IACC

Exceptional meetings. Powerful connections.

RESEARCH PROJECT TEAM

CHAIR:

Ellen Sinclair, Benchmark Hospitality International

VOLUNTEERS:

Paul Dolce, Dolce Hotels and Resorts
Jeu Bressers, Kapellerput Conference Hotel
Cedric Fasbender, Benchmark Hospitality International
Jeff Loether, Electro Media Design Ltd
Corbin Ball, Corbin Ball Associates
Jessie States & Marj Atkinson, Meeting Professionals International
Christopher Kelly, Convene Conference Centers
Marie-Claire Andrews, ShowGizmo
Adam Lanteigne & Anthony Kinney, Microsoft
Peter Komornik, Sli.Do
Dianne Devitt, The DND Experience Group
Joe Santo, PSAV
Terry Bickham, Deloitte
Valerie Hausman, Duke University
Robyn Domber, Development Counsellors International (DCI)
Andrew Moffett, Marriott International
Creston Woods, Deloitte University

This report brings together insights from global meeting planners, IACC members and industry experts at a time when the meetings industry is transitioning at a rapid pace. As the meetings, conference and training landscape continues to evolve and expand, meeting planners must continually evaluate all elements of the meeting experience in order to ensure they are providing the most relevant environments to foster collaboration, ideas exchange and relationship building among attendees.

While the overall objectives and goals of meetings have generally remained constant, there are clear indicators that the adoption and use of technology, the physical design of meeting and networking spaces and the emphasis on "experience creation" will be increasingly important. Compounding the pressure on meeting planners to adopt and incorporate these tangible meeting elements is the increased requirement to demonstrate the value of meetings to their leadership, peers or clients while often operating in an environment of reduced budgets. It is critical for meeting venues to respond accordingly and provide those elements that are increasingly sought after and can positively impact the overall meeting objectives.

Knowing current expectations among meeting planners as well as how these expectations are projected to change moving forward will allow venues to thrive in a competitive environment. Using data obtained through a detailed survey of more than 150 meeting planners from 5 continents, quantitative cross-sectional information using geography and generational divides has been developed to identify and deliver key trends on what will be required in meeting rooms of the future and to help venues respond to the following questions:

"With the improvement of the economy, companies, though still cautious, are willing to spend more on meetings. Additionally, they want to be trend setters or be with the trends, to keep up with the speed of the world…"

How have the objectives and goals of meetings changed over time?

Is "experience creation" going to be more important when planning meetings in the future?

What are the ideal physical aspects of meeting space and how have they changed over time?

What will be the most critical technology needs over the next three to five years?

The meeting planners surveyed managed corporate, association and government meetings and 52% of respondents dedicated more than 75% of their working time to meetings management, whilst 37% spent less than 49% of their time organising meetings. Looking at meeting planners by age group, it is seen that a slightly higher percentage of millennials spend less than 49% of their time organising meetings versus the other generational cohorts.

This summary will support meeting venues operating in a time of rapid change by offering insights into the challenges and future needs of buyers and delegates.

MEETINGS NOW AND IN THE FUTURE

Meeting planners are cognisant of the impact of meeting venues on delegates' productivity, creativity and ability to respond to new ideas and thinking. Currently, flexibility of meeting space, access to interactive technology and the availability of networking spaces are top considerations, in that order, when determining if a venue will provide the most productive and inspiring venues for delegates. As the research uncovered, this is true regardless of the age and in general, the geographic location of the planner indicating that generational divides are not as deep as people think. Everyone enjoys a great experience and purpose driven work regardless of their age.

However, the importance of select venue elements is expected to change slightly and as meeting planners look to the future, it's clear that their decision making process is largely based on their observations on changes within the industry over the past several years.

- 75% of responding meeting planners report that their current role involves more "experience creation" versus two to five years ago. Before cell phones and WiFi meeting participants had no choice but to sit down and engage with the content. But now conference organizers and speakers are in a non-stop battle for attention against all of the content, entertainment options and social media on the internet. Power has shifted to the participants such that venues and hosts have to deliver experience.
- Over 77% of respondents report that access to interactive technologies such as tools to encourage audience participation, collaborative communication platforms and others, are more important now than they were five years ago.
- 47% report the importance of flexible meeting space now versus its importance in the past.

