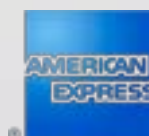


FUTURE ²⁰⁰⁸ WATCH



A Comparative Outlook on the Global Business of Meetings and Events

Presented by:



MEETING PROFESSIONALS INTERNATIONAL



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12:01 P.M. TAKE LUNCH.**

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FUTUREWATCH 2008 PARTICIPANTS

611 Client-side planners:

corporate, association, government, non-profit and others planning meetings and events for clients internal to their organization

265 Meeting management and service professionals or intermediaries:

independent planners, PCOs (professional conference organizers) and those working for third-party, multi-management, site selection or other meeting services providers

732 Meeting and event suppliers:

meeting facilities such as hotels and resorts, convention and conference centers and unique venues, convention and tourism bureaus, transportation providers and other onsite service providers such as caterers and production companies

*Please note:

In every instance where the title “meeting professional” is referred to, it is meant to be inclusive of the “event professional” as well.

OVERVIEW

For the sixth consecutive year, the annual **FutureWatch** survey conducted by Meeting Professionals International (MPI), in partnership with American Express, takes the pulse of the meetings and events industry and reports on industry trends expected for the coming year. As in years past, the trends presented in **FutureWatch 2008** reflect the economic and societal trends impacting the world.

Based on survey responses from 1,643 meeting professionals, **FutureWatch 2008** provides a portrait of an industry that is strong, thriving and moving quickly to meet a variety of internal and external challenges.

In this year’s study, we asked planners to report on the trends internal to their organization, such as:

- Workload
- Budgets
- Shifting organizational goals and strategies
- Centralization of the planning function
- Use of virtual, or webcast, meetings and the current and future involvement of planning departments in those activities

Planners, suppliers and meeting management and service professionals were asked to report on the more global trends expected to impact the industry:

- Various factors impacting the cost of doing business, such as the cost of oil and gas and general inflation
- Possible economic downturn or recession
- Increasing globalization of both client- and supplier-side organizations

Finally, we asked respondents to identify trends in how planners, suppliers and meeting management organizations might work together in tomorrow’s marketplace. Topics include:

- The technologies planners will seek in 2008 and the availability of solutions
- Tomorrow’s outsourcing – what will be outsourced and to whom?
- Where suppliers’ clients reside, whether within or outside the organization
- The successes and challenges of preferred vendor programs and the involvement of procurement departments in the purchasing process
- The steps suppliers are taking to build loyalty among their planner clients and what planners would prefer
- Location of meetings across the regions of the world and types of venues



QUICKSTATS

- Meeting planners and suppliers generally predict a steady market for meetings and events over the next year, with little or no change in overall volume.
- Planners foresee healthy increases in average meeting attendance from 2007 to 2008—by 11% for corporate meetings, 18.3% for association events and 19% across all conferences.
- Budgets and workloads are important in-house issues facing meeting professionals. A large proportion of respondents also expect to be involved with shifting goals and strategies within their organizations. Economic issues, fuel costs and changing technologies lead the list of external issues and trends.
- A growing number of meeting professionals—19% overall, 31% in Europe and 29% in Canada—list conservation and environmental concerns among the top three external trends affecting their work. Six percent overall, 12% in Europe and 10% in Canada list these concerns as their leading external trend.
- Labor shortages are roughly twice as important for suppliers and independent planners as they are for corporate and association planners, suggesting that concern over the ability to hire and retain qualified employees is gradually permeating the industry.
- Meeting planners predict an 11% increase in their budgets over the next year, although expectations vary across sectors—while corporate planners anticipate a 27% increase and association planners expect their budgets to shrink by 9.3%. Spending on individual meetings will grow by 22.6% between 2007 and 2008, the equivalent of a doubling every 3.1 years.
- Although meeting professionals will make use of a wide variety of onsite technologies in 2008, they are not always satisfied with the adequacy, availability, accessibility or affordability of those technologies.
- Two in five meeting planners, and nearly half of corporate planners, expect their use of webcasts to increase in the next year. Three in 10 planners expect webcasts to be a more frequent feature of live meetings, leading to an overall increase in attendance at meetings that combine live and virtual audiences.
- The meetings and events industry is globalizing rapidly. Although the majority of **FutureWatch 2008** respondents work for organizations with operations in only one country, 20% expect their global reach to expand over the next year. And companies with the widest spheres of operation are most likely to expand—57% of respondents in organizations with offices in six or more countries expect expansion in 2008.
- Less than one-fifth of meetings business is predicted to be outsourced in 2008, but the total will still represent a 13% increase in volume and a 13% increase in spend over 2007. Buyers are three times as likely to outsource logistics and meeting services, as opposed to broader meetings strategy development.
- **FutureWatch 2008** reveals a small reversal of the trend toward centralization of responsibility for meetings functions, with fewer corporate planners working in completely centralized environments compared to last year. Consolidation of meetings and events budgets across entire organizations is still on the rise.
- The large majority of **FutureWatch 2008** respondents report some role for procurement and purchasing departments in meetings and events, and that role is expected to increase over the next year. However, only about one in four respondents report significant cost savings or service improvements as a result. Almost half said procurement has “created significant frustration or difficulty” with contracting processes, timing or decision-making.
- In their dealings with meeting facilities, planners are more likely to choose city hotels than any other type of venue. Resort hotels are primarily of interest to corporate and independent planners, particularly in the United States. Conference centers and university settings are most likely to draw government-hosted events and are most popular in Europe, while convention centers will draw the largest share of their business from association and independent planners.
- Meeting professionals expect hotel rates to increase by an average of 8% over the next year.

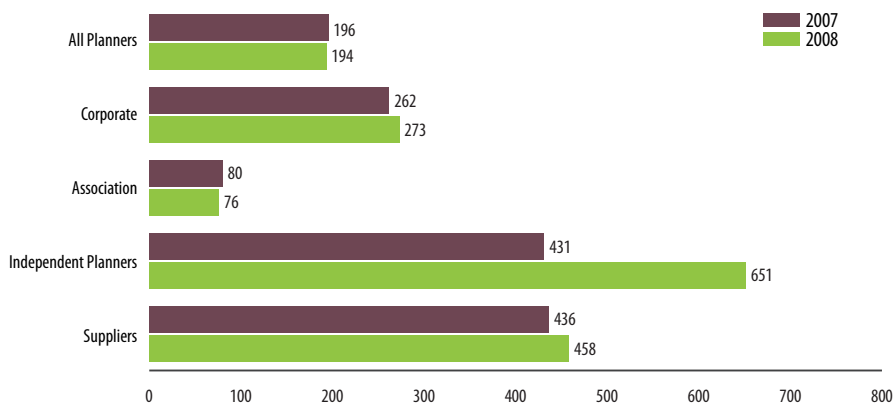
A STEADY MARKET

For the most part, **FutureWatch** respondents predict a steady meetings market over the next year, with most categories foreseeing little or no change in the number of meetings they will organize or supply. Although independent planners are the only group looking ahead to significant growth, there is little concern about the slowdown that has been predicted in some industry publications.

