The Future of Business Meetings Industry Report

Then now next, 25 years of change and a future forecast

mccrindle

MELBOURNE Convention Bureau

Contents

Executive Summary

With many people choosing to meet online, and with a wealth of information accessible at one's fingertips, what role do conferences and meetings play in the next 25 years? Who are the attendees of the future, what are their expectations, and what can business events offer that cannot be found elsewhere?

People desire human interaction. A plethora of online meetings take place all over the world, however it has not disrupted the core desire of people to interact face to face. Four in five respondents (86%) believe that attendees will continue to place a strong importance on meeting face to face. Many experts expect the time for networking at meetings to increase, "content will become less information focused and more interaction focused, where people will get to know each other". Social interaction was identified by one expert as one of the three pillars to a successful conference.

Plenary sessions and interactive sessions are expected to increase in length. This reflects an increasing desire of attendees to move from passive to active participants in the event experience. "Audiences went from wanting passive experiences in which they were listeners, to wanting to be active participants; learning and applying what is being taught to them".

The event experience itself is evolving, with attendees desiring an immersive experience. Both industry experts and survey respondents (85%) believe that the destination experience is extremely or very important for promoting a conference/business event, and will continue to be in the future.

Industry experts also suggest that voluntourism will soon be incorporated into business events. This provides attendees an opportunity to experience the local culture and give back to the community as part of the meeting.

Customisation and personalisation are a growing expectation among attendees. In the future attendees will have "more ability to go and see exactly what they want to see, so instead of doing it in 4 days they are doing it in 2 days, but they have far more flexibility in what they want to go and see, so it's personalising the experience for each delegate".

Technological changes have been integral to the evolution of the conference and will continue to be an essential tool for the future of the business events industry. It will be integrated into every aspect of the event, enabling customisation of the program for the delegate, facilitation of active participation, enhancing interactivity of presentations, and the opening of a whole new world of exhibition halls.

To facilitate this interactive and technologically advanced meeting, venue architecture is required to adapt. Experts expect meeting spaces to become increasingly flexible, purpose-built for connection and networking, with break out spaces to encourage active participation and collaboration.

Research Objectives

To celebrate the 25-year anniversary of Asia-Pacific Incentives and Meetings Expo (AIME), Melbourne Convention Bureau commissioned McCrindle Research to conduct research into the mega trends affecting the future of meetings. The aim of the research is to understand how the global meetings industry is changing, through the influences of social trends, new technology, and changing attendee expectations.

Research Methodology

The *Future of Business Meetings Industry* report is the collation of qualitative data gained through 14 in-depth interviews with industry experts. Quantitative data was also collected through a survey launched to Melbourne Convention Bureau's contacts within the industry. The survey yielded 206 commenced responses, and 147 completed responses. The survey was in field from 15 December 2016 to 23 January 2017.

Throughout this report, in-depth interviewees are referred to as industry experts, whilst survey respondents are referred to as respondents. Where quotation marks are used in this report these are reflection quotes from industry experts. Insights from the levels of management was drawn from the breakdown of the question 'which of the following best describes your position'.

Throughout this report reference to the generations refer to the following age categories:

- Generation Y: 22-36 year olds (those born from 1980-1994)
- Generation X: 37-51 year olds (those born from 1965-1979)
- Baby Boomers: 52-70 year olds (those born from 1946-1964)
- Builders: 71+ (those born before 1946)

Attendees of the Future

Conference attendees are increasingly socially responsible, tech savvy, and time poor.

Industry experts suggest that there is a shift in conference attendees, from the traditional top tier executive, to a broader range of employees. "It used to be more the older established professors and scientists and the more senior people that used to get to go to the conferences". Companies are beginning to see the value in sending not only their top executives but also a wider range of their employees to be upskilled, networked and inspired.

Amongst some industry experts there was an initial fear that the meetings industry may experience a decline due to the rise of online meetings, however, many experts indicated that this only increased the value of meetings as providing a place for human connection. Four in five respondents (86%) believe, that in the future, attendees will continue to place a strong importance on face to face meetings.

As the younger generation of attendees begin to come through, they are increasingly "technologically savvy", bringing with them the expectation for technology to be integrated throughout the event. Industry experts suggest there is an emphasis for the future delegate on social responsibility, this is supported by survey respondents, with three in four (76%) respondents believing that attendees of the future will want events to be more socially responsible.

"As our younger generation starts attending more and more of these, they will definitely want to see environmental sustainability. They will definitely want to have involved in the format of the event, wellness programs and networking programs, it won't all be about learning there will be some kind of fun as well".

As attendees become increasingly time poor, it is likely they will attend less events. In saying this, when a decision has been made to invest their time into attending an event, their expectations on return for investment are significantly higher. Almost nine in ten (89%) respondents believe that attendees in the future will expect more learnings/acquired knowledge from events.
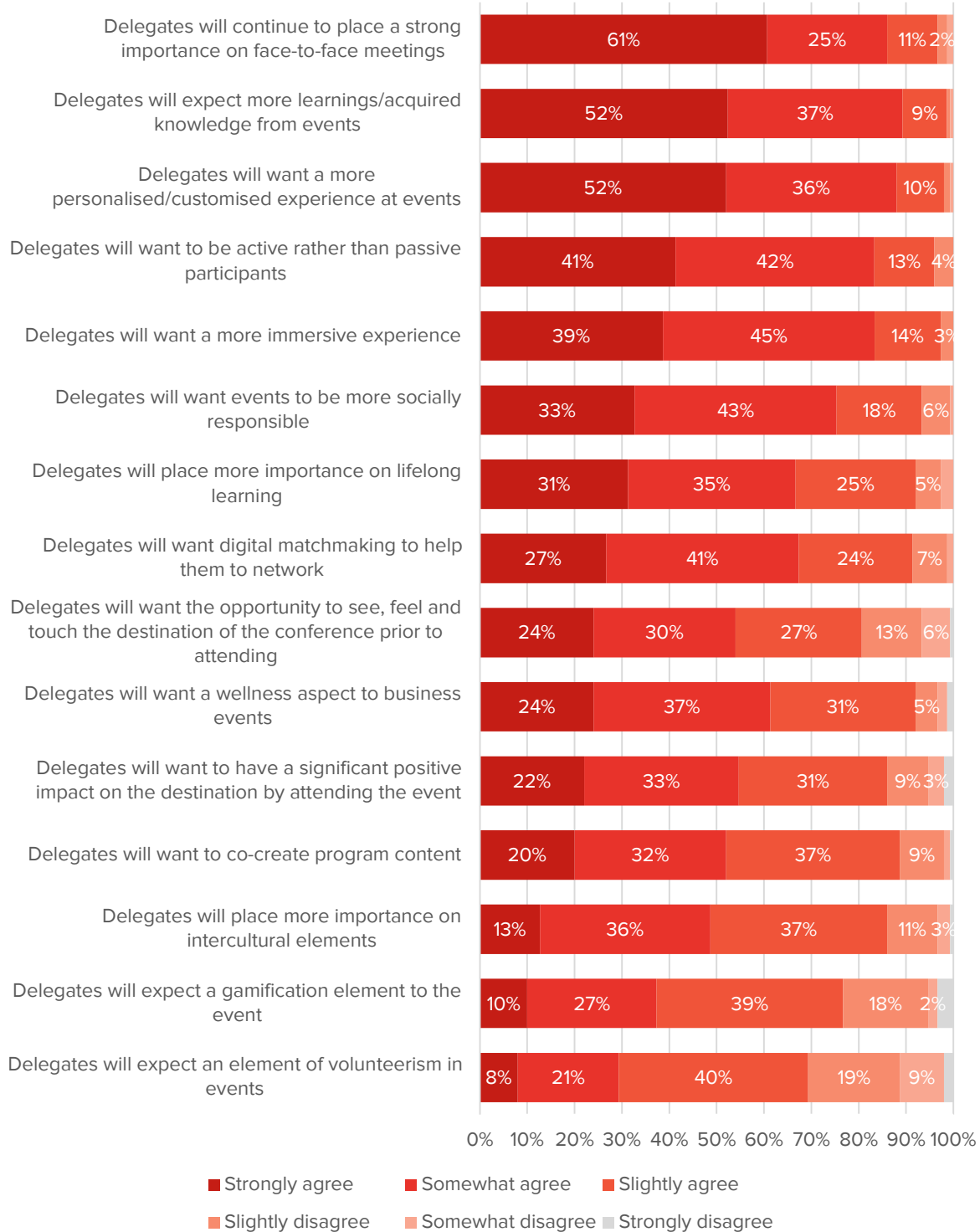
"What will be consistent is that future attendees will probably attend less events but will require more from the event that they do attend"
- Industry Expert

