

Global Socio-Political Impact Survey



MAY 2025



Executive Summary



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Global unrest, policy changes, conflicts and wars impact all aspects of society, including the international meetings and conference industry.

The International Association of Professional Congress Organisers (IAPCO) together with its network of National PCO Associations and global strategic partners, set out to measure the impact of recent global unrest and major policy change over the last two years. **The Global Socio-Political Impact Survey of 2025** is a pulse check to the impact of global unrest and its cost to our meetings industry, and clients. **The results are clear - the current global unrest is impacting organisers, venues, travel and delegates to meet, learn, exchange knowledge and do business.**

In April 2025, the members of the partner organisations were sent a survey asking them to consider the impacts of the global unrest. The results paint a clear picture of an industry navigating multifaceted pressures, from operational logistics to stakeholder confidence and financial viability. The findings reinforce the need for continued adaptability, contingency planning, and enhanced collaboration across the global meetings and events community.

IAPCO is a trusted global community forged by like-minded professionals driven to improve, learn and share. They are well placed to deliver through complex and challenging circumstances due to their reviewed quality processes, global connections and their deep commitment to continuous improvement.

Almost two thirds of respondents (59.53%) reported that the global conflicts have impacted their ability to plan or host international meetings or events - either moderately (45.24%) or significantly (14.29%).

Furthermore, 25% of IAPCO members have had to cancel, postpone, or relocate events due to safety concerns and instability.

Executive Summary continued

In 2024, IAPCO members delivered 19,469 events; within that context 57.14% of members said that between 1 – 10 of their clients' venues had been impacted. With 5.95% reporting an even higher number of between 11 – 20.

And the financial cost is mounting. Over one quarter of respondents (26.83%) said they had experienced losses up to €50,000, and 14.86% experienced losses greater than €150,000.

Members were also greatly impacted by the ability to host leading scientists and academics, especially from the USA as the Trump Administration policies bite. The Trump administration has cancelled or frozen hundreds of billions of dollars' worth of research grants to leading American universities, such as Columbia, Johns Hopkins, and Princeton.

These cuts will reduce the number of young professionals who are trained in fields related to development, end projects that evaluate the impact of aid, and erode the institutional memory of how aid projects are designed, delivered, and assessed.

The impact of such cuts can also be felt in the global meetings industry as academics are unable to present research at conferences that take place every day around the globe. Entire academic and advocacy fields such as global health, climate action, gender equality, and democracy promotion may be irrevocably impacted.

We hope you find the insights and scenarios described in this report of value.

Sincerely,

Martin Boyle

CEO IAPCO

Sissi Lignou

President, IAPCO

Snapshot of results



In a snapshot

59.53% said global conflicts have impacted their ability to plan or host international meetings or events - either moderately (45.24%) or significantly (14.29%).

The areas most affected by ongoing global conflicts include:

Reduced international attendance or participation (52.38%)

Travel disruptions (41.67%)

Security Concerns at event locations (39.29%)

Increase in costs to clients or participants (32.14%)

In a snapshot continued

25% of respondents have had to cancel, postpone, or relocate events due to safety concerns and instability

48.81% of respondents said there has been a shift in preferred event locations, and 22.62% are seeing a decreased willingness to travel internationally

In 2024, IAPCO members delivered 19,469 events alone, so within that context, 57.14% of respondents said that between 1 – 10 of their clients' venues had been impacted, and for 5.95% of respondents this number went up to between 11 – 20

Over one quarter of respondents (26.83%) said they had experienced losses up to €50,000, and 14.64% experienced losses greater than €150,000

Regarding the sweeping reforms from the Trump administration in the USA, almost half, 47.36% of the respondents, said that the changes have affected their ability to plan and execute events. With 22.37% bracing for impact

In a snapshot continued

The two biggest government policies affecting the respondents globally are: **Visa and immigration policies** which affect international delegates (61.84%), and **funding cuts** that impact on academic and scientific experts' ability to travel (59.21%).

