** and **legacy potential**.
- Organisers look for destinations that **invest in the event's success**, from political support to media visibility.
- Cities that position the congress within their **strategic development agenda** — be it science, innovation, health, or sustainability — tend to win.

This shift marks the **rise of congress diplomacy**, where hosting an event means attracting influence, talent, and recognition.

6. Organisers at the Centre: A New Generation of Decision-Makers

The dynamics of congress planning have changed, and so have the **protagonists**. While venues and destinations evolve, it is the **organisers themselves** — particularly **Professional Congress Organisers (PCOs)** and **association leaders** — who are redefining the rules of engagement.

The Central Role of PCOs

PCOs are no longer mere logistical providers. They have become:

- **Strategic advisors** in the destination selection process;
- **Gatekeepers** of the association's brand, scientific reputation, and financial health;
- **Interlocutors** capable of aligning multiple stakeholders — from sponsors and institutions to local suppliers and convention bureaux.

Their influence is growing, especially in the negotiation phase, where they balance **operational reliability, innovation potential, and cost-effectiveness**.

Presidents and Delegates as Influencers

In parallel, **association presidents and delegates** are taking on a more decisive role:

- They are often the initiators of the congress;
- Their personal or institutional networks influence location choices;
- They advocate for **mission-aligned events**, favouring destinations that support their field's growth or visibility.

In this context, they act as **opinion leaders**, often bypassing traditional procurement models and choosing partners based on **shared values and long-term impact** rather than cost alone.

A Changing Culture of Decision-Making

This new culture is characterised by:

- **Faster, more direct interactions** between organisers and destinations;
- A focus on **customisation**, with no one-size-fits-all solutions;
- A preference for **co-creation**, where organisers and hosts jointly design the congress.

To succeed, destinations and venues must **build trust**, offer flexibility, and engage with organisers **long before the RFP** is issued.

7. Technology and Innovation: Tools, Not Replacements

After the acceleration triggered by the pandemic, **digital technologies** have become a permanent feature of the congress landscape. But their role is shifting: rather than replacing in-person events, they are now seen as **tools that enhance** the live experience — when used wisely.

From Hybrid to Augmented

The initial wave of hybrid formats has largely stabilised. Organisers now prioritise:

- **Quality over duplication:** avoiding parallel experiences with diluted impact;
- **Integrated journeys**, where online elements prepare, accompany, or extend the in-person meeting;
- **Selective digitalisation**, applied where it brings real value (e.g. access, accessibility, continuity).

The goal is no longer to “broadcast the event” — it’s to **curate meaningful participation**, both onsite and online.

The Real Innovations Are Operational

More than virtual platforms or metaverses, the true game-changers in 2026 are:

- **AI-powered tools** for agenda design, matchmaking, and content personalisation;
- **Data integration** between registration systems, apps, and CRMs;
- **Onsite technologies** that improve logistics, from digital signage to smart badges;
- **Accessibility solutions** — including multilingual captioning and inclusive interfaces.

These innovations **don’t replace human interaction**. They **support it**, making the experience more efficient, inclusive, and adaptable.

Human-Centred by Design

The most advanced congresses today are **technology-enabled, not technology-driven**. The design starts with **people** — speakers, delegates, organisers — and builds around their:

- **Needs** (access, clarity, time);
- **Emotions** (inspiration, connection, engagement);
- **Actions** (interaction, feedback, learning).

The digital infrastructure must remain **invisible** unless it adds value. Otherwise, it risks creating friction and distraction.

8. Sustainability, Authenticity, and Impact

Sustainability is no longer a “trend” — it’s a **prerequisite**. But in 2026, it takes on broader meaning: not only **environmental**, but also **social, cultural**, and **economic**. A successful congress today must prove its **relevance, responsibility**, and **positive footprint** on multiple levels.

From Offsetting to Coherence

Offsetting emissions is no longer enough. Organisers and destinations are expected to:

- **Reduce travel-related impact** through smart agenda design and compact formats;
- **Choose venues and suppliers** committed to green practices;
- **Eliminate waste**, especially single-use materials;
- **Design experiences** that are **coherent** with the values of the congress content.

Authenticity and coherence matter: a congress about climate action held in a wasteful setting is no longer acceptable — nor credible.

Beyond the Carbon Footprint

The notion of **impact** expands:

- **Social inclusion**: ensuring access for underrepresented groups, and removing participation barriers;
- **Cultural relevance**: promoting local identity and know-how, not just generic hospitality;
- **Legacy value**: connecting the congress to the long-term development goals of the host community.