Using these indicators as a road map for future trends, meeting planners predict an increased emphasis on, and need for, select venue elements. In particular, planners expect the access to interactive technology to become more important than the current top priority when considering venues, the flexibility of space and set ups.

Figure 1. What Meeting Venue Elements Will Be Most Important Looking Toward the Next Five Years?

Previously it was all about the content, today it is about the networking and collaboration."
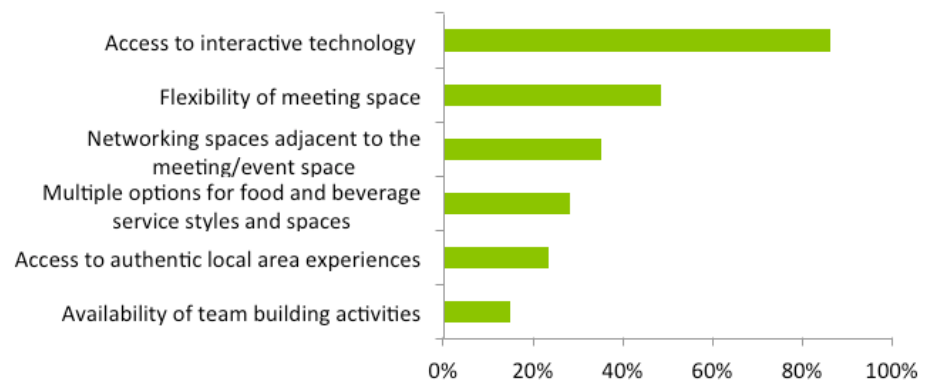
Additionally, when asked to look two to five years in the future, respondents are in agreement that while the overall goals and objectives of meetings are not likely to radically change, meetings, and meeting venues, will be required to adapt in a variety of ways to foster enhanced communication, idea generation and overall positive experience of the delegates.

Of particular importance, meeting planners believe "experience creation" will continue to gain importance over the next several years as well as a greater emphasis on delegate productivity, relationship and community building. If participants are not posting to Instagram at your conference then you failing to satisfy their expectation for what it means to deliver an experience. The latter two directly reflect meeting planner views that there will be an increasing emphasis on providing a definitive return on investment around training, meetings and conferences and justifying the expense of these events to key decision makers. A key question moving forward will be how planners and venues can work together to create these desired experiences.

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Many new hires are millennials so the programs need to be a bit more creative while still staying within budget"

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I believe that going to live meetings needs to be an experience instead of a need. Anyone can go on the internet and obtain what they need but they cannot experience what they get live. Camaraderie, person to person contact, etc"

While planners know the venues they select will largely impact the goal of enhanced "experience" creation, planners are largely satisfied with their roles and responsibilities and are not looking to outsource select conference elements (i.e., venue sourcing, housing, production, registration, post-event feedback etc.) to the meeting venue. Of the 23% of respondents who did say there were meeting and conference elements that they are currently responsible for but would prefer to have the venue manage, registration (participant and on-site) was the top task they would outsource. This may be influenced by the desire on the part of the planner to retain responsibilities, protect their role and justify their cost until that role expands beyond the ability for one individual to manage. Gen X'ers (26%) are the most likely to consider outsourcing their tasks and baby boomers (20%) are the least likely to outsource those elements that they currently manage, to the venue.

These findings confirmed to the research team that the overall environment provided by the meeting venue and rooms must be considered first and foremost even before other considerations such as cost or brand loyalty. Given the influence meeting spaces have on creativity and inspiration, meeting venues will be required to work with planners in a consultative capacity to foster the most unique meeting experiences.

Millennials find value in conferences and meetings, even though many don't engage them properly. The Center for Exhibition Industry Research found that 61% of millennials believe they are more valuable today than they were two years ago. They feel this way because they are seeking networking and career opportunities more than ever before. Millennials are searching for rewarding jobs, so they view conferences as a way to connect with great organisations face-to-face.

Primarily due to the changing demographics of attendees, with millennials preferring "experiences" over 'meetings", it is worth noting that within 10 years they will make up 70% of the workforce.