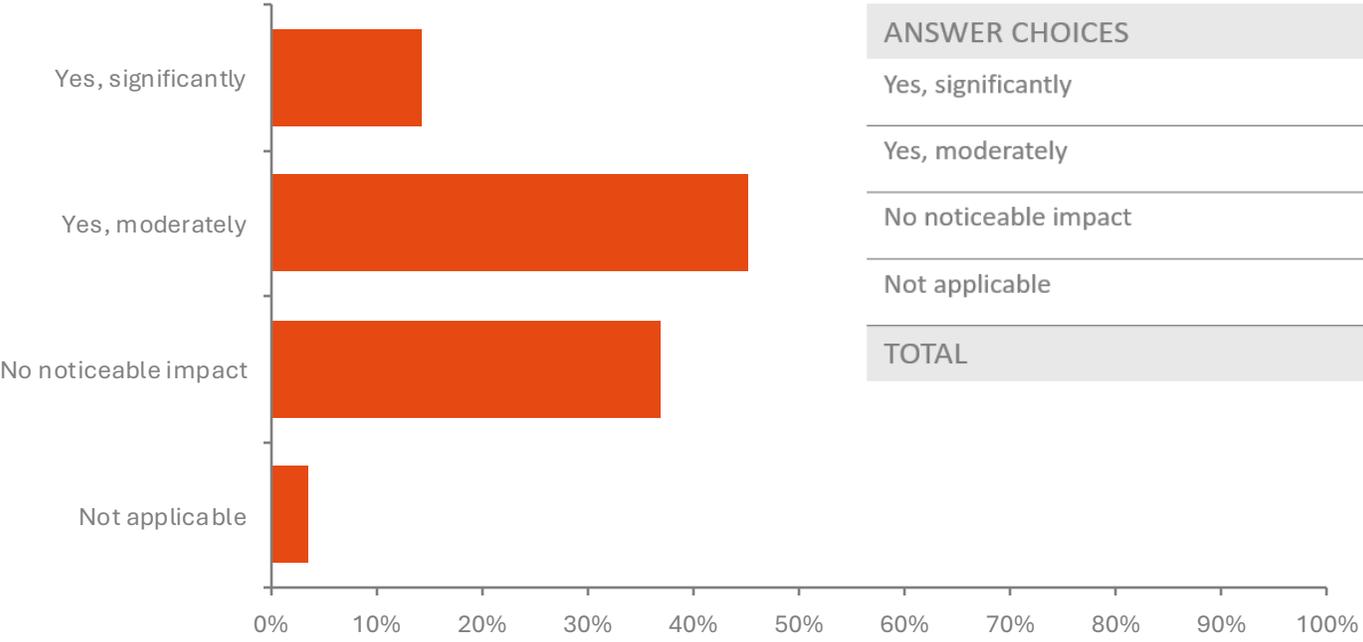
Just under a third of the respondents (31.58%) said that changes in government funding or grants influenced their event budgets, with 19.74% bracing for the pending impact – and almost one fifth (18.42%) were unsure as yet as to the impact.

Over one quarter of respondents (26.31%) said that their ability to secure event venues, permits or necessary approvals had been affected by recent policy changes – with 2.63% of this group being significantly impacted.

Full results

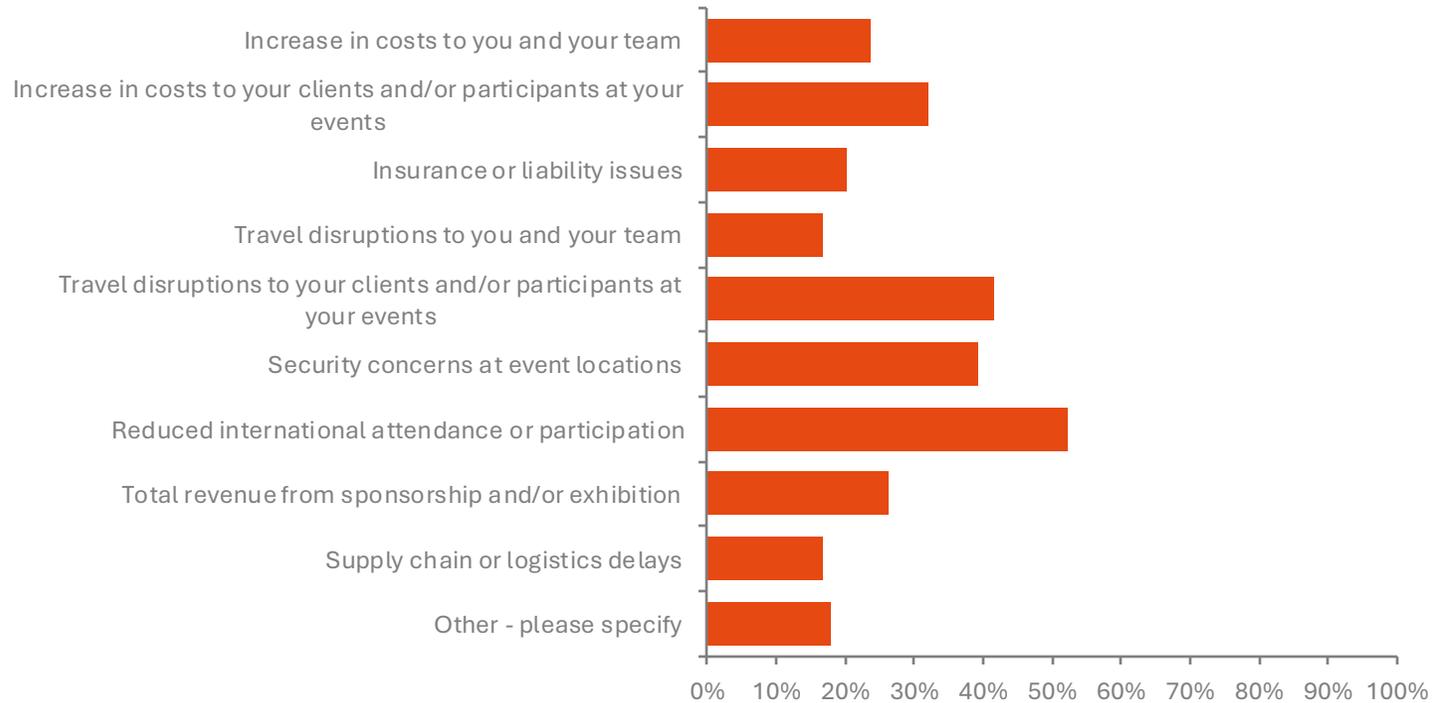


Over the last two (2) years, have the global conflicts (e.g. Russia/Ukraine conflict, Middle East tensions, Red Sea disruptions) impacted your organisation's ability to plan or host international meetings or events?