4

Q. Please indicate your level of agreement with the following statements regarding how the expectations of delegates will change in the future.
(n=149)

Statement	Strongly agree	Somewhat agree	Slightly agree	Slightly disagree	Somewhat disagree	Strongly disagree
Delegates will continue to place a strong importance on face-to-face meetings	61%	25%	11%	2%		
Delegates will expect more learnings/acquired knowledge from events	52%	37%	9%			
Delegates will want a more personalised/customised experience at events	52%	36%	10%			
Delegates will want to be active rather than passive participants	41%	42%	13%	4%		
Delegates will want a more immersive experience	39%	45%	14%	3%		
Delegates will want events to be more socially responsible	33%	43%	18%	6%		
Delegates will place more importance on lifelong learning	31%	35%	25%	5%		
Delegates will want digital matchmaking to help them to network	27%	41%	24%	7%		
Delegates will want the opportunity to see, feel and touch the destination of the conference prior to attending	24%	30%	27%	13%	6%	
Delegates will want a wellness aspect to business events	24%	37%	31%	5%		
Delegates will want to have a significant positive impact on the destination by attending the event	22%	33%	31%	9%	3%	
Delegates will want to co-create program content	20%	32%	37%	9%		
Delegates will place more importance on intercultural elements	13%	36%	37%	11%	3%	
Delegates will expect a gamification element to the event	10%	27%	39%	18%	2%	
Delegates will expect an element of volunteerism in events	8%	21%	40%	19%	9%	

Legend: ■ Strongly agree ■ Somewhat agree ■ Slightly agree ■ Slightly disagree ■ Somewhat disagree ■ Strongly disagree

Attendees are looking for collaboration and networking, not just information.

Industry experts suggest there is a shift in what attendees are looking for in future conferences. Attendees are no longer content to sit, listen and simply absorb information, they are looking for an opportunity to actively participate and collaborate.

Advances in technology increasingly allow this type of collaboration to take place. Interactive live polling has already been utilised in many meetings with great success at engaging the audience, "live polling I've seen a couple of times, that's really helped the audience engage more and so I'm expecting to see more of that in the future".

The opportunity to provide instant feedback is an area, experts suggest will develop in the coming years. "In the past, it has been just one way communication, the presenter presents a product or speech. I think now it has become more both way, easier for the attendees to give feedback to the speakers". This allows attendees to engage and interact with the speaker; instead of presentations simply being one-sided, they become a two-way interaction.

Interestingly survey respondents are divided in their preferences toward collaboration and sitting and listening. Two in five respondents (43%) indicated their preference is at least 60% sitting and listening, with a maximum of 40% collaboration, whilst almost the same proportion, 39%, indicated their preference was at least 60% participation and a maximum of

40% of their time spent sitting and listening. Generation Y survey respondents showed a preference for more interaction, with one in two (50%) indicating a desire for at least 60% participation (c.f. 36% Gen X, 32% Baby Boomers). Potentially indicating it will be increasingly important to know the audience.

In the next 15 years' respondents expect elements of business events to get shorter, particularly keynote presentations (42%), individual program length (35%), and overall conference length (57%).

Continuing this trend, the average plenary session time is also expected to decrease. 54% of respondents indicated that ten years ago the average time for a plenary session was between 65-91 minutes, whilst nowadays 87% indicated they are 25-64 minutes. In ten years' time, 27% of respondents expect the average plenary session to be 24 minutes or less.

Length of networking time is the only area of business events expected to increase, with three in five respondents (64%) indicating that it should be longer. CEO's are the most confident of this trend with three in four (74%) expecting networking time to increase (c.f. senior managers 65%, middle managers 58%, junior staff 63%). This corresponds to industry experts' expectations that networking time will increase, as human connection and interaction continues to rise in value.

"Most important to note is that audiences went from wanting passive experiences in which they were listeners, to wanting to be active participants, and learning and applying what is being taught to them"
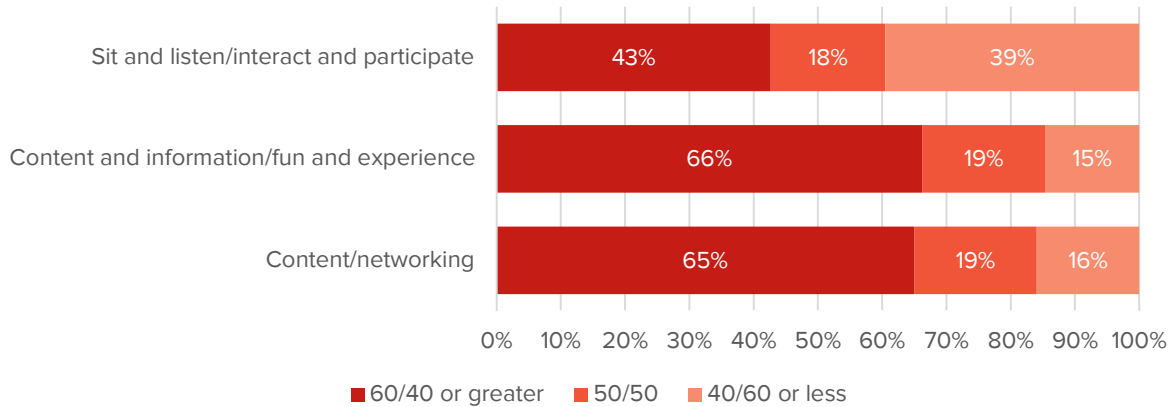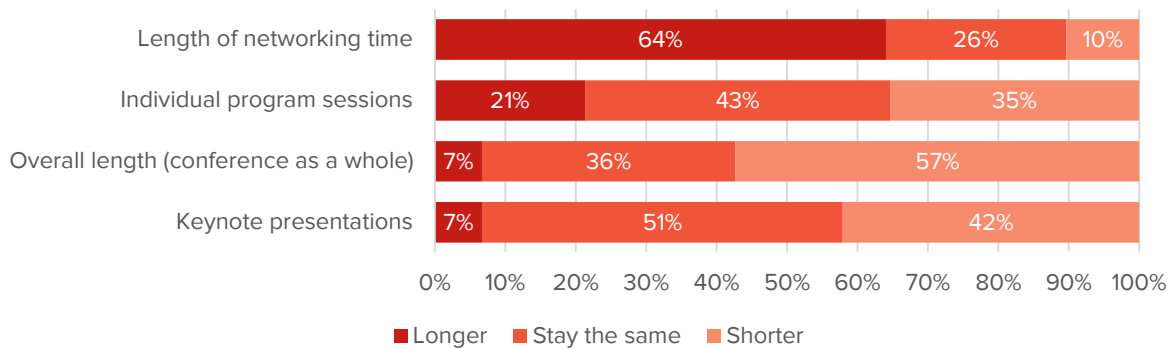
- Industry Expert