PHYSICAL MEETING SPACES AND DESIGN

Fundamentally, there are elements of meeting venues that are critical for successful meetings which have largely remained constant over the past 5 years. These same elements are projected to remain important in the years to come including high quality broadband (but with constantly improving quality and speed expectations), good acoustics and good variable lighting as seen in Figure 2. Broadband and technology in general have moved from being nice-to-have features to being foundational resources that are more important and expected than food and drink.

Figure 2. Degree to Which Respondents Agree with the Following Statements (on a scale of 1 (strongly disagree) to 10 (strongly agree))
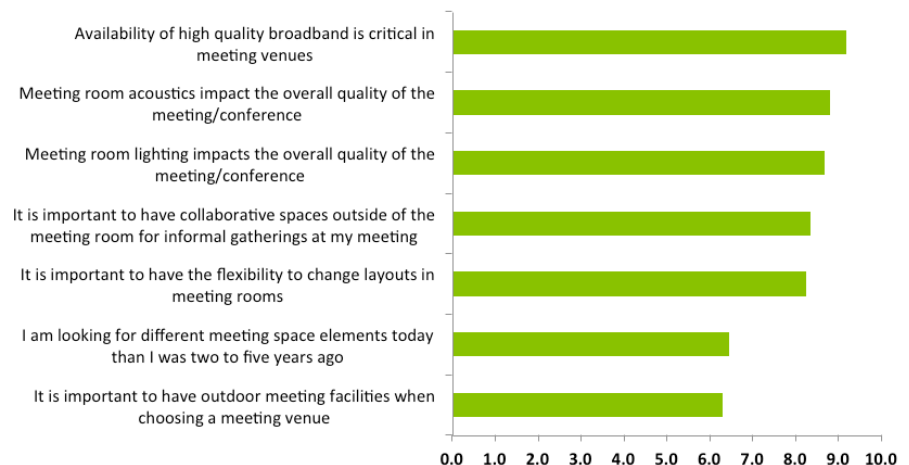
In general, meeting planners do cite a continued trend towards more unique, and flexible meeting spaces. When asked how strongly they agree with the statement "Access to collaborative meeting space will become more important in the next two to five years" (on a scale of 1 -strongly disagree to 10 -strongly agree), meeting planners provided an average rating of "8" indicating the need for more creative, less traditional options.

The fact that broadband is considered the top physical aspect needed at a meeting venue is telling. Venues need to insure that the investment put towards upgrading this element is directly proportional to the value placed on it among planners and delegates.

Jeu Bressers, Kapellerput Conference Venue, Eindhoven provided the research team with this observation; "Meetings in the future, will become even more about the creation of experiences. Delegates will remember that meeting and it will have a bigger effect on them. I am focused on creating meeting environments that are more like a home at the moment, but just one style of meeting which will not suit all. Consider creating different meeting environments. Maybe a room with a kitchen table, a meeting space that addresses all senses. Planners are either not aware of these types of meeting venues that are available today and this is holding back the move into more stimulating meeting environments."

When asked to describe the physical characteristics of an ideal meeting venue, common themes included availability of natural light, flexible space that can be adapted to be used in a variety of ways, and space that offers the latest technology. Representative descriptions include:

• "Flexible space, with accessible indoor and outdoor locations - or the ability to bring the outdoors in.   Flexible technology - which supports video, skype and hybrid meetings."

• "A room that can be configured in many different aspects (visually, audibly, physically). Seating needs to be comfortable and the environment controllable."

• "Urban location with access to creative outdoor spaces, integrated technology in the meeting rooms, option of rooms with lots of natural light, but also ability to block out daylight, walkability to local restaurants and attractions."

There is a desire for meeting rooms to be configured in many different ways (audibly, visually and physically). A need to offer different styles of seating, that will add interest to the overall meeting experience, including more informal and no more banquet chairs in meetings. One survey participant commented that their dream is to find a venue that will get them out of a rut and
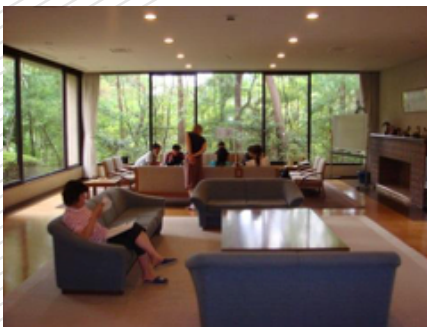
inspire their delegates to keep attending and keep moving themselves and the organisation forward. It is no surprise to hear that clean, modern, well lit spaces with quality AV remains important.