| ANSWER CHOICES | RESPONSES |
|----------------------|-----------|
| Yes, significantly | 14.29% 12 |
| Yes, moderately | 45.24% 38 |
| No noticeable impact | 36.90% 31 |
| Not applicable | 3.57% 3 |
| TOTAL | 84 |

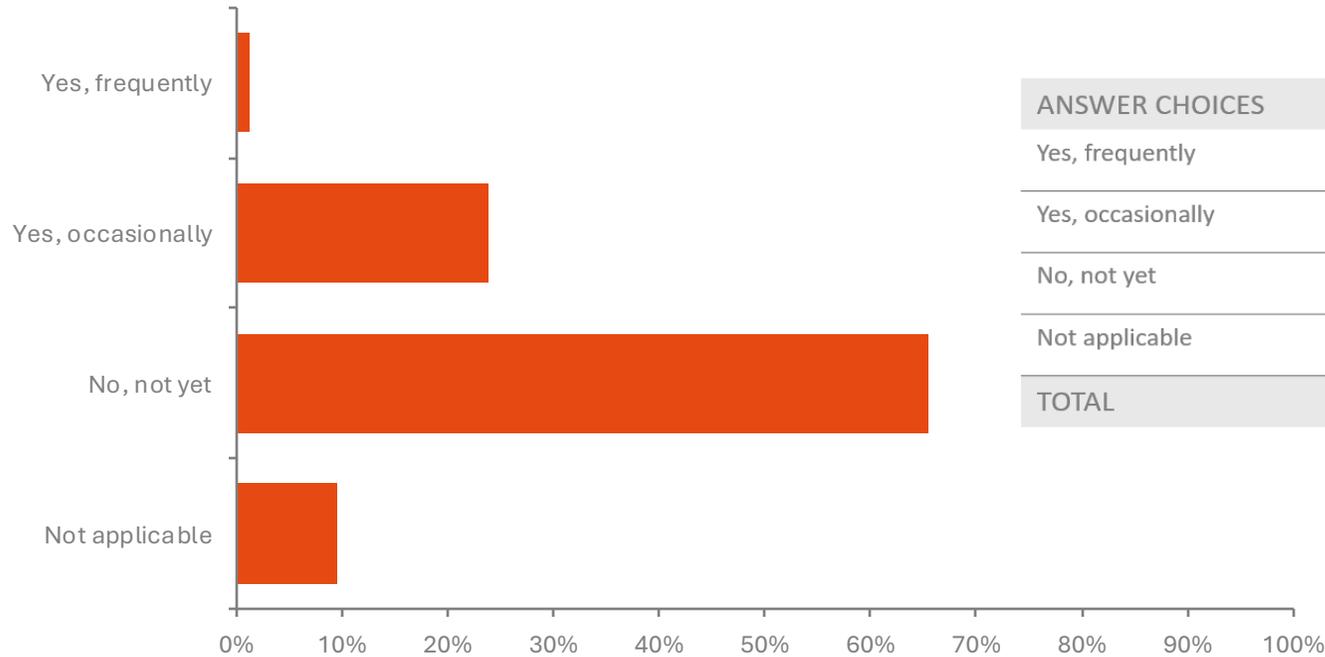
If yes, which areas of your business have been most affected by ongoing global conflicts? (Select all that apply)



If yes, which areas of your business have been most affected by ongoing global conflicts? (Select all that apply)