- Corporations were far more likely than associations or government agencies to organize 100 or more meetings in 2007, and planners predict the same trend for 2008. Overall, the number of planners who expect their organizations to arrange 100 or more events declined from 148 in 2007 to 125 in 2008. (See chart on page 5)
- The overwhelming majority of organizations involved with 100 or more meetings are based in the United States.
- The majority of respondents in all categories (55.7% for 2007, 52% for 2008) expect to be personally involved with 30 or fewer meetings, although almost one-quarter (22.7% for 2007, 23.7% for 2008) say they will have a hand in 50 to 200 events.

- Meeting planners foresee healthy increases in average meeting attendance from 2007 to 2008—by 11.2% for corporate meetings, 18.3% for association events and 19.3% across all conferences, after accounting for a relatively small sample of government planners. Somewhat higher numbers of meeting planners expect their events to draw 500 or more attendees, though roughly two-thirds (68.4% for 2007, 65.1% for 2008) expect average attendance in the 50 to 500 range. Corporate planners predict average turnouts of 278 in 2007 and 308 in 2008, while association planners anticipate 600 in 2007 and 710 in 2008. (See chart on page 5)

EXPECTED NUMBER OF MEETINGS BY RESPONDENT CATEGORY



PREDICTED AVERAGE ATTENDEES PER MEETING

Attendance Category	All Planners		Corporate		Association	
	2007	2008	2007	2008	2007	2008
1-49	14.1%	13%	15.8%	14.9%	11.8%	10.8%
50-99	25.2%	20.9%	29.8%	23.8%	18.9%	16.8%
100-199	23%	22.4%	21.3%	21.5%	24.5%	23.2%
200-499	20.3%	21.9%	19.5%	21.5%	21.4%	22.2%
500+	17.4%	21.9%	13.6%	18.2%	23.5%	27%
Avg. Attendance	405	482	278	309	600	710

PREDICTED AVERAGE LENGTH OF MEETING

Length in Days	All Planners		Corporate		Association	
	2007	2008	2007	2008	2007	2008
1	22%	21.7%	16.1%	17.5%	26.8%	25.1%
2	25.8%	25.6%	25.3%	24.5%	27.2%	26%
3	32.8%	33.6%	37.8%	39.3%	27.2%	27.9%
4	12.4%	11.7%	13.8%	12.5%	11.4%	11.9%
5	5.8%	5.8%	6.3%	5.1%	5.7%	7.3%
6+	1.3%	1.6%	0.7%	1.2%	1.8%	1.8%
Avg. Length	2.6	2.6	2.7	2.7	2.5	2.6

- The majority of planners (58.6% for 2007, 59.2% for 2008) expect their meetings to run an average of two to three days, and the large majority (80.6% for 2007, 80.9% for 2008) place their events in the one- to three-day range.
- Corporations tend slightly toward longer meetings of three to five days compared to associations.

IN-HOUSE TRENDS: BUDGETS, WORKLOADS AND THE EMERGENCE OF STRATEGY

For the fifth year, **FutureWatch** asked respondents to list the three most important internal trends they will face in the year ahead. While budget and workloads continue to dominate as hot-button concerns in most member categories, the data points to an emerging focus on the strategic purpose of meetings and a more senior role for the people who produce and supply them.

- Budget changes are the leading trend in 2008, placing as a top concern for three out of 10 independent planners, four out of 10 in all other planner and supplier categories, and four out of 10 overall.

- Shifting organizational goals and strategies are a priority for 40% of association planners and nearly 30% of respondents in all member categories.

- Workloads are the second-ranked trend for corporate and independent planners and placed third overall.
- Nearly one-third of corporate planners expect changes in the way their organizations view or use meetings, while one-quarter of suppliers anticipate changes in attendee preferences and expectations.
- Familiar issues like lead times, outsourcing, meetings centralization and the role of procurement received relatively low priority, with one exception: Independent planners are considerably more likely to predict changes in the use of outsourcing and the role of procurement over the next year.

Respondents' write-in responses point to meetings technology, globalization, exchange rates, changes and expansion in the supply of meeting facilities and what one member calls the "explosion of the sustainability and energy efficiency market" as important emerging issues.

"Our organization is always moving and changing, so flexibility in the fulfillment of the job is required," commented one respondent. With increased use of the Internet, "the pitch is getting bigger and bigger, so the offer needs to be more original and more special. Uniqueness and experience will be main specifications for meetings and events."

TOP INTERNAL TRENDS, 2008

All Respondents

1. Budget changes
2. Shifting goals and strategies within organization
3. Workloads

Corporate

1. Budget changes
2. Workloads
3. Changes in the way meetings are viewed or used in-house

Association

1. Budget changes
2. Shifting goals and strategies within organization
3. Workloads

Independent

1. Budget changes
2. Workloads
3. Changes in use of outsourcing

Suppliers

1. Budget changes
2. Shifting goals and strategies within organization
3. Changes in attendees' preferences and expectations

EXTERNAL TRENDS: FRETTING ABOUT THE ECONOMY

For suppliers, in particular, economic worries outweigh all other concerns in **FutureWatch** respondents' assessment of the external issues and trends their organizations will face in 2008.

And what a difference a year can make! In 2007, meeting professionals cited the impact on business travel of terrorism and war as the most serious external trend facing the industry. In 2008, the issue placed 10th, with only 13.6% of **FutureWatch** respondents identifying it as a top concern.

- Inflation and the prospect of an economic downturn or recession are on the radar for all respondents, but particularly for suppliers and association planners. More than two-fifths of suppliers say an economic downturn will affect their business in 2008, and almost the same proportion of association planners expressed concern about inflation and rising costs. Among suppliers, and across all respondent groups, the proportion predicting a recession outnumbered those who expected a stronger economy by a 2.5:1 margin.

- Worries about an economic downturn are slightly more pronounced among sales professionals, and significantly more so for respondents from the United States: Recession fears emerged as a top concern for 40% of meeting professionals in the U.S., compared to 24.1% in Europe and 22.8% in Canada. Similarly, inflation is an immediate concern for 36.2% of U.S. respondents, but only 20% of Canadians and Europeans.

- Suppliers' concerns about oil and gas costs and their impact on travel are sufficient to propel the issue to second spot in respondents' list of external trends. The issue is particularly prevalent in the United States, where 36.3% give it a high ranking.

- Changes in technology are the top-ranked trend for corporate and independent planners, and placed fourth overall. One-quarter of **FutureWatch** respondents and one-third of association planners point to increased access to and availability of online information.

- Conservation and environmental concerns emerged as a trend to watch. Nineteen percent of respondents—including 30.7% in Europe and 29% in Canada—place the topic in their top three. Six percent overall, 12.1% in Europe and 10.3% in Canada list it as their leading external trend.