Planners were also presented with a series of meeting room images and asked in what type of room they would most likely hold a meeting.

While outdoor space and moveable furniture groups are important, planners were more likely to choose spaces that offered clear views of all delegates such as in the first image and this was consistent across age divisions.

Terry Bickham – Director Federal, Global, and Industry Development, Deloitte Services LP *"How space is used is of interest to me. There is a shift away from presentation style. Our focus is less around the plenary and more around the breakouts; a more immersive experiential program, versus just a smaller venue for a smaller presentation. Outside of the meeting room, now we are seeing the modern learner is less about what they are doing in the meeting room and more about what they are doing outside in the coffee break areas, corridors etc. and creating more spaces for these. Discovery of content is more important than dissemination of content - pull versus push. The facility/venue has to be structured and laid out to facilitate this type of learning."*

Venues can create a barrier to planners being able to experiment with meeting layout and design, when they charge additional room hire for the use of space, over the delegate package charged. This can reduce options and add to the overall meeting cost.

A number of those surveyed and other contributors to the research report that the traditional lecture model is gone, even in education focused meetings and conferences. Attendees want to be immersed in the experience.

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Valerie Hausman, Associate Dean, Global Executive Education, Duke University's Fuqua School of Business *"We are moving our learning environments away from tiered auditoriums into flexible flat floored meeting rooms. My needs in terms of venue style and features is changing and past venue models are not how we would like them to be in future. 5-star service and F&B experiences are important. The quality of the venue in terms of design, art and furnishings needs to be higher in the future, over the whole property. Break out and team rooms are important, but the gathering spaces are vital too."*

BREAKS & MEALS

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"We need to feed attendees in a productive manner. During meal time & breaks is when they 'check in' with the office and family. We need to allow options for technology charging, WiFi service and other ways to help them accomplish this during meal times - we don't want them to miss part of the meeting to go back to their rooms to accomplish this because a meal service was too long, or the A/V did not support their needs. Breaks need to be at their own time - provide break refreshments of healthy choices throughout the day so that can have it when they need - not when we tell them to."

There was a high degree of importance placed on the refreshment breaks and meals, on how they impact delegates and facilitate networking and building of relationships. Every item on Convene's menu is portioned so that it can be enjoyed without a knife, freeing participants up to stand up and mingle as opposed to being confined to a single seat. Terry Bickham, Deloitte Learning commented "we used to organise break times at venues which provided areas exclusive to our group and today it is the complete opposite. We recognise that there is a lot to be gained from the connections people make outside of the meeting room, inside and outside of their immediate group."

Continuous refreshment break stations remain the preferred solution, with fewer options, but healthier snacks. Meeting planners incorporate more breaks into there programs, with preferences towards venues which can offer breaks outdoors, with fresh air and sunshine, which can lift delegates sprits and increase wellbeing.

I think that the "break" experience of "coffee and snacks" is tired and over-utilized. An interactive "break" that merges refreshments with teambuilding will be a much more effective way to revive your attendee's senses and reconnect their engagement. I also think "mealtimes" can benefit similarly. Not every meal, every time.. but certainly as a new option on the landscape of breaks and mealtimes."

COMMUNICATIONS & CONNECTIONS

While meeting planners have numerous wish list items for their ideal meeting venue, there is no mistaking the critical importance and dominance of technology when selecting a venue. Responding meeting planners report that an increasing percentage of budgets are devoted to securing and implementing new technologies such as event apps, beacon technology to track traffic and attendance and video conferencing capabilities and the reliance on technology is only expected to increase in the next two to five years. Peter Komornik, CEO of Sli.Do states "This research makes a compelling case for audience enabling technology, both mentioned explicitly as well as implicitly by referring to good Wifi for attendees. Developments in WiFi infrastructure and improved reliability will be a driving force in meeting space design."

Not surprisingly, a number of technologies have been implemented in the recent past and 81% of respondents report they have introduced new technologies in their meetings that encourage communication between hosts and delegates.