Q. For each of the following, please indicate your preferred ratio of these aspects of conferences.
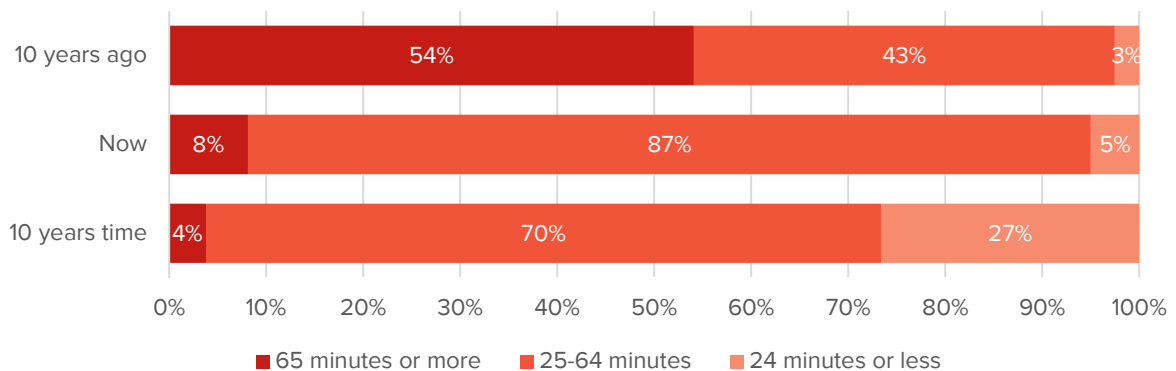*(n=157)*

	60/40 or greater	50/50	40/60 or less
Sit and listen/interact and participate	43%	18%	39%
Content and information/fun and experience	66%	19%	15%
Content/networking	65%	19%	16%

■ 60/40 or greater　■ 50/50　■ 40/60 or less

Q. How do you see the following aspects of business events changing over the next 15 years?
(n=164)

	Longer	Stay the same	Shorter
Length of networking time	64%	26%	10%
Individual program sessions	21%	43%	35%
Overall length (conference as a whole)	7%	36%	57%
Keynote presentations	7%	51%	42%

■ Longer　■ Stay the same　■ Shorter

Q. Thinking about plenary speakers for keynote sessions, what is the average length (in minutes), ten years ago, currently and would you predict in ten years time?
(n=158)

	65 minutes or more	25-64 minutes	24 minutes or less
10 years ago	54%	43%	3%
Now	8%	87%	5%
10 years time	4%	70%	27%

■ 65 minutes or more　■ 25-64 minutes　■ 24 minutes or less

Meetings provide a place for human interaction and experiential learning

As technology has advanced, enabling more meetings to take place in the online space, there has been concern among experts that the need for meetings may decrease. Once the initial concern passed however, many industry experts suggested that they expect the meetings industry to continue stronger than before, because of the desire for people to meet face to face. "Everything is so techy and virtual, conferences become all the more important because that face to face is lacking… the touch is not there, the eye contact is not there, the human connectivity is not there".

The social aspect of conferences was identified by one expert as one of the three pillars of a successful event, along with program content, and destination. Another expert suggested that "content will become less information focused and more interaction focused, where people will get to know each other".

Further to this, nine in ten respondents (91%) indicated that they at least somewhat agree that humans need to connect with each other and interact to learn. This will mean that conferences where people physically gather will always be in demand.

Along with human interaction, the demand for an attractive destination experience is on the rise among attendees. Industry experts suggest that the destination experience "would be the premium, and that's what each of the clients

are looking for", that "the MICE industry have to think of a different itinerary, different experience for all the attendees, it's not just the convention, it's the whole package".

As people are increasingly time poor, they are merging their conference experiences with a holiday. An attractive destination is increasingly a key to enticing delegates to attend events. Four in five respondents (85%) believe that the destination experience is extremely or very important for promoting a conference/business event in the future. Further to this senior management are the most likely to emphasise the extreme importance of the destination experience (59% c.f. middle management 40%, junior 36%, CEO 33%).

One expert said, "I do see an increased demand for more than just the convention centres; things to see and do in and around the event". Respondents agree, with three in four (76%) at least somewhat agreeing that creating a conference experience and ensuring fun is integrated throughout is not just 'nice to have', it is essential for conferences today.

As expectations around conferences and meetings change, the prognosis of the industry is still positive, with almost two in three respondents (63%) indicating they are extremely or very optimistic about the future of the events industry for the next 15 years.
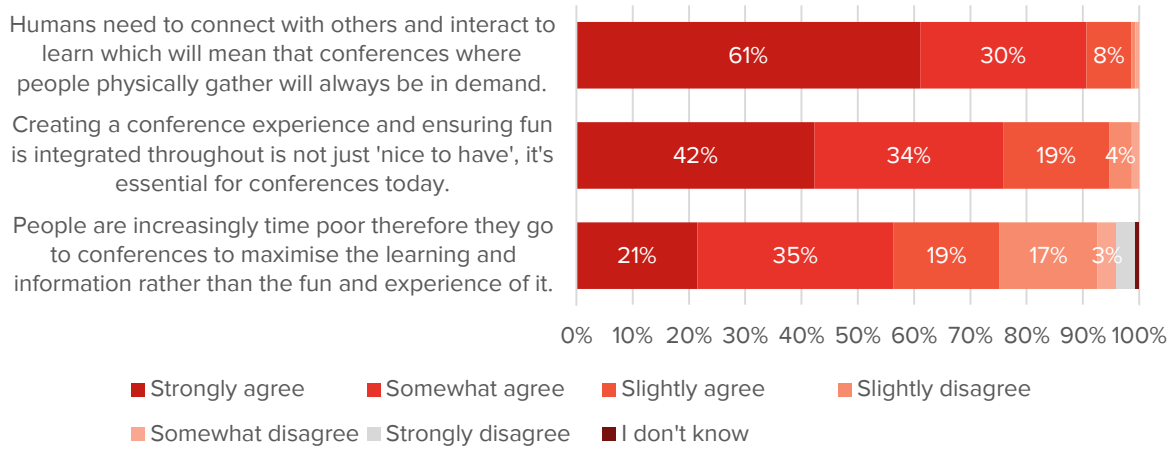
"the content will move away from information transfer, to more experiential based, which involves the interaction between people that they are getting less and less of in the workplace."
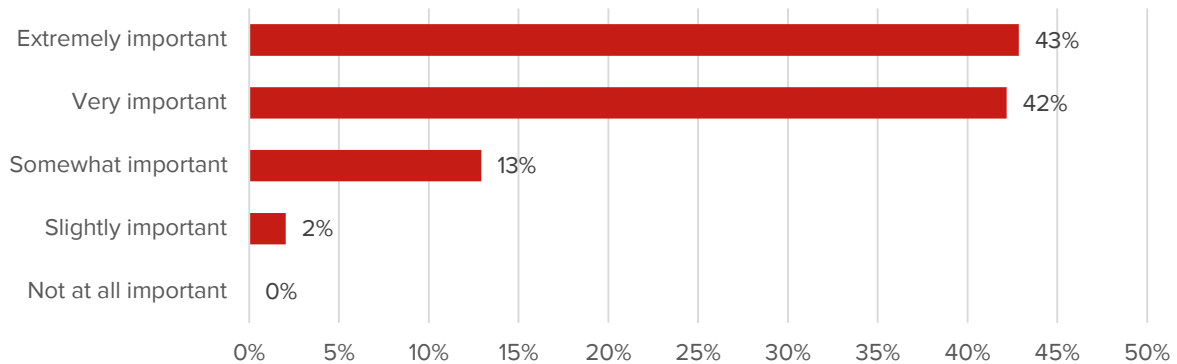
- Industry Expert