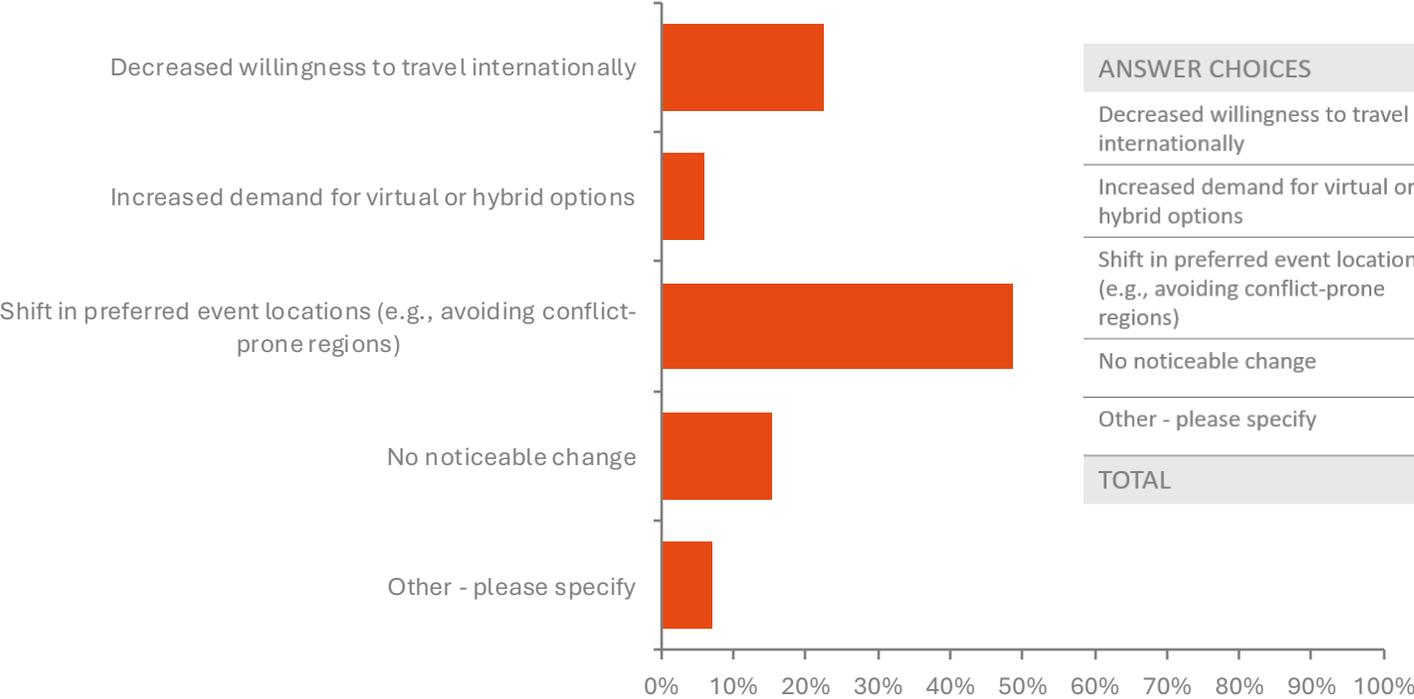
| ANSWER CHOICES | RESPONSES | |
|---|-----------|-----|
| Increase in costs to you and your team | 23.81% | 20 |
| Increase in costs to your clients and/or participants at your events | 32.14% | 27 |
| Insurance or liability issues | 20.24% | 17 |
| Travel disruptions to you and your team | 16.67% | 14 |
| Travel disruptions to your clients and/or participants at your events | 41.67% | 35 |
| Security concerns at event locations | 39.29% | 33 |
| Reduced international attendance or participation | 52.38% | 44 |
| Total revenue from sponsorship and/or exhibition | 26.19% | 22 |
| Supply chain or logistics delays | 16.67% | 14 |
| Other - please specify | 17.86% | 15 |
| TOTAL | | 241 |

Have you had to cancel, postpone, or relocate events and fully planned participations due to safety concerns or instability in certain regions?



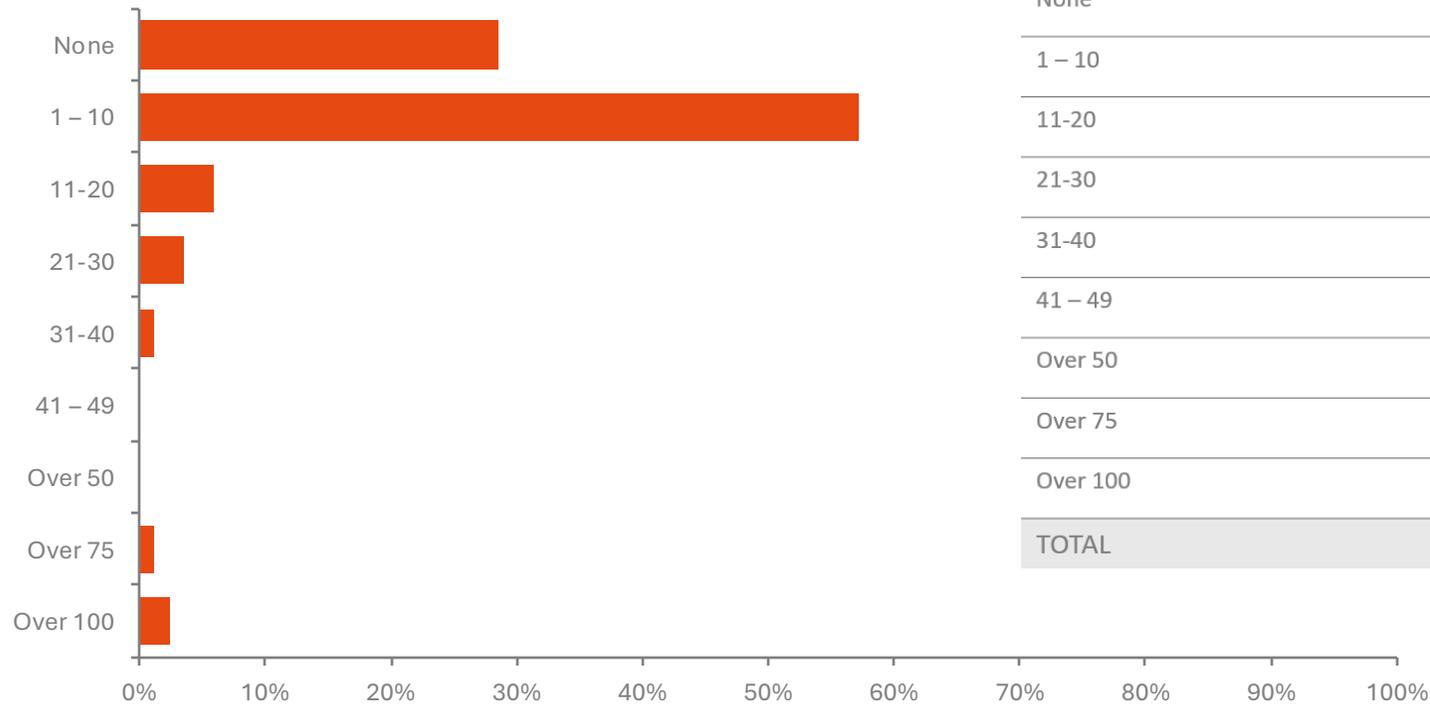
| ANSWER CHOICES | RESPONSES |
|-------------------|-----------|
| Yes, frequently | 1.19% 1 |
| Yes, occasionally | 23.81% 20 |
| No, not yet | 65.48% 55 |
| Not applicable | 9.52% 8 |
| TOTAL | 84 |

In your opinion, how have global conflicts influenced attendee behaviour or event demand?