TOP EXTERNAL TRENDS, 2008

All Respondents

1. Economic downturn and recession
2. Cost of oil and gas
3. Inflation/rising costs
4. Changes or advances in technology
5. Increased access to information online
6. Environmental concerns

Independent

1. Changes or advances in technology
2. Economic downturn and recession
3. Globalization of markets
4. Inflation/rising costs
5. Increased access to information online
6. Cost of oil and gas

Corporate

1. Changes or advances in technology
2. Inflation/rising costs
3. Economic downturn or recession
4. Cost of oil and gas
5. Government regulation
6. Increased access to information online

Suppliers

1. Economic downturn or recession
2. Cost of oil and gas
3. Inflation/rising costs
4. Increased access to information online
5. Changes or advances in technology
6. Environmental concerns

Association

1. Inflation/rising costs
2. Changes or advances in technology
3. Increased access to information online
4. Economic downturn or recession
5. Cost of oil and gas
6. Aging population

DIFFERENT VIEWS

Although meeting professionals are fairly consistent in their identification of leading trends, **FutureWatch** revealed a number of differences in perspective and experience across industry groupings.

- Changing technology is of considerably greater interest to planners in all categories than to suppliers.

- Labor shortages are roughly twice as important for suppliers and independent planners as they are for corporate and association planners, suggesting that concern over the ability to hire and retain qualified employees is gradually permeating the industry.

- In a separate question, Canadian planners and suppliers were asked to describe the impact of a labor shortage that is somewhat more advanced in their country than it might be elsewhere. Staffing issues in hotels, restaurants and convention centers emerged as the overwhelming concern, with 77.3% of Canadian respondents—though, curiously, only 72.1% of suppliers—assigning the issue a high ranking. Solid majorities of Canadian respondents say the labor shortage will result in fewer meetings with lower attendance; 37.9% of all Canadians and 52.4% of suppliers predict that some meetings will move to the United States. About one in five corporate planners say the labor shortage will lead companies to hold more meetings in Canada.

- Government regulation is a more serious concern for corporate planners than for any other respondent category. Just over one in five corporate planners identify regulation as a top trend, but the proportion increases to 41.8% among pharmaceutical planners, 30.4% among insurance industry planners and about 25% in the financial and non-pharma healthcare industries.

- Independent planners are more than twice as likely as their association counterparts to see a globalized industry as a top trend for 2008. Globalization is a leading issue for 32.7% of European respondents, 21.4% of Canadians and 15.6% of Americans. About 6% of respondents, but almost 20% of Europeans, see economic opportunities in China and other developing countries as an emerging trend for 2008. Passport and visa regulations are primarily a concern for meeting professionals in Canada—and even there, only 18.6% identified passport access as a leading issue for the next year.

- Association planners are considerably more likely than other respondent categories to see an aging population as a priority concern.

A KNOWLEDGE-BASED INDUSTRY

Out of 1,643 meeting professionals who took part in *FutureWatch 2008*, 99 (6%) teach meeting- or event-related courses at the college level. The group includes 41 suppliers, 32 independent planners and 20 corporate, association and government planners.

The educators were asked to rank the importance of seven different strategies to advance the meetings profession. Better understanding of the profession within procurement and finance received a 4.41 rating on a 1 to 5 scale, where 5 is most important, followed by better understanding within marketing and communications and a better ability to assess and report a meeting's impact.

HOW TO ADVANCE THE MEETING PROFESSION

- RANK
- 4.41 Better understanding of the profession with procurement and finance
 - 4.38 Better understanding of the profession with marketing and communications
 - 4.38 Better ability to asses and report the impact of meetings
 - 4.30 Better communication and collaboration between the industry and university/college programs
 - 4.28 Better understanding of the profession within human resources
 - 3.99 More research in the field
 - 3.96 More defined career paths



MEETING BUDGETS: AN UPWARD TRAJECTORY

The 611 corporate association and government meeting planners who responded to **FutureWatch 2008** generally anticipate an upward trajectory in their 2008 meeting budgets, and in the money they invest in each individual event.

MEETING ORGANIZATION BUDGETS 2007-2008 (%)

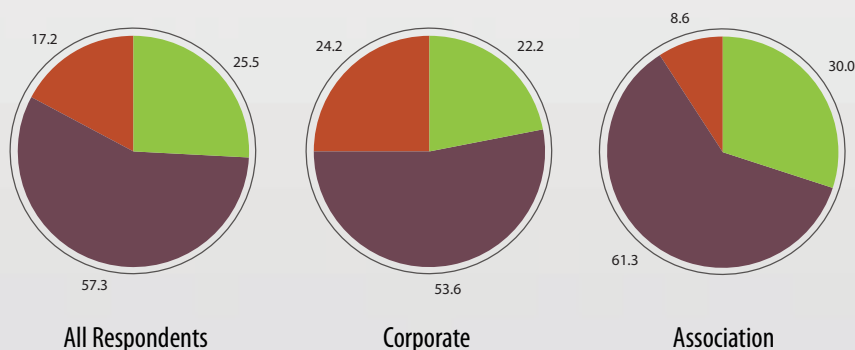
	All Respondents		Corporate		Association	
	2007	2008	2007	2008	2007	2008
under \$200,000	24.6	24.1	14.1	15.4	33.0	30.6
\$200,000 - \$499,999	17.9	16.5	14.1	10.8	22.0	20.0
\$500,000 - \$999,999	8.4	11.4	9.0	9.2	7.5	12.9
\$1 to \$2.5 million	20.1	19.6	19.2	20.0	19.8	18.8
\$2.5 to \$5 million	12.8	12.0	15.4	12.3	9.9	11.8
\$5 million or more	15.1	15.2	28.2	32.3	5.5	3.5
Avg. (\$ million)	3.95	4.40	6.03	7.66	2.46	2.23
Change	11.4		27.0		-9.3	

AVERAGE MEETING BUDGETS 2007-2008 (%)

	All Respondents		Corporate		Association	
	2007	2008	2007	2008	2007	2008
Under \$10,000	23.1	20.3	22.3	18.8	20.7	17.5
\$10,000 - \$49,999	38.3	32.7	32.3	28.7	45.9	31.1
\$50,000 - \$99,999	9.7	15.2	11.5	14.9	8.1	14.6
\$100,000 - \$199,999	10.9	10.6	13.1	12.9	9.0	8.7
\$200,000 - \$499,999	8.0	10.1	9.2	12.9	8.1	8.7
\$500,000 - \$999,999	4.7	6.0	5.4	5.9	4.5	5.8
\$1 million or more	4.3	4.6	4.6	5.0	3.6	4.9
Avg. (\$ million)	\$152,906	\$187,537	\$175,011	\$212,783	\$135,356	\$174,389
Change	22.6		21.6		28.8	
% of meetings that generate profit	32.2		21.3		49.1	

MEETINGS AS A SHARE OF ORGANIZATIONAL BUDGETS, 2008 (%)

■ Higher than 2007
■ The same proportion as 2007
■ Less than 2007



- Although association planners predict a 9.3% decrease in meeting budgets, their corporate colleagues are on track for a 27% increase. As a group, planners predict a budget increase of 11.4%.