A well-designed congress leaves **something behind**: knowledge, connections, opportunities — not just receipts and room nights.

Destinations as Allies

To meet these expectations, destinations must:

- Be **authentic**: not just attractive, but aligned with the values of the event;
- Be **engaged**: not just hosting, but contributing to the meaning and content;
- Be **measured**: able to document and share their impact and added value.

The most attractive destinations in 2026 are not necessarily the most famous — but the most **credible, committed, and coherent**.

9. The Strategic Role of Destinations

In the new congress landscape, destinations are no longer just locations — they are **strategic players**.

Their role goes far beyond logistics or hospitality. In 2026, destinations that want to compete must know how to **position themselves** as active partners in the design, promotion, and legacy of events.

From Hosting to Co-Creating

The old model — where a destination merely “hosts” an event — is no longer sufficient. Organisers are looking for:

- Local knowledge and insight into the relevant sector;
- **Support in stakeholder engagement**, from institutions to academia to industry;
- **Content alignment**, with proposals and narratives that enhance the congress theme;
- **Long-term collaboration**, not just a one-off hosting experience.

Successful destinations act as **co-creators** of the event experience — not just service providers.

Visibility and Reputation

Conferences are increasingly part of a **reputation-building strategy** for cities and regions. They:

- Position the destination on global scientific and innovation maps;
- Attract talent, startups, and investments;
- Foster **institutional credibility** through engagement with the academic and medical world;
- Create **economic spillovers** beyond the tourism sector.

This means that destination marketing must become **destination intelligence** — capable of targeting specific congress sectors with data, vision, and consistency.

A Collaborative Ecosystem

No destination can act alone. Success depends on the ability to build a **local ecosystem** involving:

- **Public institutions** (health, education, innovation, tourism);
- Scientific communities;
- Professional organisers and convention centres;
- **Businesses and sponsors** aligned with the sector of the event.

The most advanced destinations are those that invest in this ecosystem — and know how to **mobilise it** in a strategic, credible, and measurable way.

10. New Alliances and Governance Models

To succeed in the current landscape, congress planning can no longer rely on fragmented approaches. The most promising developments are emerging from **new alliances** and **shared governance models** that bring together different sectors and stakeholders.

Public–Private Synergy

The collaboration between public authorities and private operators is becoming **essential**. It is no longer just a matter of funding or sponsorship — what’s at stake is the **ability to co-design strategies**, build shared goals, and invest in long-term outcomes.

Forward-thinking institutions are those that:

- View conferences as part of their **economic development** and **research policy**;
- Recognise the **reputation impact** of hosting international events;
- Are willing to **facilitate dialogue** between organisers and local players.

Scientific Societies as Strategic Actors

Presidents and boards of scientific societies are no longer passive decision-makers. They are increasingly aware of:

- The **strategic relevance** of choosing the right destination;
- The opportunity to **leverage congresses** to create new partnerships;
- The role of events in reinforcing the **international positioning** of their society.

As such, their engagement in early planning and destination selection is deeper, more informed, and more demanding than in the past.

Beyond Logistics: Governance for Impact

The rise of complex international events calls for new governance models that:

- Integrate **city diplomacy**, scientific priorities, and innovation agendas;
- Establish **steering committees** that go beyond the organising committee;
- Involve a wide range of stakeholders in a **co-responsible framework**;
- Measure success in terms of legacy, visibility, and long-term collaboration.

These models are not about control — they are about coordination, shared leadership, and the ability to adapt to rapid change.

11. Technology, AI, and New Formats

Technology is no longer just a support tool — it is a **structural component** of the conference ecosystem. From participant experience to programme design and operational management, **digital solutions, AI applications, and innovative formats** are transforming every phase of congress planning.

Artificial Intelligence: From Theory to Practice

While AI is still viewed with caution in some circles, its concrete applications in the conference sector are multiplying. The most impactful developments include:

- **Multilingual real-time translation** using voice recognition and synthesis;
- **Smart agenda builders** that create personalised schedules based on interests, availability, and goals;
- **Content mapping and clustering**, helping organisers and delegates to navigate complex scientific programmes;
- **AI-assisted networking**, matching participants based on compatibility, intent, or strategic interests.

These tools are not replacing human interaction — they are **enhancing it** and allowing **more effective and inclusive participation**.

Hybrid is Evolving — But Not Replacing

The “hybrid revolution” has settled into a **complementary model**. While virtual components are still relevant, especially for educational content or outreach, **in-person attendance** remains the most valued format for high-level congresses.