*Figure 4. Meeting Technologies Implemented in the Past Five Years*
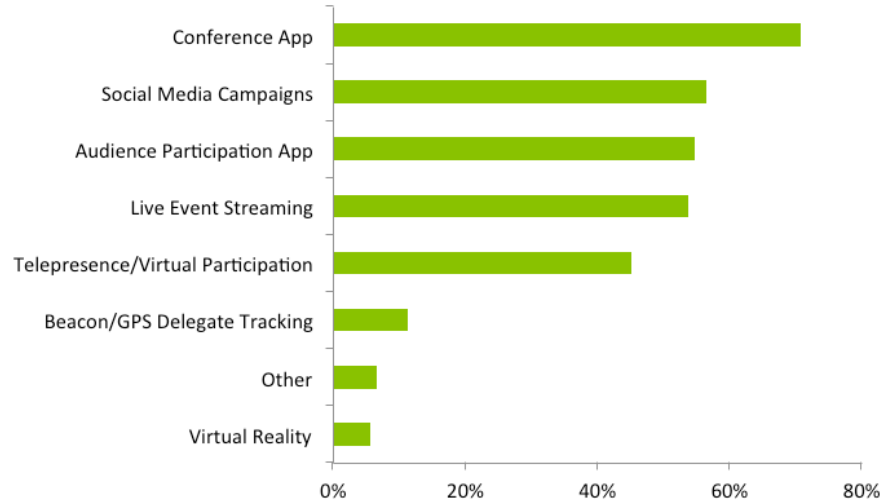
> " Access to strong, fast, secure broadband should be a given at all meetings and should be provided free by the venue. It still boggles me that some venues charge a premium for using WiFi. When this becomes the norm we'll be able to use other technologies without barriers..."

As can be seen in Figure 4, the top three technologies implemented at meetings in the past five years are conference apps, social media campaigns and audience participation apps. In terms of demographic differences, Gen X'ers were the most likely to implement new technologies with 82% of this demographic reporting the introduction of these technologies into their events. Jeff Loether, MD of Electro-Media Design notes *"The best investment for venues is in infrastructure to handle any flavour of interactive technologies requested by event planners."*

With the use of new technologies also comes new concerns and security of data will become increasingly important. When asked how much they agree or disagree on a scale from 1 (strongly disagree) to 10 (strongly agree) with various statements around technology, respondents provided an average rating of "8.2" when presented with the statement "Security of my data will become increasingly important in the next two to five years".

In order to support the use of these technologies, and others, broadband will become increasingly important. Now and well into the future, meeting planners will expect venues to have enough bandwidth to accommodate all of their and their delegates technological needs.

Figure 5. Importance of Broadband at Meeting Venues for Tasks in the Next Five Years
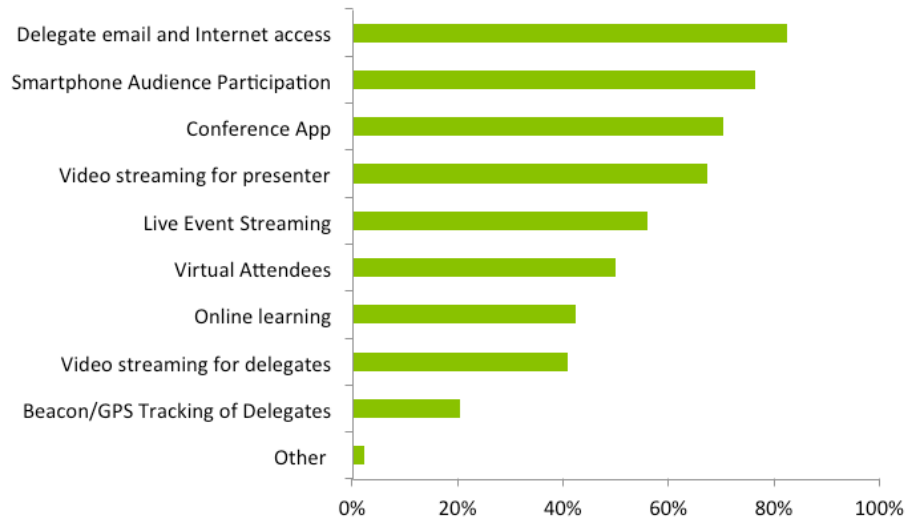
Adam Lanteigne, Global Microsoft Device Marketing at Microsoft further highlights *"A particular interest of ours is in large screen experiences, how to unlock the power of the group. Though our partnership with IACC and this research, we are focused on creating the least friction in meetings through the grouping of collaborative technologies for group work. Research will enable us to gain a better understanding of how to create the connections between in-room and remote users, such as human hand gestures."*

