

# THE INSIDER'S PERSPECTIVE




Subvention as a catalyst for sustainable and impactful transformation in the Business Events Industry





## Report at a Glance

# From Financial Incentive to Strategic Driver for Sustainable Change

### Who We Asked

-  115 destinations
-  55 associations
-  Surveys, in-depth interviews, and live workshops




### Subvention Use Remains High, But its Role is Evolving

-  77% of surveyed destinations offer subvention
-  55% of associations depend on subvention

Associations are looking beyond financial assistance.

### Mismatch Between What Destinations Offer and What Associations Need

#### Destination Priorities

-  Economic Impact
-  Delegate numbers or hotel nights
-  Sector alignment

#### Association Needs

- Financial support (87%)
- Tools to measure impact (66%)
- Sustainability guidance (53%)
- Local stakeholder connections (45%)
- Accessibility and inclusion support (34%)

### Subvention as a Driver of Change: Momentum, But Not Yet Mainstream



91% of destinations do believe subvention can be a driver for positive change



Only 6% of destinations have fully integrated change-driven objectives into their subvention strategies



62% of associations believe subvention should help drive positive change.

Associations are ready, but many destinations are still in catch-up mode.

### Key Barriers

#### Destinations

- Budget constraints (66%)
- Administrative burden and complexity
- Lack of political support or understanding of subvention's strategic value
- Difficulty measuring impact

#### Associations

- Lack of awareness of subvention availability (55%)
- Complex or inflexible application processes (41%)
- Limited internal resources to manage applications

### From Transaction to Transformation

Subvention is no longer just about economic stimulus. For both, it is becoming a strategic platform for shared value. To fully realise this potential, subvention programmes must evolve!

---

## INTRODUCTION

Subvention has long played a powerful – yet often less transparent – role in the global events industry. Traditionally viewed as a financial tool to attract conferences, its true potential has largely remained untapped. The business events industry is under mounting pressure to transform. Sustainability and societal impact are no longer buzzwords; they're imperatives. Associations, destinations, and suppliers alike are rethinking what success looks like. And in this context, subvention isn't just a means to win business – it might be a lever to drive change.

This new study, a collaboration between [Conferli](#), [#MEET4IMPACT](#), and [GDS-Movement](#), explores how subvention is being used, perceived, and evolving worldwide. It asks a bold question:

***What if subvention could do more than support events - What if it could shape a better future?***

Findings show both challenges and momentum. While transparency, accessibility, and alignment remain pain points, there is a growing willingness – by both associations and destinations – to move from transactional funding to purpose-driven partnerships.

This short version presents selected highlights. The full market study goes deeper, offering detailed analyses, case studies, and examples of best practice to inspire destinations and associations to act.

This research was made possible thanks to the generous support of our partners: Sapporo Convention Bureau and Visit Flanders Convention Bureau.

This is not just another report. It's a call to rethink, realign, and reimagine subvention – unlocking its full potential for **people, planet, and progress**.

[Access all findings, deep-dive analysis, and best practices –  
request the full report here](#)



conferli

---

# Executive Summary

## Reframing Subvention as a Strategic Lever

This market study, explores a fundamental shift in how subvention is understood and applied within the global events industry. While subvention has traditionally functioned as a financial incentive to attract conferences, this research reveals its untapped potential as a driver of sustainability, legacy, and impact.

By engaging 115 destinations and 55 associations through global surveys, in-depth interviews, and live workshops, the study offers a two-sided perspective - revealing how destinations structure and prioritise subvention and how associations perceive, access, and utilise it. The findings uncover both convergence and misalignment - and highlight where innovation, co-creation, and structural change are needed.

### 1. Subvention Use Remains High, But Its Role Is Evolving

77% of destinations currently offer subvention, most commonly as a mix of financial grants and in-kind support. Public/government funding remains the dominant source in Europe and Asia, while North America shows strong use of CVB-funded programmes. In contrast, 55% of associations say they require subvention to support their events — demonstrating its continued importance.

However, associations are looking beyond financial assistance. For many, subvention is seen as a tool to enable more sustainable practices, community engagement, and innovative event formats. This is particularly critical given the cost barriers often associated with more responsible choices (e.g., digital programmes, zero-waste initiatives, public transport).

### 2. There's a Clear Mismatch Between What Destinations Offer and What Associations Need

While destinations continue to prioritise economic impact - delegate numbers, hotel nights, sector alignment - associations place greater value on mission-driven outcomes. The most requested forms of support from associations include:

- Financial support (87%)
- Tools to measure impact (66%)
- Sustainability guidance (53%)
- Local stakeholder connections (45%)
- Accessibility and inclusion support (34%)

Yet only 5% of associations say destinations provide clear guidance on how to use subvention strategically, and just 20% of destinations offer comprehensive support on sustainability or legacy.