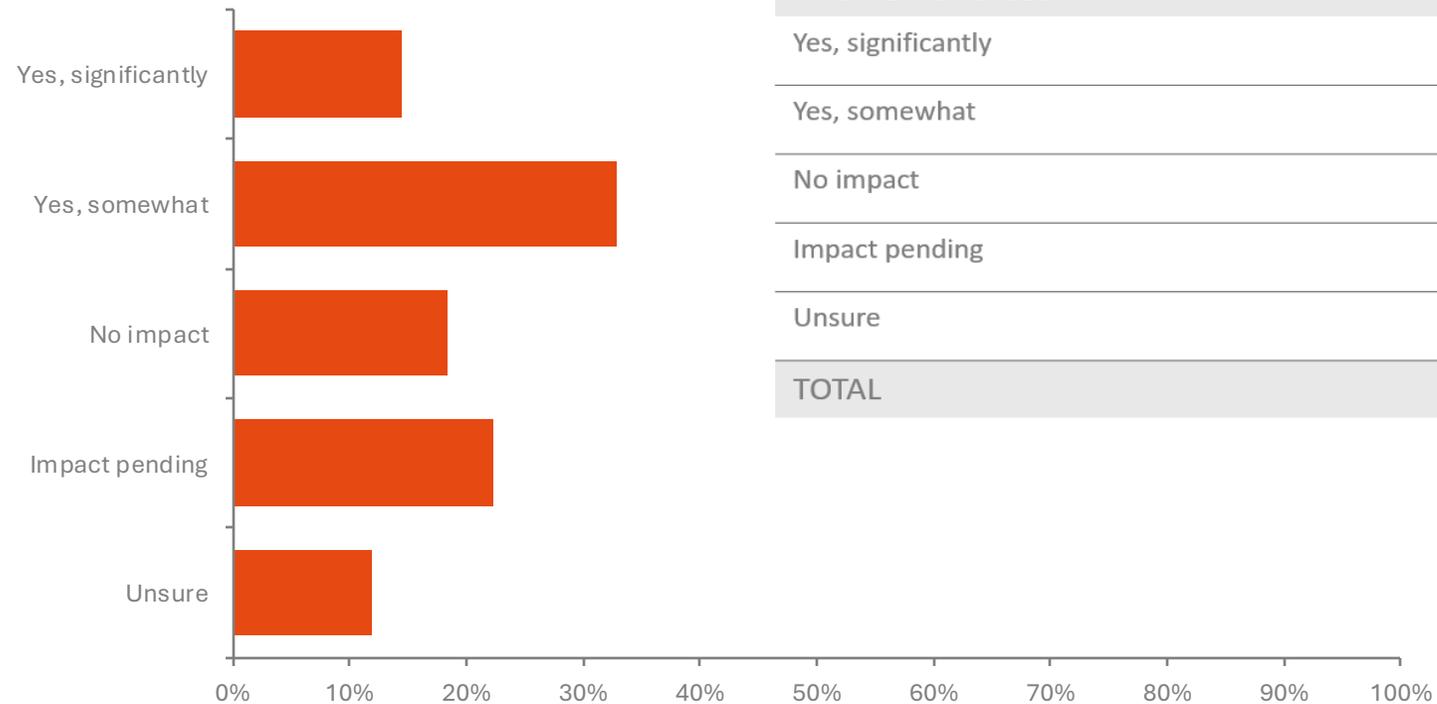
| ANSWER CHOICES | RESPONSES |
|--|-----------|
| Decreased willingness to travel internationally | 22.62% 19 |
| Increased demand for virtual or hybrid options | 5.95% 5 |
| Shift in preferred event locations (e.g., avoiding conflict-prone regions) | 48.81% 41 |
| No noticeable change | 15.48% 13 |
| Other - please specify | 7.14% 6 |
| TOTAL | 84 |

How many of your or your clients' events have been impacted, in general?