Q. Please indicate to what extent you agree or disagree with the following statements.
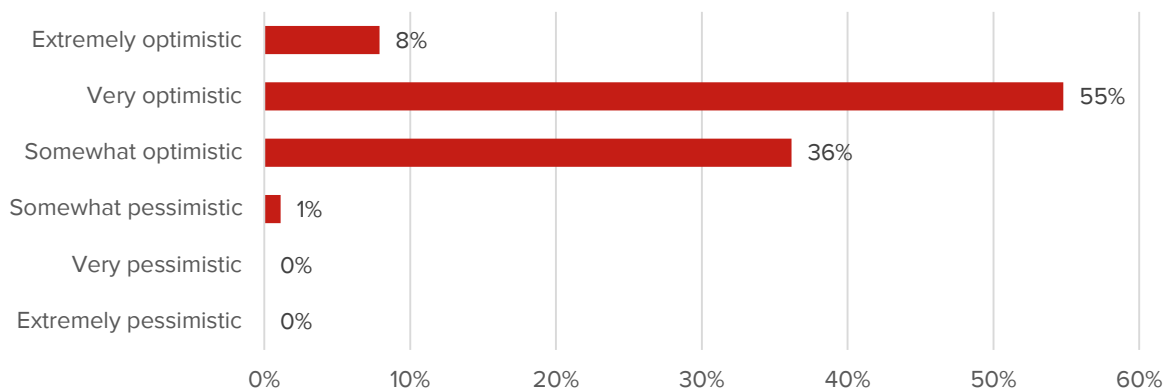*(n=149)*

Humans need to connect with others and interact to learn which will mean that conferences where people physically gather will always be in demand.	61%	30%	8%	
Creating a conference experience and ensuring fun is integrated throughout is not just 'nice to have', it's essential for conferences today.	42%	34%	19%	4%
People are increasingly time poor therefore they go to conferences to maximise the learning and information rather than the fun and experience of it.	21%	35%	19%	17% 3%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

- ■ Strongly agree
- ■ Somewhat agree
- ■ Slightly agree
- ■ Slightly disagree
- ■ Somewhat disagree
- ■ Strongly disagree
- ■ I don't know

Q. How important will the destination experience be for promoting a conference/business event in the future?
(n=147)

Extremely important	43%
Very important	42%
Somewhat important	13%
Slightly important	2%
Not at all important	0%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%

Q. How optimistic are you about the future of the MICE industry for the next 15 years ahead?
(n=177)

Extremely optimistic	8%
Very optimistic	55%
Somewhat optimistic	36%
Somewhat pessimistic	1%
Very pessimistic	0%
Extremely pessimistic	0%

0% 10% 20% 30% 40% 50% 60%

"The time of being the passive delegate is over.

I think people are looking for far more engagement and interaction, death by powerpoint is on its way out.

People will want information in short digestible bursts."

Meetings of the Future

Meetings provide valuable professional investment

A strength of the meetings and events industry is the professional investment it provides to its attendees. Despite this, industry experts suggest that the ability of the meetings industry to effectively communicate this value is crucial to the industry's longevity.

Attendees are increasingly time poor, and therefore attending less events. One expert said "I still think the value of business events is really strong... I think the connections that you gain, the experiences you get are far more valuable than the other forms of learning that are available to us".

The challenge for the meetings industry therefore is to communicate the valuable professional investment it provides attendees, and what it can provide for industries on a broader scale. Increasingly event organisers are needing to provide a value proposal for employees to give to their employers to show what they will get out of an event and the benefit to the company as a whole.

"That's what exhibitors and attendees expect... that we give them a value proposal, with which they can go to their management justifying the investment of the event that they want to go to, in order to attend an event."

> *"What attendees get out of those meetings both from a personal, or career development/networking perspective is also something that is factored in more greatly in their decision to attend"*
>
> *- Industry Expert*

Customisation of program structure and event experience

Customisation and personalisation of the event experience is expected to "be huge, people are looking for something that is personal and tailored, something that is really meaningful to them".

Industry experts are expecting the total length of conferences to decrease, but an attendees' ability to customise their experience to increase. In the future attendees will have "more ability to go and see exactly what they want to see, so instead of doing it in 4 days they are doing it in 2 days, but they have far more flexibility in what they want to go and see, so its personalising it for each delegate".

This personalisation may be incorporated into the registration process, right through to the tailoring of programs to individual preferences. Experts suggest that the ability to personalise every aspect to the individual level may be difficult for large groups, but the ability to segment and customise may be effective.

For the customisation of attendee experiences, the program structure of conferences is expected to adjust in the coming years. Experts suggest "it will be far more engaging and interactive... I believe engagement will be more personalised, as you will be able to instantly access the exact speaker information you want, the exact stream you want... that will be very easy".

Attendees may also have the ability to attend some aspects of the event face to face, and some virtually. "Have the option for online or an interactive option... they might not see that the full program is relevant to them, so they may want to be able to dial in and participate in
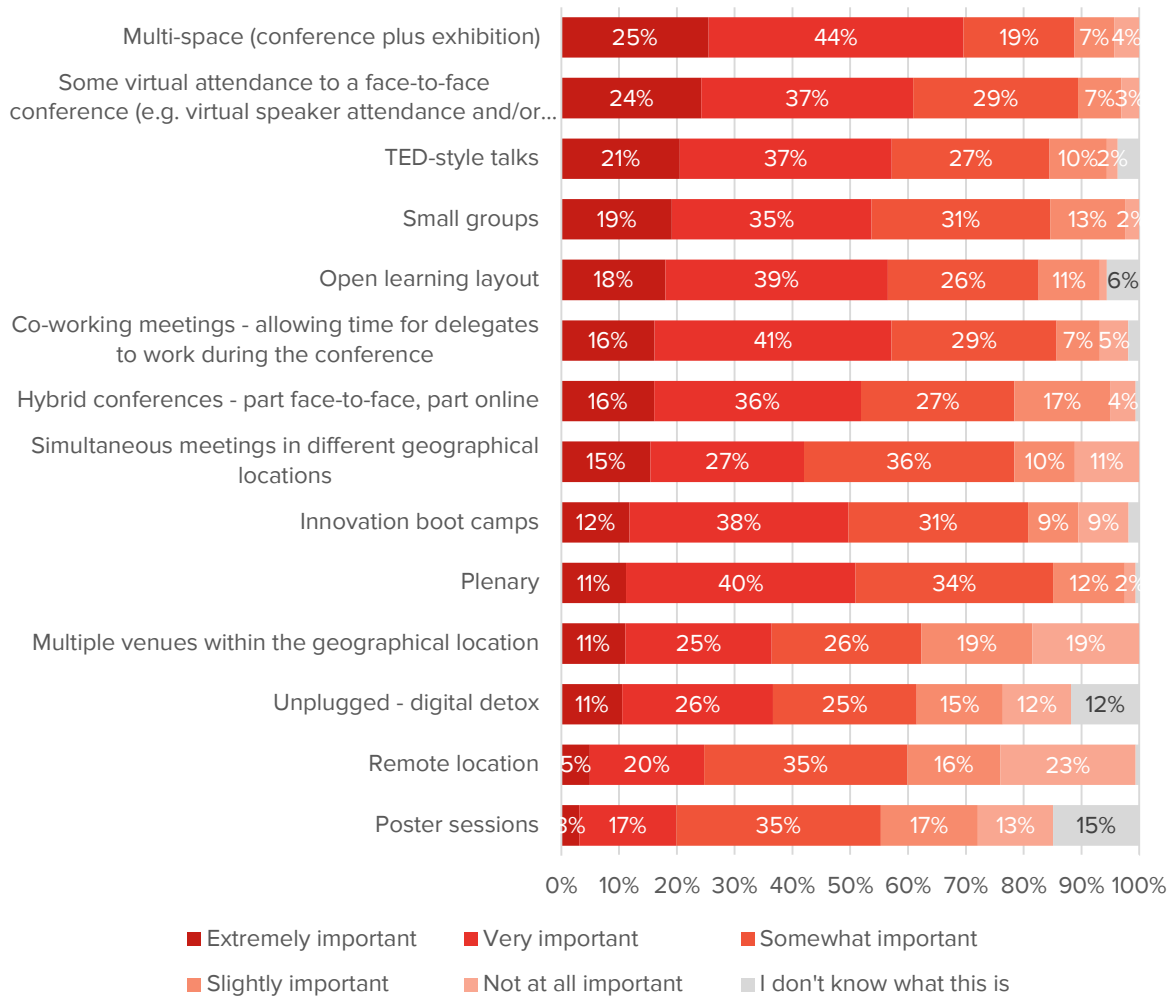
sessions of a forum that are just relevant to them... they will pick and choose which pieces are more relevant".