---



---

### **3. Reporting and Measurement Are Fragmented, But Widely Acknowledged as a Priority**

64% of destinations state that their reporting systems need to improve. While most require basic reporting (e.g., proof of delegate numbers), very few tie subvention to environmental or societal KPIs. Even fewer offer consistent measurement tools, templates, or third-party evaluations. From the association perspective, only 58% currently measure subvention outcomes. Among them, 94% measure economic impact, but fewer than half assess social or environmental outcomes – mainly due to lack of resources, tools, or clear expectations.

This fragmented landscape presents a clear opportunity: *to standardise reporting frameworks and move toward structured, outcome-based funding.*

### **4. Multi-Tier Subvention Models Are Emerging**

Half of all responding destinations offer more than one subvention programme. These secondary and tertiary programmes often target:

- Local hosts and ambassadors (local academics, local professionals)
- Legacy or community-based initiatives
- Hybrid formats and innovation-driven events

These models tend to shift away from bid-stage support toward confirmed business generation.

Destinations that layer their support effectively (e.g., one programme for bidding, another for sustainability outcomes) are pioneering a more strategic and nuanced approach.

### **5. Subvention as a Driver of Change: Momentum, But Not Yet Mainstream**

Only 6% of destinations have fully integrated change-driven objectives into their subvention strategies, while 22% are actively experimenting with criteria tied to sustainability, legacy, or inclusion. Another 44% express the ambition to evolve in this direction but have not yet implemented formal frameworks.

From the association side, the desire is stronger: 62% believe subvention should help drive positive change. The message is clear – associations are ready, but many destinations are still in catch-up mode.

---

---

## 6. Key Barriers Include Funding, Complexity, and Lack of Shared Language

Destinations cited several challenges in optimising their subvention strategies:

- Budget constraints (66%)
- Administrative burden and complexity
- Lack of political support or understanding of subvention's strategic value
- Difficulty measuring impact

Associations, meanwhile, report:

- Lack of awareness of subvention availability (55%)
- Complex or inflexible application processes (41%)
- Limited internal resources to manage applications

These shared frustrations highlight the need for better communication, simplification, and alignment.

## 7. A New Set of Expectations for the Future

40% of destinations expect to integrate stronger sustainability and impact goals into their subvention programmes within the next 24 months. 31% anticipate increasing measurement and reporting requirements. However, 23% don't foresee any changes – suggesting the pace of innovation will vary significantly.

The associations surveyed were clear about their expectations:

- More flexible and targeted support
- Transparent criteria and application processes
- Access to tools and templates
- Real partnership, not just funding

## Final Insight: From Transaction to Transformation

Subvention is no longer just about economic stimulus. For both destinations and associations, it is becoming a strategic platform for shared value. But to truly deliver on this potential, subvention programmes must evolve:

- From cash handouts to co-created outcomes
- From volume metrics to value-based KPIs
- From fragmented offers to flexible, tiered support
- From opaque processes to transparent, equitable partnerships

This report is a call to action. The tools, the will, and the models exist. What's needed now is leadership, alignment – and the courage to shift the system.

---

# Subvention (Mis)match Matrix

## Association Needs versus Destination Offers

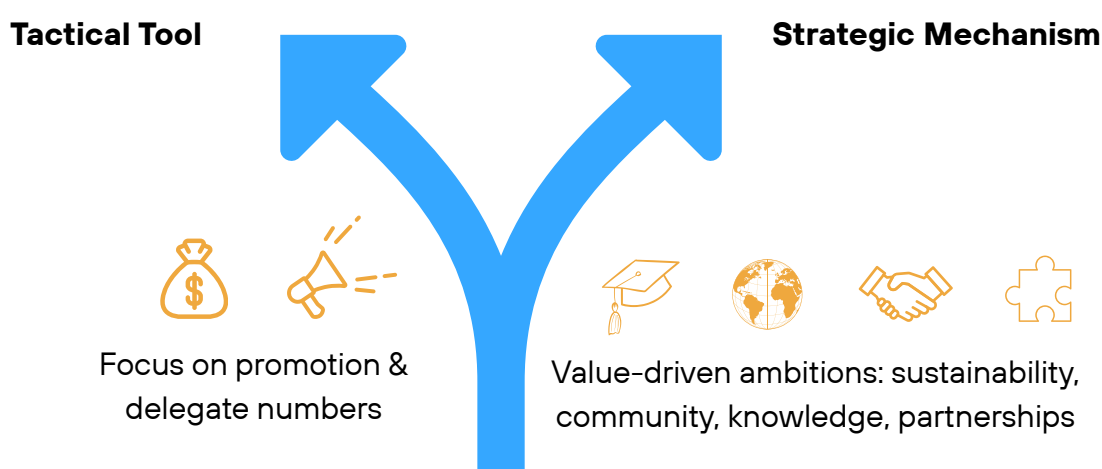
Association Needs	% Associations Indicating This Need	% Destinations Offering It	Gap Identified
Financial support (grants, venue discounts)	67%	53%	Moderate alignment
In-kind support (services, local transport)	77%	44%	Underprovided
Tools to measure sustainability & legacy impact	66%	20%	Severely underprovided
Guidance on how to use subvention	53%	20%	Critical gap
Support for community engagement or accessibility	34%	29%	Limited availability
Stakeholder matchmaking (e.g., local government, academia)	45%	29%	Promising, but not widespread
Clear eligibility and reporting framework missing	95%	47%	Seen as the biggest challenge from both sides

