

Gulf events disruption driven by coordination breakdown, not capability, new Northbourne Advisory analysis finds

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'Mapping Disruption' shows how events have become the clearest real-time signal of regional recovery confidence

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20 April 2026— Northbourne Advisory today released *Mapping Disruption*, its new analysis of the impact on events during the first seven weeks of the US–Iran conflict, finding that disruption across the Gulf's events sector was driven not by physical constraints, but by the gap between what the region could do and what the rest of the world believed it could do.

Northbourne's analysis—the only comprehensive picture of what is happening across the region's events landscape—tracked more than 275 events across the UAE, Qatar, Saudi Arabia, and Bahrain, demonstrating a clear pattern: postponement, not cancellation.

Justin Kerr-Stevens, CEO of Northbourne Advisory, said: “What we have seen over the first seven-weeks of the conflict is a reconfiguration of the Gulf’s events economy in real time. Events are one of the earliest and most visible indicators of confidence, and what they showed was that events didn’t stop because they couldn’t happen. They stopped because insurers wouldn’t underwrite them, organisers didn’t have a shared operating picture, and international participants no longer had confidence to attend.”

Events reliant on international delegates were among the first to cancel, while regionally driven events proved more resilient, highlighting the role of perception as much as reality.

“We’ve seen a clear market split has emerged between events with regional and those relying on international participants. This divergence suggests that the disruption has, so far, been driven as much by external perception of regional safety as by conditions on the ground” Kerr-Stevens added.

Another key finding from Northbourne’s analysis shows a significant reshaping of the Gulf events calendar, with 99 events postponed and a growing concentration of activity into the October to December period.

Kerr-Stevens also commented, “The decision to postpone rather than cancel reflects underlying confidence in the region’s long-term trajectory and demonstrates how confidence has shifted through the system. But it also creates a new challenge with an unprecedented concentration of

activity into a single period, where competition for attention, participation, and visibility will be significantly higher.”

Key data from Northbourne’s research, covering the period 28 February to 17 April, found:

- 99 events postponed or rescheduled
- 45 cancelled
- 29 left in limbo
- 20 events rescheduled to the Gulf autumn period (October to December)

“This conflict has caused more event disruption in a shorter timeframe than any previous Gulf crisis except COVID, but unlike the pandemic, the underlying demand has not disappeared. It has been deferred. The question is whether recovery follows the rapid rebound pattern of 2019 or the extended trajectory of 2020 to 2022. The answer will depend in large part on signals sent from the insurance markets, airspace normalisation, and the quality of joined-up recovery communications,” said Kerr-Stevens.

Mapping Disruption provides detailed analysis of disruption patterns, system-level constraints, and recovery dynamics, alongside strategic recommendations for governments, organisers, and communications leaders.

To support governments, organisers, and communications professionals navigating this environment, Northbourne Advisory continues to distribute its daily tracking dashboard, which captures the rolling events calendar and updated insights.

To join the mailing list and keep across daily developments, sign up here: info@northbourneadvisory.com