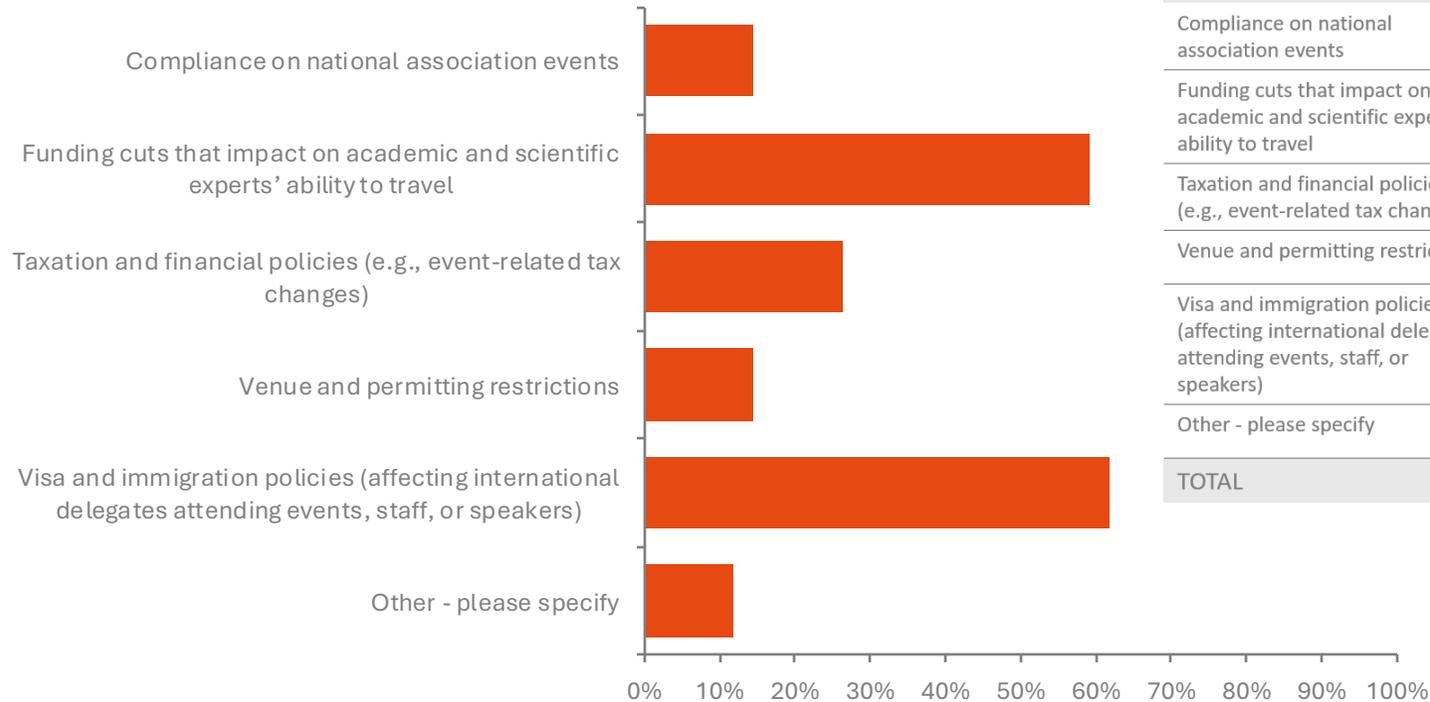
| ANSWER CHOICES | RESPONSES | |
|----------------|-----------|-----------|
| None | 28.57% | 24 |
| 1 – 10 | 57.14% | 48 |
| 11-20 | 5.95% | 5 |
| 21-30 | 3.57% | 3 |
| 31-40 | 1.19% | 1 |
| 41 – 49 | 0.00% | 0 |
| Over 50 | 0.00% | 0 |
| Over 75 | 1.19% | 1 |
| Over 100 | 2.38% | 2 |
| TOTAL | | 84 |

Have recent U.S. government policies (e.g. cuts to education funding, import tax levies, immigration policies) affected your ability to plan and execute events?



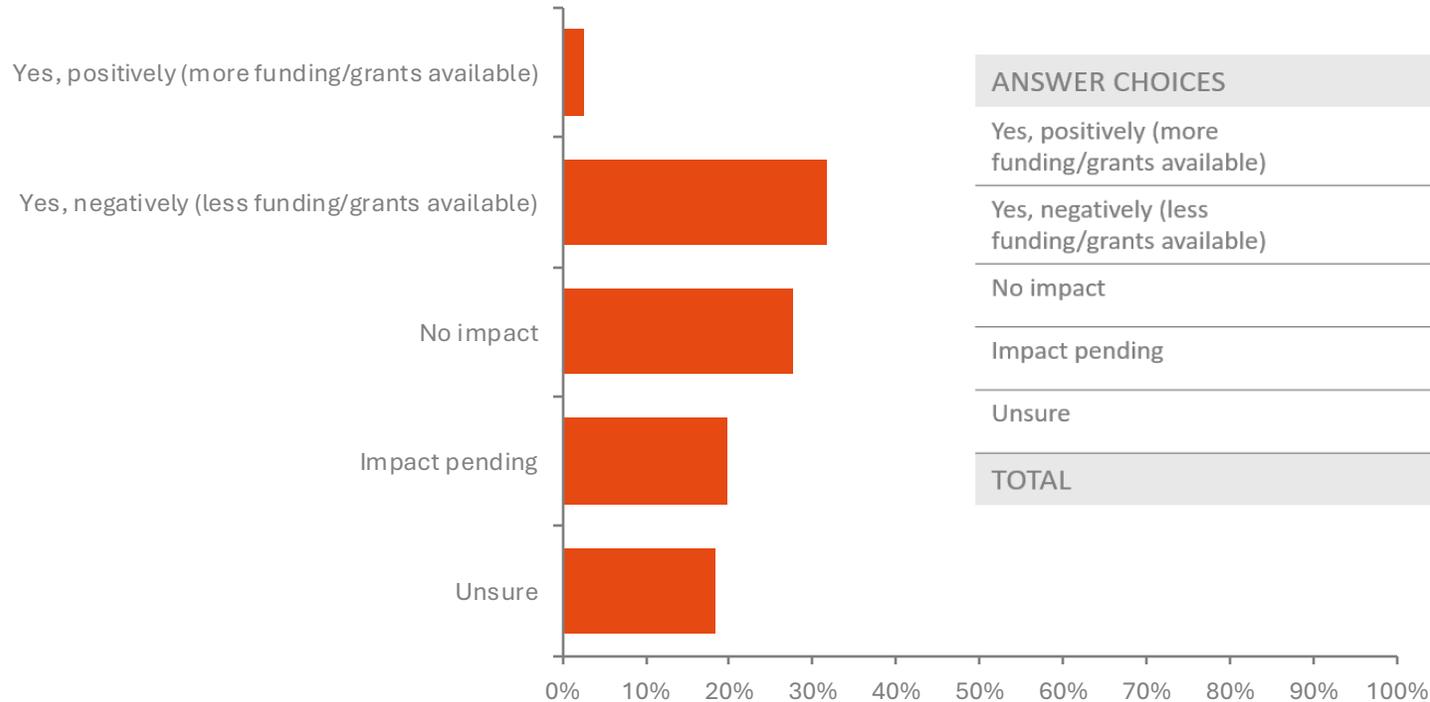
| ANSWER CHOICES | RESPONSES |
|--------------------|-----------|
| Yes, significantly | 14.47% 11 |
| Yes, somewhat | 32.89% 25 |
| No impact | 18.42% 14 |
| Impact pending | 22.37% 17 |
| Unsure | 11.84% 9 |
| TOTAL | 76 |