---

## Overall Conclusion: Redefining Subvention for the Next Generation of Events

This research makes one thing abundantly clear: the global events industry stands at a crossroads. Subvention, once viewed primarily as a tactical tool for destination marketing, must now evolve into a strategic mechanism that reflects the complex, value-driven ambitions of today's associations - and the societal shifts that demand new thinking.

### Evolving role of subvention From cost driver to change driver



This dual-perspective study highlights a tension: destinations have long framed subvention around economics, while associations want to prioritise impact, inclusion, and legacy. With 91% of destinations signalling a desire for change, the gap is less about willingness than speed of adaptation. Signs of progress are already visible. Multi-tier models, sustainability pilots, and destination-led legacy initiatives mark a shift from sales agents to facilitators. Associations are ready to co-create, provided the mechanisms are flexible, transparent, and built on trust.

To realise the full potential of subvention, the industry must now adopt a new standard:

For destinations, this means **rethinking the purpose of subvention** from attracting short-term business to enabling long-term transformation. It requires embedding sustainability and impact into application frameworks, tying funding to outcomes, and providing meaningful support beyond cash - through education, data, and strategic partnerships. Equally important, is aligning more closely with association objectives and ensuring greater flexibility in awarding subvention.

For associations, this means **clarifying their ambitions**, proactively integrating sustainability and legacy goals into event planning, advocating for more intelligent and aligned subvention programmes, and systematically tracking their effectiveness.

---



---

This study is not a call to abandon economic logic. Rather, it is a call to expand the value equation – to integrate environmental and societal outcomes alongside delegate spend and room nights. Because in the future, success will not be defined solely by size, but by substance.

If destinations and associations can build subvention frameworks that reflect this new reality – **collaborative, measurable, and mission-aligned** – then subvention will no longer be seen as a tool for bidding. It will be recognised as a **tool for building**: stronger communities, greener cities, empowered associations, and a future-ready global events industry.

That is the real challenge – and opportunity. To move subvention from bidding tool to building tool, we need a shared roadmap. That's why we are creating a practical **guidebook/ toolkit** for destinations and associations: a framework to design, implement, and evaluate subvention programmes from both perspectives. It will help cities align with association missions, measure effectiveness beyond delegate numbers, and test models that reward sustainability, legacy, and community outcomes. This will not be theory but a hands-on playbook for the next era of subvention – to be released at the end of this year.

We invite associations and destinations to contribute their insights, so this becomes not just a guide, but a shared industry standard.



---

# Strategic Recommendations: Moving from Intention to Action

The findings in this report clearly show that the industry is ready for a fundamental reset. Below are strategic, actionable recommendations tailored to both destinations and associations to help transition subvention from a transactional tool to a transformative force.

## For Destinations



---

### ***Reframe Subvention as a Strategic Policy Instrument***

- Integrate subvention into broader city, regional, or national policies on economic development, innovation, sustainability, and inclusion.
- Move beyond marketing or tourism metrics and ensure alignment with long-term strategic outcomes.

### ***Develop Tiered and Outcome-Based Subvention Models***

- Create multiple programme layers (e.g., bid support, legacy initiatives, hybrid innovation).
- Tie funding to measurable KPIs: delegate diversity, sustainability actions, knowledge transfer, community legacy.

### ***Establish a Clear, Transparent Subvention Framework***

- Define eligibility, criteria, and decision timelines up front.
- Create publicly available toolkits, FAQs, and templates to reduce friction and level the playing field.
- Invest in Measurement and Reporting Tools.
- Adopt or develop standardised KPIs across economic, environmental, and societal dimensions.
- Build post-event reporting into subvention contracts with support from local partners.

### ***Offer More Than Money: Be a Strategic Partner***

- Provide support in legacy planning, impact assessment, and community engagement.
- Facilitate matchmaking with local stakeholders (universities, startups, NGOs, policy makers).
- Ensure subvention frameworks are flexible and adaptable, aligning with association missions and long-term objectives.

### ***Collaborate Across Borders***

- Share best practices with other destinations.
- Join initiatives or work within national frameworks to harmonize subvention strategy and impact reporting.