- More than one-quarter of planners, and nearly half of corporate planners, will work in organizations with meetings budgets of \$2.5 million or more. Another 20% will have budgets in the \$1 to \$2.5 million range.

- Although association planners report lower budgets overall, their spend on individual meetings will grow even faster than the industry average. For the industry as a whole, the 22.6% increase between 2007 and 2008 will be the equivalent of a doubling every 3.1 years.

- The largest single share of the market—just over half in the association sector and for the industry as a whole—will be in meetings with budgets below \$50,000. Corporate planners will organize a slightly larger share of meetings worth \$100,000 or more.

- Half of association meetings are expected to generate a profit, compared to only one in five corporate meetings. This sharp difference reflects the extent to which non-profit organizations depend on direct revenue from meetings and events, compared to the other types of return that corporations expect from their meetings investment.

- While association planners expect their budgets to remain steady or increase as a share of their organizations' total spending, one in four corporate planners expect their budgets to be cut.



MEETING TECHNOLOGY

A TOUGH SELL

Meeting professionals are generally a tough sell when it comes to the technologies available to facilitate meetings and events.

FutureWatch 2008 invited respondents to rank five top technology areas from a list of 16 options, then assess all 16 for their adequacy, availability, accessibility and affordability. The results show that technology developers have some way to go in meeting the expectations of an increasingly sophisticated market.

TOP TECHNOLOGIES

Across all respondent categories, the most popular meeting technology areas are attendee feedback systems, RFP systems, meetings interaction software, improved Internet access on-site, audiovisual equipment, meeting logistics tools, customer relationship management (CRM) software and attendee identification and tracking systems. But the overall figures mask a range of more specific needs.

- More than half of suppliers, but only 19.3% to 36.6% in different planner categories, attach high importance to technologies that facilitate the RFP process. Two in five suppliers, but only 12% to 23.8% in different planner groups, are interested in CRM systems.

- Government planners express significantly more interest in audiovisual technologies and meeting logistics tools than their colleagues in other areas.
- Badge and registration solutions, radio frequency identification and other attendee identification and tracking systems have landed solidly on the radar of corporate, association and independent planners, and have emerged as a priority for one in five planners.
- Systems to share conference content and course documents are of interest to 40.3% of association planners, but to only 25.3% of **FutureWatch 2008** respondents overall.
- More than one in three corporate and association planners are looking for alternatives to live meetings, but the trend has only registered with 15.8% of suppliers. Tools that allow remote participation in live meetings are of interest to nearly one-third of association and government planners, but only 17.6% of suppliers.

MEETING PROFESSIONALS' 2008 TECHNOLOGY PICKS (%) (ALL RESPONDENTS)

54.0 Attendee feedback systems	28.9 CRM software	24.2 Alternatives to live meetings
39.7 RFP systems	28.8 Attendee ID/tracking systems	23.6 Onsite networking tools
39.4 Meeting interaction software	28.5 Attendee schedulers	22.0 Remote participation tools
39.3 Better onsite Internet access	28.1 Vendor/site selection tools	19.0 Match attendees with relevant content, vendors, exhibitors, peers
38.0 Audiovisuals	25.6 Vendor/site evaluation tools	
35.4 Meeting logistic tools	25.3 Content and document sharing	

MEETING PROFESSIONALS' TOP TECHNOLOGY PICKS FOR 2008, BY CATEGORY (%)

	All	Corporate	Association	Government	Independent	Suppliers
Attendee feedback Systems	54	52.8	54.7	48.0	50.9	55.3
RFP systems	39.7	30.6	19.3	32.0	36.6	52.9
Meetings interaction software	39.4	39.7	39.1	28.0	43.4	38.3
Better onsite Internet access	39.3	36.7	36.6	36.0	33.6	44.5
Audiovisuals	38.0	35.6	38.7	60.0	38.1	38.3
Meeting logistics tools	35.4	37.9	39.1	56.0	37.7	31.3
CRM software	28.9	16.3	14.8	12.0	23.8	42.5
Attendee ID/tracking systems	28.8	37.9	35.8	32.0	35.1	20.1

ASSESSING THE TECHNOLOGIES

READY FOR PRIME TIME? MEETING PROFESSIONALS' ASSESSMENT OF MEETING TECHNOLOGIES, 2008

	Market Flooded	Adequate, affordable, accessible	Adequate but not affordable/accessible	Available but not adequate	No tool or resource
Most Interested ↑					
Attendee feedback Systems	6.3%	37.5%	27.1%	22.3%	6.8%
RFP systems	8.4%	31.1%	25.3%	29.2%	6%
Meetings interaction software	4.6%	32.7%	33.5%	23.3%	5.9%
Better onsite internet access	6%	34.4%	30.9%	23.9%	4.8%
Audiovisuals	6.7%	34.7%	32.2%	20.8%	5.6%
Meeting logistics tools	7.7%	28.1%	30.3%	27.5%	6.4%
CRM software	9.7%	30.9%	29.3%	22.9%	7.2%
Attendee identification/tracking systems	10.1%	30.2%	31.6%	21.9%	6.1%
Attendee schedulers	6.8%	32.1%	32.3%	21.8%	7.1%
Vendor/site selection tools	8%	32.5%	23.6%	28%	7.8%
Vendor/site evaluation tools	4.8%	33.1%	25.7%	26.7%	9.8%
Share content and documentation	7.9%	35.1%	32.2%	19%	5.8%
Alternatives to live meetings	6.8%	32%	35.3%	20.4%	5.5%
Onsite networking tools	5.9%	30.7%	34.9%	23%	5.4%
Remote participation tools	8%	32.4%	31.3%	22.7%	5.5%
Match attendees with relevant content, vendors, exhibitors, peers	6.7%	31.1%	28.5%	26.9%	6.7%
Least Interested ↓					

Even with the technologies they think they will need and use, meeting professionals are not yet satisfied with the options available to them.

- Respondents' ratings of all the technologies fall into a relatively narrow band, with only 35.8% to 43.8% stating that any technology is ready for prime time—that the available options are adequate, affordable and accessible, or that they have already flooded the market.

- Of the eight technology categories of greatest interest to planners and suppliers, only five fall into the top tier for customer satisfaction. RFP systems rank second in importance, but ninth on overall satisfaction and last on adequacy. Meeting logistics tools are third-most important, but rank last on overall satisfaction.