Which government policies have had the most impact on your event management operations? (Select all that apply)



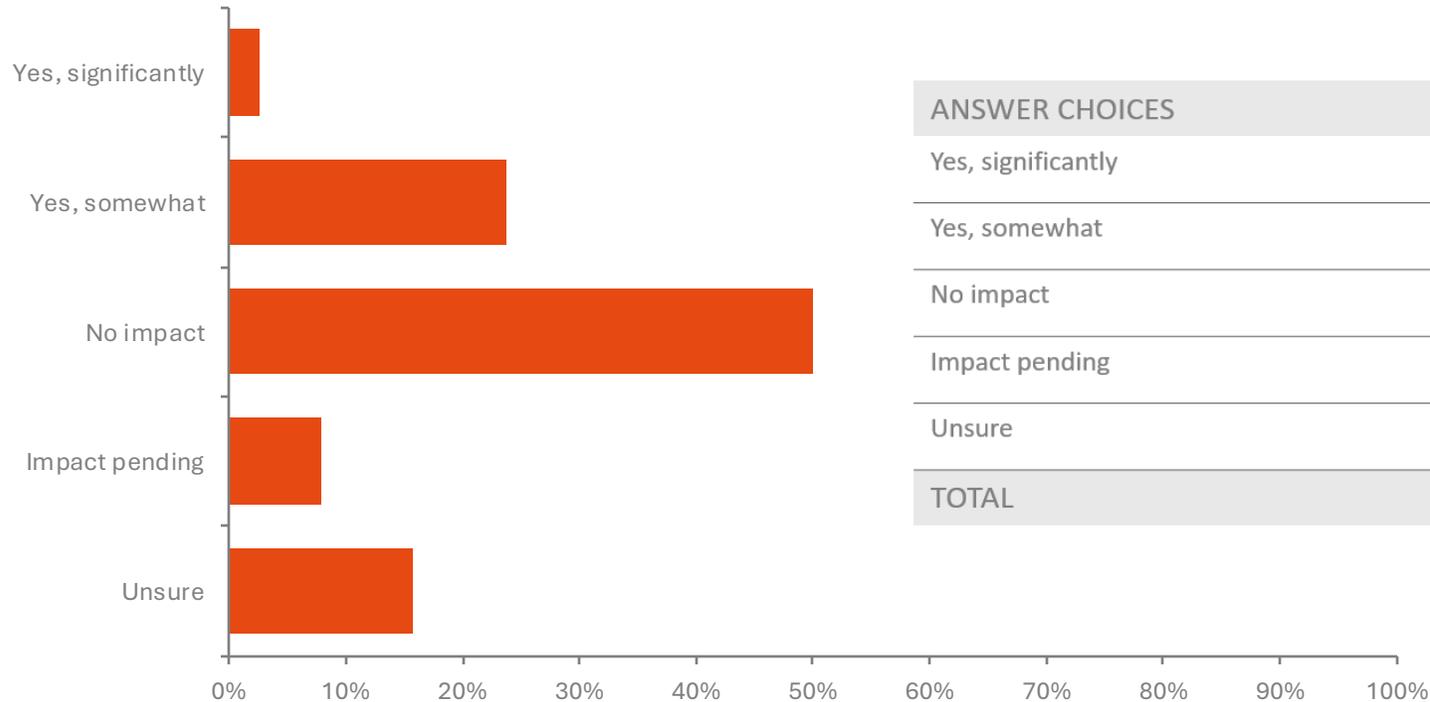
| ANSWER CHOICES | RESPONSES |
|--|------------|
| Compliance on national association events | 14.47% 11 |
| Funding cuts that impact on academic and scientific experts' ability to travel | 59.21% 45 |
| Taxation and financial policies (e.g., event-related tax changes) | 26.32% 20 |
| Venue and permitting restrictions | 14.47% 11 |
| Visa and immigration policies (affecting international delegates attending events, staff, or speakers) | 61.84% 47 |
| Other - please specify | 11.84% 9 |
| TOTAL | 143 |

Have changes in government funding or grants influenced the budget or feasibility of your events?