---

## For Associations



### ***Define Impact Objectives from the Start***

- Clarify the social, environmental, or policy-driven outcomes your event aims to deliver.
- Include these in RFPs and use them to guide conversations with destinations.

### ***Prioritise Partnerships, Not Just Discounts***

- Seek destinations that offer co-creation and flexibility – not just cash incentives.
- Ask for guidance, matchmaking with community partners, and local knowledge integration.
- Ask for subvention in your RFP documentation.

### ***Integrate Sustainability and Legacy into Planning***

- Build subvention into your sustainability plan – not as an afterthought, but as an enabler.
  - Be transparent about how subvention will be used and what outcomes you commit to achieve.
-

---

### ***Collaborate to Strengthen the Case for Smarter Subvention***

- Advocate for impact-based subvention with your destinations and industry bodies.
- Join working groups or initiatives pushing toward unified standards and greater transparency.

### ***Track and Share Your Impact***

- Measure more than delegate numbers: track accessibility, diversity, local engagement, carbon savings.
- Share outcomes back to funders and with peers to build best practice libraries.

### **A Final Word**

For subvention to reach its full potential, both associations and destinations must treat it as more than a grant – it must be a **shared commitment to progress**. That means aligning on goals, investing in relationships, and holding each other accountable for the outcomes we all claim to value: impact, inclusion, innovation, and long-term transformation.

The road ahead is clear. Now it's time to build it, together.



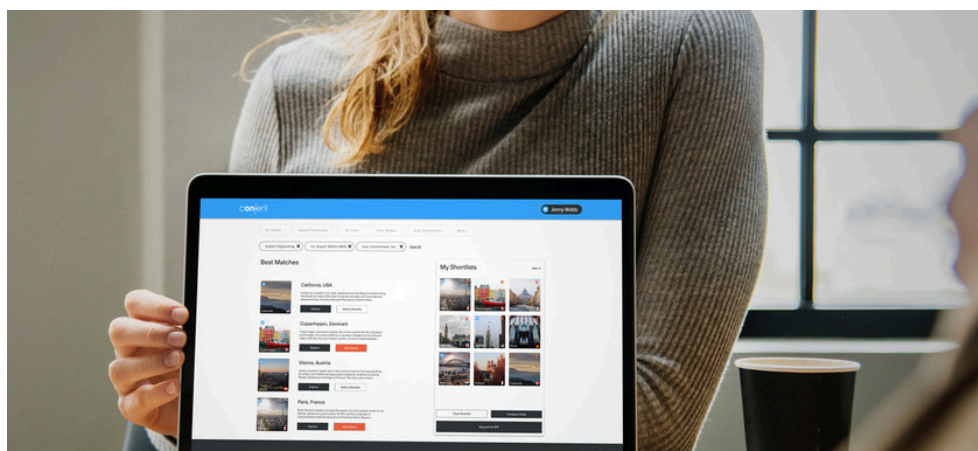


---

## ABOUT CONFERLI

Conferli is a conference matchmaking platform for associations, venues and destinations. Our aim is to level out the playing field in the event industry, enabling events of all shapes and sizes to find best-suited destinations – easily and efficiently. We do that by creating access to independent benchmarking data, supported by smart technology and fueled by our passion for the conference world. Associations will get free support on destination matching, shortlisting, benchmarking and assistance during the entire RFP process.

[www.conferli.com](http://www.conferli.com)



## ABOUT #MEET4IMPACT

#Meet4Impact is a Montréal-based social enterprise dedicated to transforming the global events sector into a driver of positive societal and environmental change. Through its proprietary methodologies and frameworks, it equips destinations, event organizers, and institutions with tools to define, manage, and measure impact aligned with the SDGs and local priorities – helping turn events into powerful levers for transformation.

<https://www.meet4impact.global/>

## ABOUT GDS-Movement

The GDS-Movement is a pioneering, data-driven international change agency that acts to catalyse socio-economic and environmental transformation in cities and regions across the world. Our mission is to empower tourism and events professionals with the mindsets, skill sets, and toolsets to co-create more regenerative and resilient destinations to visit, meet, and live in.

[www.gds.earth](http://www.gds.earth)

---



---

## THANK YOU FOR READING

Questions or suggestions, please contact us

[Access all findings, deep-dive analysis, and best practices -  
request the full report here](#)



NIENKE VAN DER MALEN  
CEO CONFERLI  
NIENKE@CONFERLI.COM



BREGJE FRENS  
CCO CONFERLI  
BREGJE@CONFERLI.COM



GUY BIGWOOD  
CEO GDS-MOVEMENT  
GUY@GDS.EARTH



GENEVIEVE LECLERC  
CEO MEET4IMPACT  
GENEVIEVE@MEET4IMPACT.GLOBAL

---