Figure 6. Importance of Natural Daylight versus a Clearer View of Screen
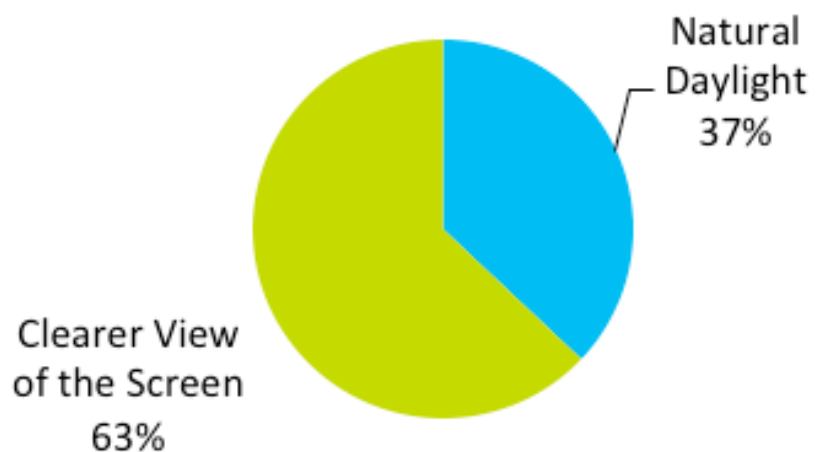
Only a small number of respondents felt Virtual Reality would play an increasing part in their meetings delivery in the next two to five years. Very few people have experienced the utility of virtual reality first-hand but what once you have seen it you can't help but believe that it will inevitably become part of our everyday lives just as iPhones are today. Corbin Ball of Corbin Ball Associates comments, "this is not surprising given this is only just emerging as an affordable addition to meetings. However, it is worth looking again 12 months down the line, to see if this starts to become more common-place."

Ellen Sinclair, Senior Vice President, Benchmark Hospitality International raises a question for the future *"Great technology alone is not enough. Being comfortable with technology and making it simple and easy to use is key. How can we help to support that individual be a better moderator using collaborative technologies?."*

ORGANISATIONAL CULTURE AND THE EFFECT ON MEETINGS

Meeting Planners will likely need to be more aware of sourcing meeting venue and environment that will best match their organisations culture. In research conducted by Haworth (Collaborative Spaces Whitepaper 11.11); Haworth highlights the link between organisational culture and the primary reasons for meeting and how they differ. Organisational culture is the sum of the values, leadership styles, procedures, goals, and many other characteristics that make an organisation unique and the research defined 4 cultures; Collaborative, Create, Control and Compete.

Social scientists have identified a variety of reasons for meeting (McGrath, 1984; Roman & Nunamaker, 2001), but generally speaking, they can be distilled into four categories (Mittleman, 2009), Socialising, Tactical Execution, Strategic and Presentations. All four organisational cultures need spaces that support all four meeting types. But the number, size, and arrangement of spaces required by a particular group will depend on the tasks they have to accomplish.

MATCHING COLLABORATION AND MEETING NEEDS TO CULTURES

COLLABORATIVE CULTURE

Primary Meeting Preferences: Social.
Secondary Preferences (in descending order): Strategic Thinking, Tactical Execution, Presentations.

A collaborative culture requires Impromptu spaces to sit and connect throughout the building encourage short conversations and idea sharing. Where possible, soft seating and an element of residential design can be incorporated. Flexibility in multipurpose spaces requires furniture that allows them to be arranged to suit a variety of activities.

CREATE CULTURE

Primary Meeting Preferences: Strategic Thinking.
Secondary Preferences (in descending order): Social, Presentations, Tactical Execution.

A create culture may require greater flexibility and access to technology, and a whimsical, social aesthetic may inspire ingenuity. Meeting spaces should allow meeting participants to see each other and people should have control over how far apart they sit. The space should allow for frequent movement and sit-to-stand action. The seating should comfortable to encourage relaxing and staying, as well as allow space to stand or change position easily. No barriers between people, unless they need horizontal surfaces for writing or references. Good visual acoustic shielding from the outside will limit distractions.