Conferences are not just about knowledge outcomes, attendees have the desire to collaborate and discover for themselves. "It needs to be able to be customised, it needs to be able to be personalised and you need to tell me some and you need to let me explore some."
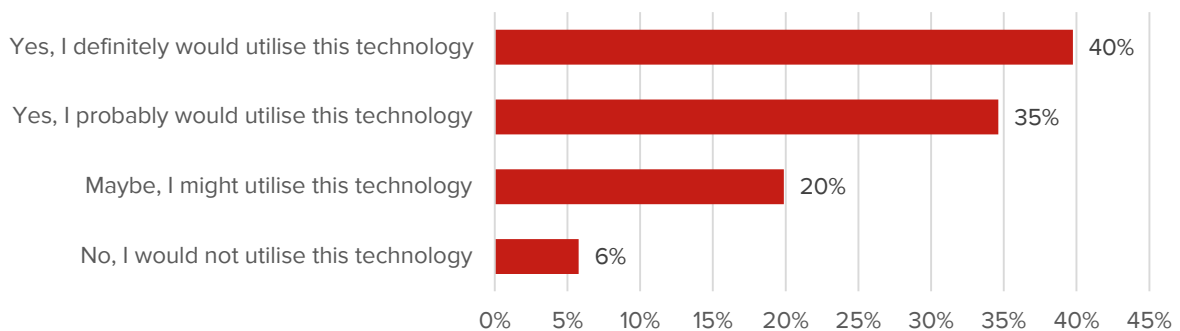
For discovery as part of the destination experience, an expert discussed the concept of voluntourism, whereby practical experiences are weaved into the meeting. Conference attendees have the opportunity to apply what they have been learning, and give back to the local community. One industry expert suggested a move towards "half day meetings, with excursions. I also see some tourism interwoven into that, where people would have the opportunity to have a clinic. For example, a dental clinic in an underserved rural community, depending on where the meeting is housed, so that they can give back; and I do think that that is something that newer generations could do as part of their meeting experience."

Respondents support this desire for customisation, collaboration and an opportunity to discover. They indicated that the top 5 extremely or very important program formats for business events in the future are, multi-space (conference plus exhibition, 69%), some virtual attendance to a face to face conference (61%), TED-style talks (58%), small groups (54%), and open learning layout (57%).

Q. How important do you think the following program formats will become for business events in the future?
(n=161)

Format	Extremely important	Very important	Somewhat important	Slightly important	Not at all important	I don't know what this is
Multi-space (conference plus exhibition)	25%	44%	19%	7%	4%	
Some virtual attendance to a face-to-face conference (e.g. virtual speaker attendance and/or...	24%	37%	29%	7%	3%	
TED-style talks	21%	37%	27%	10%	2%	
Small groups	19%	35%	31%	13%	2%	
Open learning layout	18%	39%	26%	11%	6%	
Co-working meetings - allowing time for delegates to work during the conference	16%	41%	29%	7%	5%	
Hybrid conferences - part face-to-face, part online	16%	36%	27%	17%	4%	
Simultaneous meetings in different geographical locations	15%	27%	36%	10%	11%	
Innovation boot camps	12%	38%	31%	9%	9%	
Plenary	11%	40%	34%	12%	2%	
Multiple venues within the geographical location	11%	25%	26%	19%	19%	
Unplugged - digital detox	11%	26%	25%	15%	12%	12%
Remote location	5%	20%	35%	16%	23%	
Poster sessions	3%	17%	35%	17%	13%	15%

Legend: ■ Extremely important ■ Very important ■ Somewhat important ■ Slightly important ■ Not at all important ■ I don't know what this is

Q. If you could make keynote sessions more adaptive to the audience's needs by having conference attendees vote in real time to influence and steer the content or to contribute to the story, would you utilise this technology?
(n=156)

Response	Percentage
Yes, I definitely would utilise this technology	40%
Yes, I probably would utilise this technology	35%
Maybe, I might utilise this technology	20%
No, I would not utilise this technology	6%

Technological advances increase interaction in meetings

Advances in technology are changing the way we interact, communicate and experience meetings. An Industry expert said "it (technology) will underride everything from personalising the experience, registering... I think that there will be the ability to use your device... for interaction with the speaker, for voting, already you can do this, but it will become more popular."

Further to this "it won't eradicate the meetings industry, I think that face to face engagement, the networks, the legacy... the collaboration that goes on is irreplaceable. How we use technology within meetings will certainly change."

In the next 15 years the five technologies respondents most believe will have a significant or great impact on the events industry are the Internet of things (interconnectivity of devices, 77%), live information feeding to instant presentation adaption (77%), real time language translation (75%), augmented/virtual reality (64%), and interactive tables (68%).

Industry experts support these findings, acknowledging the need to integrate technology into every aspect of an event, in particular, transforming the delegate experience from passive to active collaboration. Further to this, three in four survey respondents (75%) indicated that they would utilise technology that allowed attendees to contribute in real time and influence the content or story throughout a keynote session. When analysed further middle

management is the most likely to incorporate this type of technology (85% c.f. Junior 81%, CEO 67%, Senior 65%).