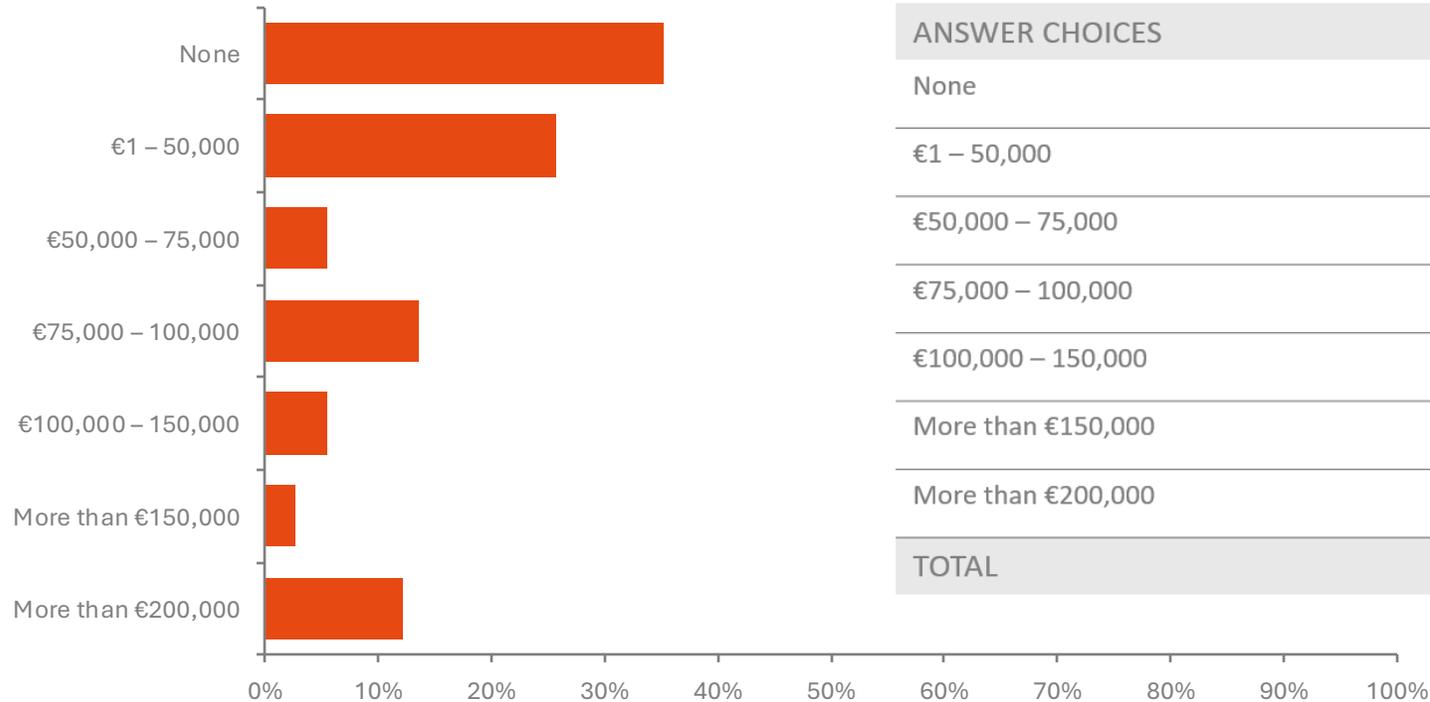
| ANSWER CHOICES | RESPONSES |
|---|-----------|
| Yes, positively (more funding/grants available) | 2.63% 2 |
| Yes, negatively (less funding/grants available) | 31.58% 24 |
| No impact | 27.63% 21 |
| Impact pending | 19.74% 15 |
| Unsure | 18.42% 14 |
| TOTAL | 76 |

Has your ability to secure event venues, permits, or necessary approvals been affected by recent policy changes?



| ANSWER CHOICES | RESPONSES |
|--------------------|-----------|
| Yes, significantly | 2.63% 2 |
| Yes, somewhat | 23.68% 18 |
| No impact | 50.00% 38 |
| Impact pending | 7.89% 6 |
| Unsure | 15.79% 12 |
| TOTAL | 76 |

If there has been a negative financial impact, what is the estimated value of any losses suffered (in Euro-equivalent)?



| ANSWER CHOICES | RESPONSES |
|--------------------|-----------|
| None | 35.14% 26 |
| €1 – 50,000 | 25.68% 19 |
| €50,000 – 75,000 | 5.41% 4 |
| €75,000 – 100,000 | 13.51% 10 |
| €100,000 – 150,000 | 5.41% 4 |
| More than €150,000 | 2.70% 2 |
| More than €200,000 | 12.16% 9 |
| TOTAL | 74 |

Thank you.

For more information: www.iapco.org