MEETING PLANNERS' VIEW OF WEBCASTS, 2008 (%)

	All	Corporate	Association	Government	Independent
More or much more frequent	40.7	48.1	39.5	36.0	33.2
Steady	30.2	28.3	29.2	32.0	33.6
Less or much less frequent	15.0	12.5	15.6	12.0	19.2
Average (1 - 5 scale)	3.49	3.68	3.41	3.5	3.29

MEETING PLANNERS' VIEW OF WEBCASTS AS A FEATURE OF LIVE MEETINGS, 2008 (%)

	All	Corporate	Association	Government	Independent
More or much more frequent	30.2	36.2	25.9	28.0	27.5
Steady	33.3	29.4	35.4	20.0	37.4
Less or much less frequent	20.1	17.5	21.0	32.0	22.3
Average (1 - 5 scale)	3.18	3.33	3.1	3.05	3.09

WEBCASTS' IMPACT ON LIVE ATTENDANCE AT MEETINGS, 2008 (%)

	All	Corporate	Association	Government	Independent
Increase or greatly increase	8.2	6.4	6.2	12.0	11.7
Steady	49.5	46.6	51.4	44.0	53.2
Decrease or greatly decrease	6.9	7.9	7.0	16.0	5.3
Average (1 - 5 scale)	2.78	2.70	2.75	2.75	2.89

WEBCASTS' IMPACT ON TOTAL MEETING ATTENDANCE, 2008 (%)

	All	Corporate	Association	Government	Independent
Increase or greatly increase	26.9	26.2	21.0	24.0	31.7
Steady	43.1	40.5	49.4	40.0	43.4
Decrease or greatly decrease	4.8	4.7	5.3	8.0	4.9
Average (1 - 5 scale)	3.23	3.21	3.14	3.15	3.29

MEETINGS DEPARTMENTS' EXPECTED ROLE IN ENCOURAGING WEBCASTS, 2008 (%)

	All	Corporate	Association	Government	Independent
Totally or largely involved	39.4	38.8	49.4	52.0	32.1
Average involvement	20.2	19.2	17.3	8.0	25.7
Minimally or not at all involved	27.8	32.7	26.3	28.0	23.4
Average (1 - 5 scale)	3.23	3.12	3.43	3.41	3.18

MEETINGS DEPARTMENTS' POSITIONING AS GO-TO SOURCE ON WEBCASTS, 2008 (%)

	All	Corporate	Association	Government	Independent
Major effort to position	29.0	29.2	34.2	40.0	24.5
Moderate Effort	20.4	19.5	19.3	4.0	24.5
Little or no effort	36.9	42.3	36.2	48.0	30.6
Average (1 - 5 scale)	2.86	2.77	3.02	2.83	2.83

MEETINGS DEPARTMENTS' EXPECTED INVOLVEMENT IN EXECUTING WEBCASTS, 2008 (%)

	All	Corporate	Association	Government	Independent
Totally or largely responsible	26.0	24.2	32.5	20.0	24.2
Average involvement	15.8	14.3	12.8	24.0	19.2
Minimally or not at all responsible	39.3	49.9	37.0	28.0	31.7
Average (1 - 5 scale)	2.71	2.48	2.92	2.94	2.82

THE RISE OF WEBCASTS

Members predict rising use of webcasts, though not necessarily as decisively as the industry buzz would suggest. Two in five meeting planners, and nearly half of corporate planners, expect their use of webcasts to become more or much more frequent in the next year. But across the entire *FutureWatch 2008* sample, a slightly larger proportion says webcasting will hold steady or decline. While the popularity of webcasts received an average rating of almost 3.5 on a 1 to 5 scale, the results still suggest an important place for face-to-face meetings.

Three in 10 planners expect webcasts to be a more or much more frequent feature of live meetings, with corporate planners leading the way at 36.2%.

Planners see little likelihood that webcasts will affect attendance at live meetings over the next year. However, they are more likely to predict an increase in total attendance, live and virtual.

Many meeting planners expect to lead the shift to webcasts, particularly in the association and government markets. When webcasts do take place, association planners expect to be more involved in planning and implementation than planners as a whole; corporate planners expect to be somewhat less involved.

THE GLOBAL FACE OF MEETINGS

Although the majority of *FutureWatch 2008* respondents work for organizations that operate in only one country, their predictions for the next year reflect an industry that is globalizing rapidly. One in five expects their organizations to extend their global reach in 2008, compared to only one in 200 who foresee a decrease.

Moreover, companies with the widest spheres of operation are most likely to expand: 57.3% of respondents in organizations with offices in six or more countries expected expanded operations in the next year, compared to 4.5% of their colleagues whose organizations had not yet entered the international market.

CHANGES IN MEETING PROFESSIONALS' COUNTRIES OF OPERATION

	2007	Decrease	Increase	No Change
One country	59.6	0.0	4.5	86.4
Two countries	56.7	1.1	18.3	65.6
Three to five countries	9.0	1.4	29.1	44.6
Six or more countries	23.7	1.3	57.3	21.6
Total	--	0.5	20.1	64.8

And at a time when MPI is extending its own presence to new regions of the world, 14.4% of respondents, including 15.9% in Canada and 31.0% in Europe, said they had seen increased interest in holding meetings in the Middle East.

THE WESTERN HEMISPHERE TRAVEL INITIATIVE: A MEASURED IMPACT

FutureWatch 2008 invited respondents from the United States and Canada to comment on the impact of the Western Hemisphere Travel Initiative. WHTI is a U.S. Congressional initiative that establishes new passport requirements for travel between the U.S. and Canada, Mexico and the Caribbean. The results indicate that the WHTI has had only moderate impact so far, but could become more significant in the next year.

- One-quarter of Canadian but only 7.4% of U.S. meeting professionals believe WHTI has already led to a major or slight decrease in travel by U.S. citizens to meetings outside the United States. However, 58% of Canadians and 33.6% of Americans expect to see major or slight decreases in 2008.
- Nearly three-quarters of Canadian and more than one-third of U.S. meeting professionals believe attendees have been confused by changing WHTI rules and timelines.
- Nearly half of Canadian and more than one-quarter of U.S. respondents either report or expect that extra work will be required to keep up with the provisions of the WHTI, and that workload might begin with some basic research. Three-fifths of the North American respondents could not say what proportion of U.S. citizens attending their meetings outside the United States held valid passports.

THE BUSINESS OF MEETINGS

Outsourcing will increase moderately, but centralization of meeting functions may be somewhat less prevalent in **FutureWatch 2008** respondents' organizations over the next year.

A GRADUAL RISE IN OUTSOURCING

Less than one-fifth of meetings business will be outsourced in 2008, but the total will still represent a 13.5% increase in volume and a 13.9% increase in spend over 2007.

For 2007, corporate planners reported that 16.5% of their activity would be fully or partially outsourced, compared to 7.75% for association planners, 17.1% for government planners and 13.1% for independents. But that relatively modest base will provide a springboard for respectable outsourcing growth in 2008—by 15.9% for association planners, 14.6% for corporate planners and 6.6% for independents. Government planners predicted that their outsourced activity would decline by 3.7%.

CHANGES IN MEETINGS BUSINESS FULLY OR PARTIALLY OUTSOURCED 2007-2008 (%)

	All	Corporate	Association	Government	Independent	US	Canada	Europe
2007	12.8	16.5	7.8	17.1	13.1	11.7	13.7	20.6
2008	14.6	19.0	9.0	16.5	14.0	12.7	19.2	26.1
Change	13.5	14.6	15.9	-3.7	6.6	8.4	40.3	26.9

CHANGES IN MEETINGS SPEND FULLY OR PARTIALLY OUTSOURCED 2007-2008 (%)

	All	Corporate	Association	Government	Independent	US	Canada	Europe
2007	12.9	14.5	7.7	13.0	18.0	12.2	15.4	17.4
2008	14.7	16.9	9.5	14.0	18.3	13.3	17.4	25.2
Change	13.9	16.4	27.1	7.2	1.6	9.1	12.7	44.7

- The largest increases in outsourcing will occur in Canada and Europe, where relatively small respondent groups predicted growth of 40.3% and 26.9%, respectively. Respondents from the United States anticipated an 8.4% increase.