"We will see more advanced technologies for the delivery of content, more voting technologies, more ways to participate, more ways to evaluate and more ways to integrate people"
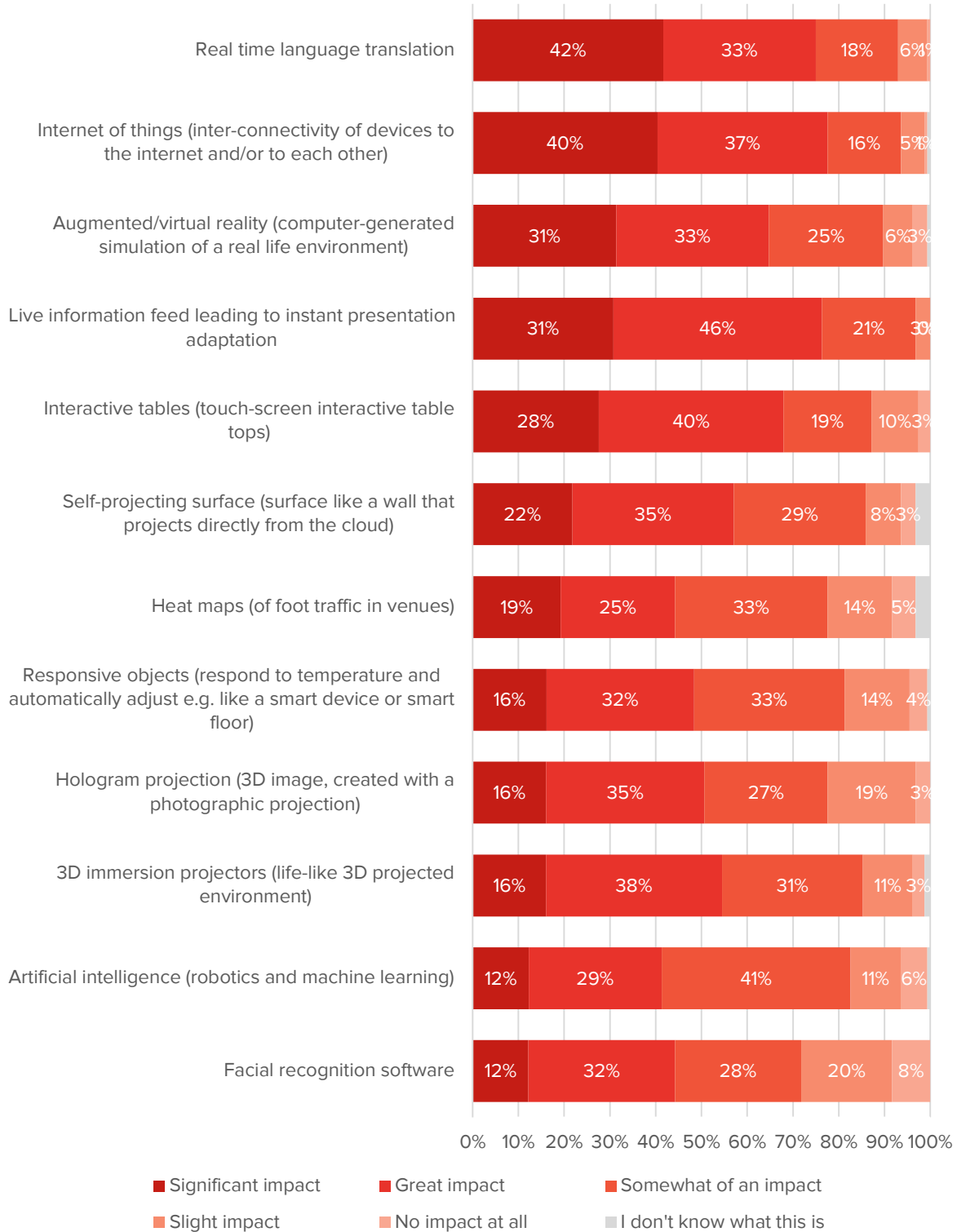

Experts suggest that consumer technology/apps tailored specifically for the event are on the increase, the "value add that an app can bring in terms of keeping people engaged, networking people at the event" is significant. Some experts suggest that in the future this consumer technology will include "tools to see who is around and how [they] can communicate with them".

Two in four respondents (44%) believed that heat maps are going to have a great or significant impact on the events industry in the next 15 years. Experts see tools that measure the flow of traffic as a potential area of significant development in future. There is "new technology where you can measure the flow of people during the conference; where do they attend, where do they go, how long do they stay at each booth, and this gives you a lot of information that can be used marketing wise".

Q. To what degree do you think the following technologies will impact the business events industry in the next 15 years?
(n=155)

Technology	Significant impact	Great impact	Somewhat of an impact	Slight impact	No impact at all	I don't know what this is
Real time language translation	42%	33%	18%	6%	1%	
Internet of things (inter-connectivity of devices to the internet and/or to each other)	40%	37%	16%	5%	1%	
Augmented/virtual reality (computer-generated simulation of a real life environment)	31%	33%	25%	6%	3%	
Live information feed leading to instant presentation adaptation	31%	46%	21%	3%	0%	
Interactive tables (touch-screen interactive table tops)	28%	40%	19%	10%	3%	
Self-projecting surface (surface like a wall that projects directly from the cloud)	22%	35%	29%	8%	3%	
Heat maps (of foot traffic in venues)	19%	25%	33%	14%	5%	
Responsive objects (respond to temperature and automatically adjust e.g. like a smart device or smart floor)	16%	32%	33%	14%	4%	
Hologram projection (3D image, created with a photographic projection)	16%	35%	27%	19%	3%	
3D immersion projectors (life-like 3D projected environment)	16%	38%	31%	11%	3%	
Artificial intelligence (robotics and machine learning)	12%	29%	41%	11%	6%	
Facial recognition software	12%	32%	28%	20%	8%	

Legend: Significant impact · Great impact · Somewhat of an impact · Slight impact · No impact at all · I don't know what this is

Augmented Virtual Reality and Artificial Intelligence transform the event experience

Augmented Virtual Reality (AVR) is expected to have a great or significant impact on the business events industry (64% of respondents). Industry experts similarly see significant change in the future due to AVR. "Virtual reality is definitely one that I think in the future will become more a part of the event than other technology that we know about these days... in the fact that you can connect different places on the planet, and have meetings with people who are at the event, and people who are not at the event."

As virtual reality becomes more readily available, experts suggest that it will be "more in demand by the attendees" and increasingly utilised in the event experience. From the ability to show 'live surgeries', and incorporate 'holograms' of speakers on stage, to being "able to really immerse the audience".

Some experts believe you will see the impact of "[virtual reality] on the exhibit floor perhaps more than you will see it in a business meeting" by enabling exhibitors to demonstrate their products. This is already occurring in some places around the world "we are seeing the ability where exhibitors can use virtual reality to show people... their warehouse, so you can actually be standing in a booth, but looking around you at the warehouse of potentially the manufacturer who has that booth".

Experts expect virtual reality to transform the way the destinations and experiences are marketed. From the ability to virtually tour conference centres before the event. "If I can go online and... virtually tour a home, why can I not do that in a convention venue?... again using virtual reality I would love to be able to see how far my hotel that I just booked is from

the convention centre in walking distance, to be able to virtually do that and if I'm not happy with my choice the ability to go and change my choice."

To promoting the destination experience. "In the past you just passed on videos or pictures to the attendees to promote the destination. With the AR (augmented reality) or the VR (virtual reality) they can really feel like a 3D, they can feel the attractions of the destinations you are promoting.... When you are promoting the Chinese Great Coral Reef, if you have a headset with a 3D image... you are swimming underwater you can feel the fish, feel the shark. I think that is a very good experience and a very good promotional tool".

Further to this, the development of artificial intelligence (AI) may prove to be increasingly beneficial to conference organisers. Experts expect that in the future artificial intelligence will help to identify potential pain points before they become an issue.

"You usually learn at least 50% of the problems you had after the fact from surveys and such, I think AI will start to be smart enough to let an organiser know on the fly what people are talking about.... when there is an issue, send a notification saying we need to send staff to this area because the bar is overcrowded before a human even knows it is."

The ability to improve the efficiency and ease of the event experience through facial recognition software is already being utilised to increase efficiencies by giving attendees access to the venue via facial recognition. An Industry expert indicated that they "are already working on facial recognition software... so that people can access the venue quicker."

Increasingly challenging to get communication cut through

Industry Experts expect that communication channels in the future "will look very different, right now we communicate by email or text... we are seeing communication on a more social media level, and a business social media level".