The innovation lies in how technology:

- Expands accessibility and engagement;
- Improves data analytics and audience insight;
- Supports **real-time interaction** across physical and digital platforms.

New Formats: From Passive to Participatory

Conferences are moving away from the traditional “speaker–audience” dichotomy. The most successful events today adopt:

- **Modular formats** combining plenaries, think tanks, and hands-on labs;
- **Immersive experiences** powered by AR/VR and interactive installations;
- **Narrative design** strategies that structure content like a story, with tension, resolution, and call to action.

The common denominator is **participation**: attendees are no longer spectators, but co-creators of value.

12. Beyond Congresses – Knowledge, Diplomacy, and Reputation

In today's interconnected world, a congress is never just a congress. It has become a **strategic lever** that extends far beyond its immediate agenda. Scientific meetings and professional summits increasingly serve as platforms for:

- **Strengthening reputational capital** for host destinations and institutions;
- **Positioning organisations** as thought leaders within their field;
- **Facilitating cross-border cooperation** in research, innovation, and policy;
- **Enhancing scientific diplomacy** by attracting global experts and building strategic networks.

From Event to Strategic Action

This transformation reflects a broader trend: the **intentional use** of congresses to shape narratives, influence policy, and assert global leadership. Many scientific societies and institutional actors now view conferences as:

- A **signal of excellence** and competitiveness;
- A way to attract talent, funding, and visibility;
- An opportunity to **build or reinforce alliances** — between disciplines, sectors, or nations.

In this context, destinations are no longer just venues — they are **strategic partners** whose values, vision, and positioning matter.

The Role of the Host Destination

The choice of where to hold a conference increasingly reflects **symbolic alignment** as much as logistical convenience. Cities that:

- Support research and innovation;
- Promote sustainable development and internationalisation;
- Offer a coherent **identity and narrative** aligned with the conference theme;
- are more likely to be selected.

These places become **active co-authors** of the congress outcome — amplifying its message, reinforcing its impact, and anchoring it in the broader social, scientific, or political context.

13. Strategic Outlook 2026

The 2026 outlook for the international congress sector presents a mix of **stabilisation, transformation, and polarisation**.

After the intense recovery period of 2023–2024, and the more selective reshaping of 2025, the year ahead is expected to further consolidate new dynamics. Several key trends stand out.

Stabilisation of Demand – With New Priorities

The number of congresses is expected to remain stable or grow moderately. However, **criteria for destination and venue selection will continue to evolve**:

- **Hybrid formats** will persist, but in-person participation will dominate when the experience and networking are key drivers.
- **Smaller, more focused meetings** will coexist with large congresses, often with clearer strategic goals.
- **Decision-making will shift** increasingly towards boards and scientific committees, rather than logistical or marketing departments.

Market Polarisation – Fewer Winners, Higher Stakes

We are likely to see a **widening gap** between destinations that actively invest in congress strategies and those that remain passive:

- **Top-performing cities** will consolidate their leadership through innovation, strong public-private alliances, and destination storytelling.
- **Mid-sized cities** with a clear identity and responsive infrastructure may gain ground, especially if they align with niche scientific domains.
- **Passive destinations**, offering only facilities without vision or support, may struggle to maintain competitiveness.

The Value of Vision and Reputation

In 2026, success will not depend only on infrastructure, but on **strategic positioning**:

- Destinations and organisations that can **interpret global trends** and adapt to new expectations will emerge stronger.
- Congresses will be increasingly integrated into **broader reputation-building strategies**, often involving institutions, academia, and the business sector.
- The ability to **narrate purpose** — not just promote availability — will make the difference.

14. Final Remarks

Conferences are no longer simple gatherings of professionals around a theme. They are becoming **strategic platforms** — where science, policy, territory, and reputation intersect.

This shift calls for **a new level of awareness** from all stakeholders: from destinations and venues to organisers, scientific societies, and public institutions.

What emerges is not just a new season for international meetings, but a **new ecosystem**, where:

- **Scientific impact** is amplified by physical presence and shared experience.
- **Destinations compete** not only on logistics, but on vision, identity, and alliances.
- **Congress culture** becomes part of broader strategies for positioning, influence, and soft power.

In this evolving context, 2026 will test the ability of stakeholders to **understand, adapt, and anticipate**. But for those who are ready, it also offers **unprecedented opportunities** — to grow, to lead, and to shape the future.

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