- The table shows the corresponding increases for meetings spend, with Europe looking ahead to a 44.7% increase for 2008.

Buying patterns show that client-side planners are three times as likely to outsource logistics and meeting services, as opposed to broader meetings strategy development. Independent planners and Europeans are most likely to turn to outside consultants for strategic advice; corporate and government planners most commonly focus their outsourcing on logistics.

FutureWatch 2008 respondents were also asked to identify their most frequent sources of outsourced meeting services. Consistent with past years' results, full-service meeting management firms were the most frequent choice for 2007 and 2008, particularly for corporate and government planners. Site selection companies were the most frequent choice for association planners and for client-side planners in the United States, while independent planners showed a strong tendency to hire other independents when they outsourced. Full-service vendors were considerably more popular in Europe than in North America.

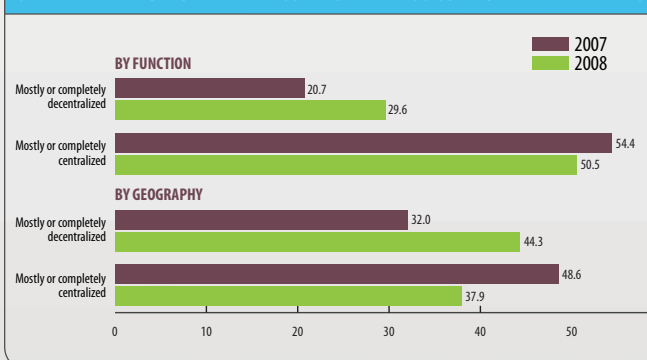
THE PENDULUM SWINGS ON CENTRALIZATION

A small but visible number of organizations appear to be stepping back from the tendency to centralize responsibility for meetings functions with a single individual, team or department.

In 2007, 54.4% of corporate planners reported that meeting functions were mostly or completely centralized within their organizations, compared to 20.7% where meetings were mostly or completely decentralized. In their responses to **FutureWatch 2008**, 50.5% of corporate planners were in centralized environments, compared to 29.6% who were not.

The trend was more pronounced across larger geographic distances. In 2007, 48.6% of corporate planners reported that meeting functions were mostly or completely centralized by geography, compared to 32% whose organizations were mostly or fully decentralized. For 2008, the proportions were 37.9% and 44.3%. Europe and Canada both showed stronger tendencies toward geographic centralization compared to the United States.

CENTRALIZATION OF MEETINGS AND EVENTS: CORPORATE PLANNERS



However, even where meeting functions are somewhat less centralized, consolidated spending is increasingly the norm. Nearly two-thirds of corporate and government planners said meeting and

event expenditures were being calculated and reported across the entire organization, an increase of about 12.6% over 2007.

THE PROS AND CONS OF PROCUREMENT

Three-quarters of **FutureWatch 2008** respondents, and almost 85% of respondents in Europe, reported that procurement plays some role in their purchasing decisions. On a 1 to 5 scale, procurement's level of involvement received a score of 3.26 in Europe, 2.48 in Canada and 2.68 across all survey participants.

Meeting professionals' satisfaction with the procurement process was a different story. Out of a small group of 150 respondents who described their experience with procurement:

- Only 24%—none of the 14 government planners in the smaller sample—said procurement processes had led to significant cost savings.
- Only 26.7%—only one out of 14 government planners—believed procurement processes had sometimes led to better rooms, venues, or other services; 15.3% said procurement had led to reductions in service quality.
- 42%, including 10 of the 14 government planners, said procurement had “created significant frustration or difficulty” with contracting processes, timing, or decision-making.

Yet 45% of respondents, including 58.8% in Canada and 66.7% in Europe, expect procurement to become more involved with meetings over the next year, compared to only 7.3% who foresee a smaller role. 25.9% expect procurement to become more knowledgeable about meetings and more helpful to planners, and 22.9% hope procurement agents will become better, more collaborative partners. A couple of respondents said their procurement officers routinely follow their advice on vendor selection; one meetings department had taken over signing authority on procurement's behalf. But 21% of respondents expect the procurement process to become a bigger obstacle to meeting management.

PERCENTAGE OF VENDORS ON PREFERRED VENDOR AGREEMENTS, 2007

	All Corporate	US	Canada	Europe
None	1.2	1.4	0.0	0.0
1-24%	4.4	4.5	3.4	3.8
25-49%	5.5	5.6	0.0	11.5
50-74%	11.7	10.8	10.3	23.1
75-99%	17.2	16.3	24.1	19.2
No PV list	5.8	6.9	0.0	0.0
Don't know	20.7	20.8	34.5	3.8

Despite the growing links between meetings and procurement departments, preferred vendor agreements are by no means standard across the industry. In all jurisdictions except Europe, the majority of corporate planners say their organizations have no preferred vendor program, or have never heard the term. Of the planners who use them, 51% say they are very or extremely satisfied with preferred vendor agreements, and the approach receives an overall rating of 3.56 on a 1 to 5 scale.

The procurement process has already had an impact on the way meetings departments buy outsourced services. Just over one in five independent planners say procurement has had a significant influence on their fee structures; overall, on a 1 to 5 scale, independents give the role of procurement a rating of 2.49. Overall, independents identify project fees as their preferred method of billing, followed by hourly or daily rates and commissions.

A BUSINESS OF RELATIONSHIPS

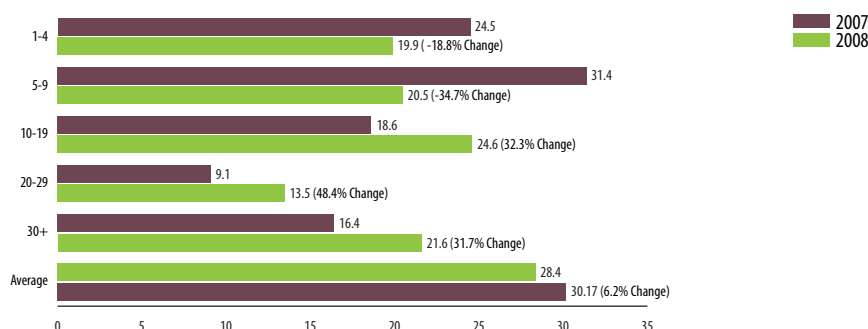
Even more consistently than in past editions of *FutureWatch*, suppliers and independent planners report that their direct client contacts are most often the meeting and event department. For suppliers, the next-most important contact is an independent planner or a professional conference organizer; for independents, it is the department that owns a meeting. Suppliers report to procurement 8% of the time and independents 5.4% of the time.