Although the trend is shifting to engaging potential attendees through social media, email and online are still one of the key communication channels with attendees. The current challenge with this is that "people are so overwhelmed with email... it's hard to get cut through on email".

In response to this, experts suggested "ways of making it more personal, more tailored, through leveraging social media and other more sophisticated tools" may impact the attendance of events, "organisations that are able to do that [tailor and personalise] will get much stronger attendance".

Mega apps are also starting to appear in the industry. "It's like a mega app they use in China for everything... email is no longer used in China at all, you are communicating with everybody on this platform. It allows you to do an enormous amount of things within that platform. One of the things it does is you know at any time where your networks are and what they are doing and how far away they are from you, I could for example, be at a conference and see who is nearby and say, 'You guys have got to come down here right now, this is an amazing conference.' Little things like that are available now, so whatever is coming I think the ability to communicate with your tribe or your network will become easier".

The increased reliance on social media, and online forms of communication, still have not changed the desire for people to communicate face to face. Face to face communication, throughout the event, is seen as the number one extremely important (61%) communication channel for the future of the conventions and business events industry, followed by online 51%, social media (40%), and event apps (35%).

Further to this senior level staff are more inclined to emphasise the extreme importance of face-to-face communication over junior staff (91% CEOs, 98% Senior management, 88% Middle management, 67% Junior staff).
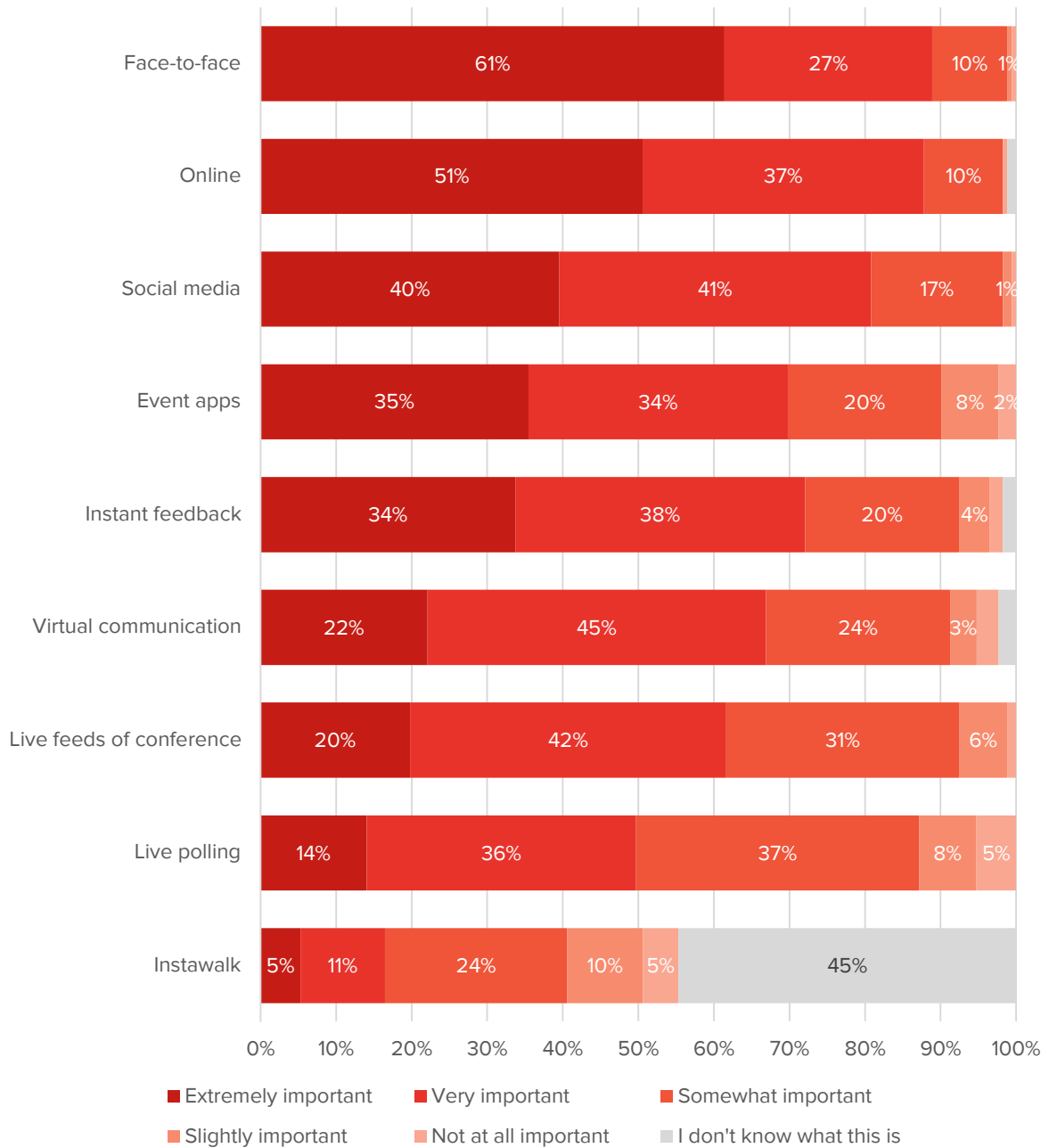
"...ways of making it more personal, more tailored, through leveraging social media and other more sophisticated tools... organisations that are able to do that will get much stronger attendance".

- Industry Expert

Q. How important do you think the following communication channels are for the future of the conventions and business events industry (during the event)?
(n=170)

Channel	Extremely important	Very important	Somewhat important	Slightly important	Not at all important	I don't know what this is
Face-to-face	61%	27%	10%	1%		
Online	51%	37%	10%			
Social media	40%	41%	17%	1%		
Event apps	35%	34%	20%	8%	2%	
Instant feedback	34%	38%	20%	4%		
Virtual communication	22%	45%	24%	3%		
Live feeds of conference	20%	42%	31%	6%		
Live polling	14%	36%	37%	8%	5%	
Instawalk	5%	11%	24%	10%	5%	45%

Legend:
- Extremely important
- Very important
- Somewhat important
- Slightly important
- Not at all important
- I don't know what this is

Venue design for the next generation

What does the next generation want out of a venue? "Flexibility, connection, and ease of movement, all tied together."

Industry experts suggest a radical shift needs to take place in venue architecture to facilitate the changing program structure and desires of attendees. "Most of what is used at events nowadays, and most events, should be completely erased and started from scratch. Things like trade floors are miserable experiences for everyone, they need to be reinvented. There are things that are being sold on the concept from the 40's and 50's and that just don't apply to the modern world".

Experts suggested that open and flexible spaces are desired features of new conference facilities. "They will be far more open space related, recognising that one on one interaction that can take place; smaller networking that goes on. I think the flow of space is really important, it always has been but looking within that we will still want sizeable plenary rooms and break out rooms, but maybe the breakout room seating is completely different".

To facilitate connection, and attendees desire for social interaction and networking, venues have "got to [have] private business conversation space, particularly in large venues or convention centres. Networking is important, but also to have business conversations, so [need to have] more sort of intimate networking spaces, in these large venues... those will help maximise peoples' attendance".

Venue design was also seen by experts as an opportunity to enhance the overall experience for attendees. "I would extend the architecture outside of the building and green, I think that's important so that it is not just a standalone facility to house a meeting but that there are multiple opportunities to see and do and touch and feel the culture of the destination".

A challenge of venue design that was identified however, is that the "cycle of refreshing is getting shorter and shorter. Trends used to last 2 or 3 years and now they last 1 or 2 years. The same will be with event spaces, they will have to be refreshed more often... people that have been to an event once in one space will not want to go back to that space if it looks the same. It's looking for what's new or what's on trend".