CONTROL CULTURE

Primary Meeting Preferences: Presentations.
Secondary Preferences (in descending order): Tactical Execution, Strategic Thinking, Social.

A laptop-sized surface for each attendee may be sufficient, as they are unlikely to require additional reference materials. Lightweight, comfortable, readily moveable chairs (perhaps on wheels), can maximise a relatively small footprint and be arranged in multiple configurations. Walls can be used for projection, writing, or pinning up information in areas visible to everyone.

COMPETE CULTURE
Primary Meeting Preferences: Tactical Execution.
Secondary Preferences (in descending order): Presentations, Strategic Thinking, Social.
Venues offering casters on tables and chairs can let members break into small groups. Ample writing and display areas, as well as surfaces for laying things out, support the need for visual cues and reference materials. Tables should be power and internet enabled. Seating should allow all participants to see one another.

This particular research summarizes by saying that when meeting spaces are designed with an understanding of organisational culture and collaboration styles, group spaces can improve the way people work together.

The data contained in this report identifies some of the prominent trends seen among meeting planners particularly in regard to physical meeting space and the use of technology as well as the buyers need to create memorable and effective meetings and events. The IACC Meeting Room of the Future long term goal is to identify and track changes annually and help IACC member venues, their customers and the supplier community develop venues and develop meetings to achieve more successful outcomes. Future research will include research and surveying of IACC venue operators and suppliers.

CONCLUSIONS – WHAT THIS MEANS FOR MEETINGS VENUES

Recent years has been marked by considerable change in the meetings industry in terms of the spaces people want to meet and run conferences and events in. This report highlights a significant awareness across a wide range of stakeholders, to the increased need for delegates to collaborate more and for the delivery of meetings and incorporation of collaborative technologies, to support this change. The focus for venues when considering this need, should not be on the meeting room alone, but on the spaces outside of the meeting room, for networking, socialising and dining.

Given a number of factors including the rapid advance of technology, more emphasis on unique meeting experiences coupled with company mandates to do less with more, meeting venues must be prepared to rapidly adapt to new and changing needs on the part of buyers and delegates.

Well designed, dedicated meetings focused spaces are essential, but the more specialised the spaces and technology, the more specialist the venue staff will need to be support these spaces. Survey respondents referred to meetings needing to be well supported by knowledgeable staff and for the venue team to be available to assist with the planning and hosting, as well as providing instant technology support for this more complex aspect of the meeting. Chris Kelly, Co-founder of Convene Conference Centres comments *"For venue operators like me to invest in better technology, establishing technology best practices would be helpful. The industry and IACC can help operators consider future compatibility."*

Meeting planners will need to be aware of which meeting environment will best match their organisations culture. They will need to have a good knowledge of venues that offer this environment, but also the specialist staff support to help create a memorable meetings experience.

If venues are not responding now to these changes, they risk being left behind. Creating meeting spaces that inspire people and encourage communication is important, whilst at the same time considering that how dining can play a key part in a meeting providing the time for relationship building and networking.

Meeting faculty and delegates are comfortable with technology, but technology providers should be aware to fact that it must be easy to integrate into the meeting and use. As virtual Reality becomes more common-place and affordable, expect it to play an increasing part in meetings and conferences.

The IACC Vision: IACC is a community of passionate people and organisations delivering innovative and exceptional meeting experiences.

About IACC: Founded in 1981, IACC is a not-for-profit association dedicated to promoting understanding and awareness of the meetings venue industry and to giving member properties the tools necessary to provide an exceptional IACC meeting experience. Active members meet a set of stringent Quality Standards and agree to a Code of Ethics. Currently, the association includes approximately 400 members from the United States, Canada, Australia, Japan, China, Kenya, Nigeria, Denmark, Sweden, Belgium, France, Switzerland, Italy, Spain, England, Scotland, Ukraine, The Netherlands, Germany, Hungary and the Philippines.

For more information, visit the website at www.iacconline.org. "There are meetings and then there are IACC meetings."

IACC wishes to acknowledge the organisations (see left) who have contributed to the funding of the IACC Meeting Room of the Future (TM) initiative.