VENDORS' MAIN IN-HOUSE MEETING CONTACTS (%)

	Suppliers		Third Parties	
	2007	2008	2007	2008
Meetings/events department	39	41	31	33
Outside planners/independent/PCO	24	20	17	17
Department that owns the meeting	16	16	30	29
Procurement	8	8	7	5
Advertising, PR or other non-meeting	7	6	7	7
Other	6	8	8	8

Independents' description of their current and future client base suggests a consolidation and maturing of the third-party planning market, resulting in a considerably more limited number of very small firms. While independents expect their average number of clients to grow only 6.2% between 2007 and 2008, their plans for the next year will translate into a sharp increase in the number of companies with 10 or more clients.

NUMBER OF CLIENTS - INDEPENDENT PLANNERS (%)



NUMBER OF MEETINGS PER CLIENT - INDEPENDENT PLANNERS (%)

	2007	2008	%Change
1	19.0	16.1	-15.3
2	25.5	21.0	-17.7
3-9	34.8	40.6	16.7
10-19	9.8	13.3	35.7
20+	10.9	9.1	-16.5
Average	14.9	12.4	-16.6

- Curiously, while many independents predict an increase in the number of meetings they will organize per client, the overall average declines by almost 17%.

FACILITY CHOICES AND RATES

City hotels are the most frequent venue choice for all planner categories—particularly in Canada, where planners expect to use them for 50% of their meetings. Interest in resort hotels is driven primarily by corporate and independent planners, predominantly in the United States. Conference centers and university settings are most likely to draw government-hosted events and are most popular in Europe, while convention centers will draw the largest share of their business from associations and independent planners.

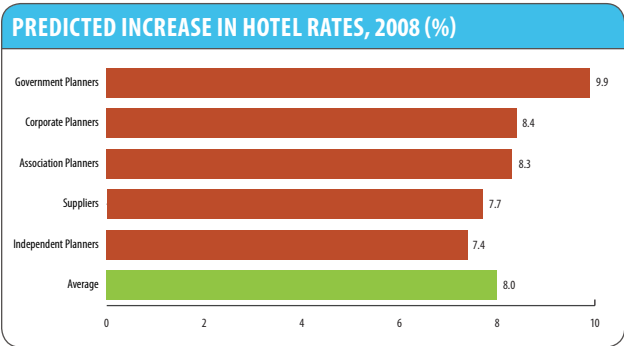
PLANNERS' PERCENTAGE OF MEETINGS BY FACILITY TYPE, 2008

	All	Corporate	Association	Government	Independent	US	Canada	Europe
City hotel	39.2	39.1	41.5	40.0	37.3	37.8	50.0	40.7
Resort hotel	26.1	29.4	20.4	8.8	28.3	28.5	19.2	11.5
Conference center/university	12.1	9.4	13.7	31.7	11.8	11.1	9.3	21.9
Convention center	11.5	8.9	14.9	4.5	12.1	10.7	11.9	18.1
Airport/suburban hotel	11.3	12.6	11.6	7.3	10.0	12.0	8.4	8.6
Restaurant/unique venue	10.3	11.0	8.4	9.0	11.5	10.0	9.2	14.3

- As a group, European planners show considerably more interest in conference centers and universities, convention centers and unique venues, but are less likely to bring their meetings to resorts. Interest in airport and suburban hotels is driven mainly by planners in the United States.

Beyond the general categories in the survey, planners identified a range of other venues where meetings take place, including art galleries, classrooms, city halls, cruise ships, private homes and in-house facilities.

Nearly two-thirds of **FutureWatch 2008** respondents anticipate that hotel rates will increase in 2008. About 22% expect rates to remain stable, while 0.7% predicts a decrease. Of those who see higher rates ahead, client-side planners tend to expect larger increases than suppliers and independent planners.



Across all planner categories, the most frequent practice in 2007 is to invite three properties to bid on the contract to host a meeting. However, more than one-quarter of planners and more than one-third of independents are already offering their events to 10 or more facilities, and larger offers will become increasingly common in 2008.

AVERAGE FACILITIES CONSIDERED PER MEETING (%)

	All		Corporate		Association		Independent	
	2007	2008	2007	2008	2007	2008	2007	2008
1	7.1	6.4	5.0	5.0	12.3	9.5	4.5	5.3
2	5.5	5.7	6.4	6.4	6.6	7.4	3.4	3.8
3	27.4	26.0	28.9	28.3	30.0	28.8	22.6	20.8
4-5	23.6	23.7	24.7	22.8	25.9	27.1	21.1	21.5
6-9	9.4	9.8	8.7	9.9	5.3	6.2	13.2	12.5
10+	27.1	28.5	26.3	27.7	19.8	21.0	35.0	36.3
Avg. Number	7.05	7.29	7.00	7.20	5.77	6.01	8.42	8.64
Change	3.4		2.9		4.2		2.6	

Independent planners have been busy as a result, suppliers even more so. Nearly six in 10 independents wrote as many as 30 proposals in 2007, while 61.6% of suppliers wrote 50 or more.

NUMBER OF PROPOSALS PERSONALLY PREPARED, 2007 (%)

	All	Suppliers	Independents
None	8.7	9.0	7.8
1-9	15.3	10.5	27.9
10-19	9.7	7.1	16.8
20-29	8.0	5.8	14.0
30-39	4.3	3.4	6.7
40-49	2.6	2.8	2.2
50-99	14.1	13.2	16.2
100-199	14.5	18.2	5.0
200-499	14.5	19.7	1.1
500+	8.2	10.5	2.2
Avg. Number	162.93	206.10	50.08

The volume of proposal-writing may be explained in part by the proportion of planners who turn to outsourced facilities and services for even the smallest meetings. More than two-thirds of planners seek offsite facilities for meetings of up to 50 people. Just over 50% look for outsourced services for meetings of the same size.

MINIMUM MEETING SIZE TAKEN OFF-SITE (%)

	All	Corporate	Association	Independent	Suppliers
1-10	25.1	12.2	18.9	23.8	34.2
11-50	43.6	53.6	50.2	52.8	33.6
51-100	16.7	19.8	18.9	12.8	15.6
100+	14.7	14.3	11.9	10.6	16.7

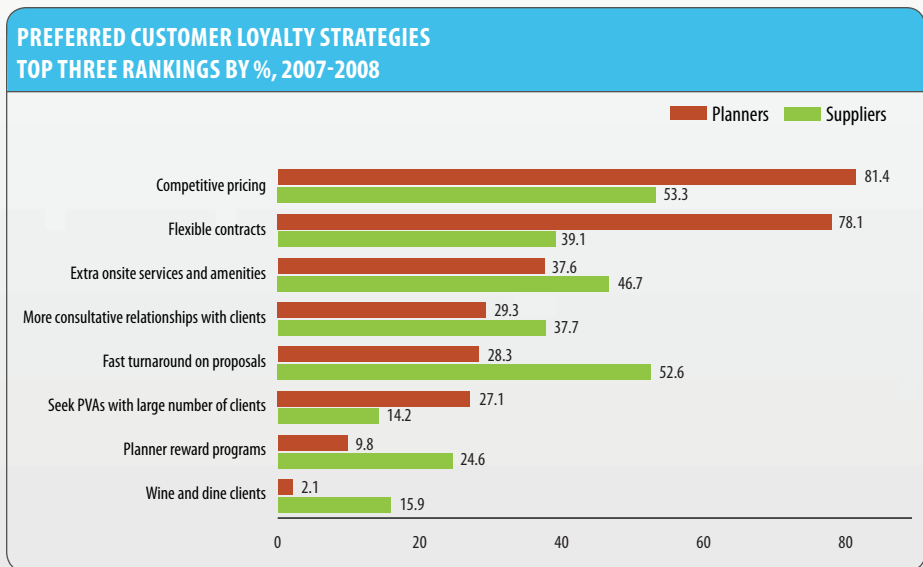
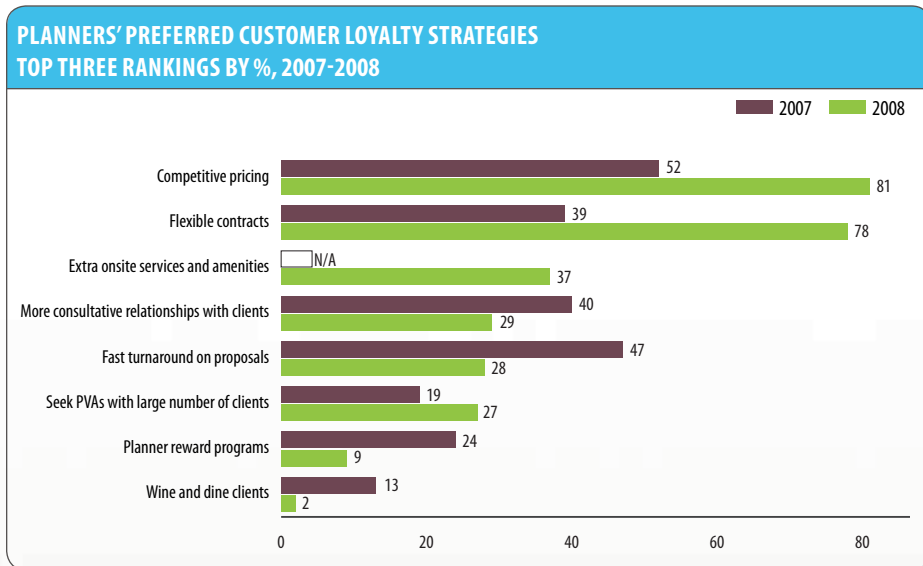
MINIMUM MEETING SIZE TO OUTSOURCE SERVICES (%)

	All	Corporate	Association	Independent	Suppliers
1-10	23.3	13.4	18.9	21.1	30.6
11-50	32.4	36.2	32.9	41.5	27.3
51-100	17.7	19.5	19.3	17.4	16.3
100+	26.6	30.9	28.8	20.0	25.8

BUILDING THE RELATIONSHIP

FutureWatch 2008 revealed some gaps between suppliers' strategies to build customer loyalty and the offers that are most important to planners. . . partly because planners' interests and priorities have changed over the last 12 months. Contrary to their responses to **FutureWatch 2007**, planners are now much more interested in competitive pricing, flexible contracts and preferred vendor agreements with key suppliers, less concerned with fast turnaround on proposals, and considerably less amenable to personal reward programs and hospitality.

The result is that many suppliers appear to be scrambling to keep up with planners' expectations.



- While four out of five planners now place a premium on competitive pricing, only 52% of suppliers set out to offer it.
- Although four in 10 suppliers are prepared to offer flexible contracts, twice as many planners would like to see them.
- Though more than half of suppliers are trying to fast-track their client proposals, only one-quarter of planners see turnaround as a priority.
- About one in four planners are prepared to consider preferred vendor agreements with their suppliers, but only half as many suppliers are thinking along similar lines.
- The era of winning business through personal rewards and hospitality is clearly drawing to a close. While one-quarter of suppliers still offer planner reward programs, only one in 10 planners are expressing serious interest. And for the 16% of suppliers who are ready to wine and dine their clients, the guest list is becoming sparse: only one in 50 planners cited hospitality as a preferred customer loyalty strategy.

Planners suggested that suppliers could position themselves more effectively by delivering outstanding service, working through national and global sales offices, responding precisely to RFP requirements, offering free Internet at meeting facilities and forming partnerships to "create actual relationships, not just schmoozing." One planner said vendors should join MPI and become active in their local chapters to build business relationships.

Suppliers said their relationship strategies included better knowledge of client needs, more frequent contact and effective use of technology.

ABOUT *FUTUREWATCH2008*

A record 1,643 meeting professionals took part in ***FutureWatch 2008***, the sixth in an annual survey of meetings industry trends and issues produced by Meeting Professionals International and American Express.

- The survey group consisted of 732 suppliers (44.6%), 343 corporate meeting planners (20.9%), 265 independent planners (16.1%) and 243 association planners (14.8%), as well as 25 government planners, 22 students, 11 faculty and two lifetime or honorary members.
- The survey drew 1,285 respondents (78.2%) from the United States, 199 (12.1%) from Europe, 145 (8.8%) from Canada and 14 from other countries.
- Almost three-quarters of respondents (1,211, or 73.7%) said their jobs involved some form of meeting or event planning. Nearly two-thirds (1,016, or 61.8%) held management responsibilities, 892 (54.3%) worked in sales, 682 (41.5%) had administrative duties and 658 (40%) were in operations.
- Suppliers and independent planners accounted for 94.4% of all the business owners, 88.9% of the presidents and CEOs, 77.8% of the vice presidents and 66.5% of the directors in the survey group. 55.8% of the senior planners and 46.6% of the professional planners, but only 30.5% of the managers, identified themselves as corporate planners.
- A total of 99 respondents, including 41 suppliers and 32 independent planners, said they were currently teaching meeting or event courses at the college level.
- ***FutureWatch 2008*** respondents were spread fairly evenly among organizations of all sizes, from sole owners to companies with more than 10,000 employees. The majority of solo practitioners and very small businesses, with 10 or fewer employees, were either independent planners or consultants. Employees of the largest organizations were mainly facility representatives or corporate planners.
- Nearly 60% of respondents (980) worked for organizations with permanent operations in only one country. But nearly one-quarter (389), mainly corporate planners and suppliers, reported staff or facilities in six or more countries. Europeans were almost twice as likely as their North American counterparts to work for organizations with six or more countries of operation.





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ABOUT MPI

Meeting Professionals International, the global community for meeting and event professionals, provides innovative educational programs, creates rich connections and beneficial marketplace opportunities for its nearly 23,000 members. Founded in 1972, it has 68 chapters in 20 countries, with offices in Dallas, Luxembourg, Canada, and Singapore. For more information, please visit www.mpiweb.org.

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