Therefore, flexibility in conference venues is paramount; with open spaces, various sized rooms that can be changed depending on the event, purpose built areas to facilitate networking and human connection, and with aspects of the local culture included to enhance the attendee's destination experience.

"From a physical point of view, flexibility will be the key"

- Industry Expert

Opportunities to innovate

The five biggest challenges facing the meetings industry in the next 15 years according to respondents are attendees' lack of time to travel and attend (73%), destination costs (70%), travel costs (69%), socio-political factors (63%), and fiscal changes (55%).

Industry experts also identified these as some of the key challenges facing the meetings industry. "There is obviously a desire to come to Australia, and the hurdle to that are cost and time". Attendees are increasingly finding it more difficult to take time out of the office. "You have got a conflicting time thing, I believe we are all getting time poor, so usually we find that people have a certain amount of time and that's it and that's why they want to personalise, and that's why they even want appointment scheduling, because they want to get in and out".

One expert's solution to this is shorter functions. "In terms of local events, we have had tremendous success with half day functions. Lower cost, keeping it really topical, and people can easily find time out of the office for half a day". In regards to global events, "in terms of length, some of the things we are finding, for a global event, a week is a good amount of time to travel internationally".

The ever-increasing costs are also providing a challenge for the meetings industry. The battle for event organisers is to manage their costs, whilst still keeping the conference affordable for attendees. A challenge is our "increased costs and the ability to keep our costs down so that the registration fees will be affordable and so that we're not losing money".

Further to this, industry experts suggested the sharing economy is having an impact on bookings with hotels, which are the traditional providers of accommodation through the event organisers. "People are putting more shared accommodation out into the public domain, so attendees may actually be choosing shared accommodation. So it is an opportunity for attendees coming, but it does present a risk from a company point of view as to not actually knowing where their attendees are."

The growth in the sharing economy however may have its benefits too. An industry expert indicated a desire for new technology that facilitates increased sharing of information between attendees about the destination experience "'hey I'm thinking about either doing tour A or tour B, does anyone have any feedback' and using that to build their trip…the use of technologies, of mouldable technology and information sharing".
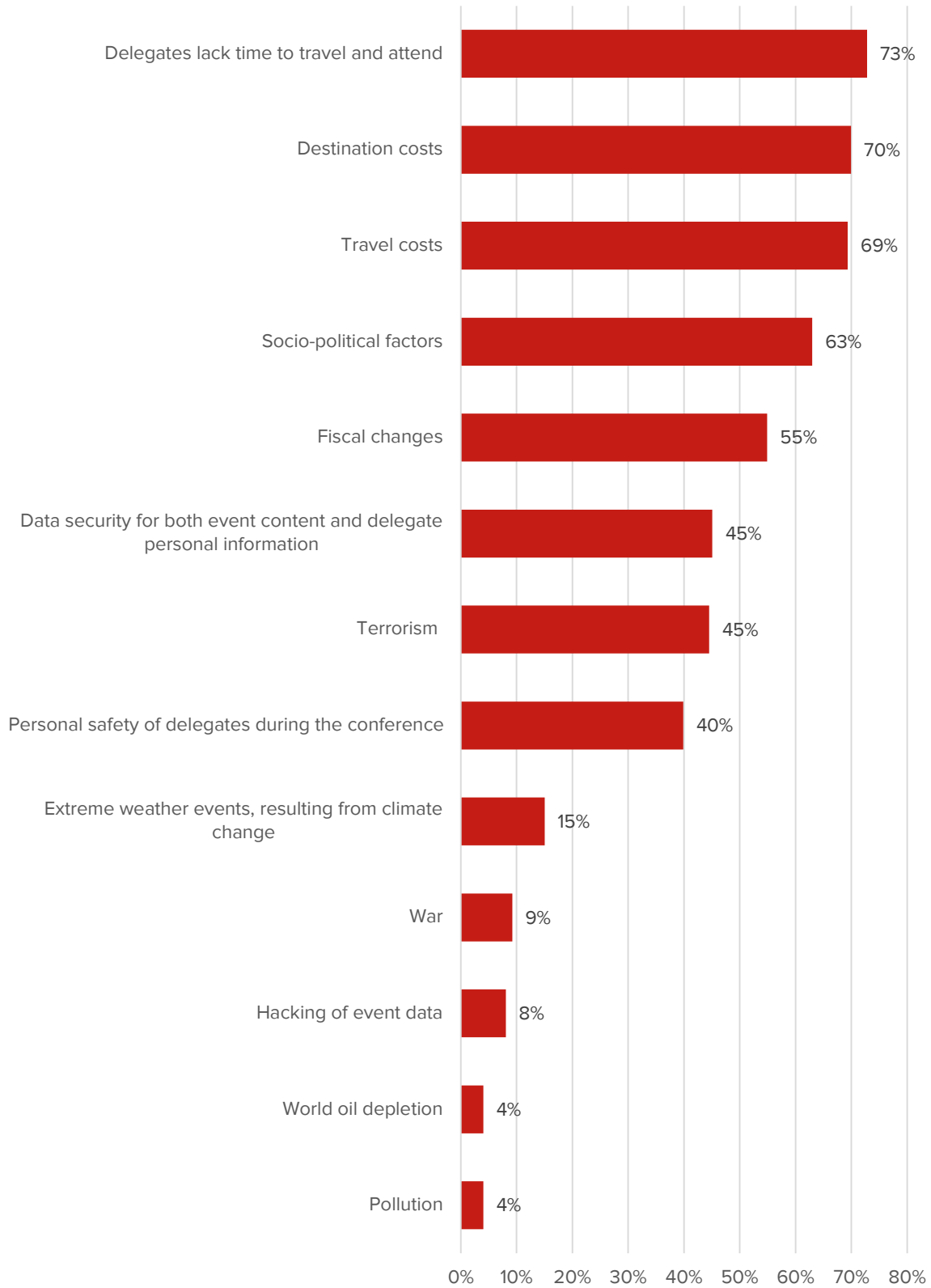
Lastly, socio-political factors are also seen to be having an effect on the future of the meetings industry. The "political environment, definitely the ability to have people not just travel outside of their own country, but to get into other countries, I see that tightening up, and having a big impact on the ability to participate in a meeting".

If global travel was to get more difficult, there may be increased opportunities to run smaller conferences in many locations, giving event organisers the ability to engage more attendees.

"I may only have a set of thirty thousand attendees at one destination, I might spread that five times over in different regions of the world, so that people from that region can attend and participate and still have the same type of experience. So I do think people will diversify their meetings instead of just one mass meeting with the same information, do it five times so that people can get there more easily."

Q. What do you think are the biggest challenges that the meetings industry will face in the next 15 years?
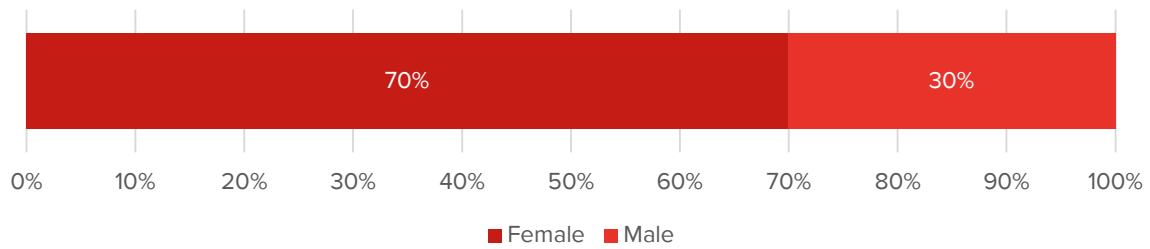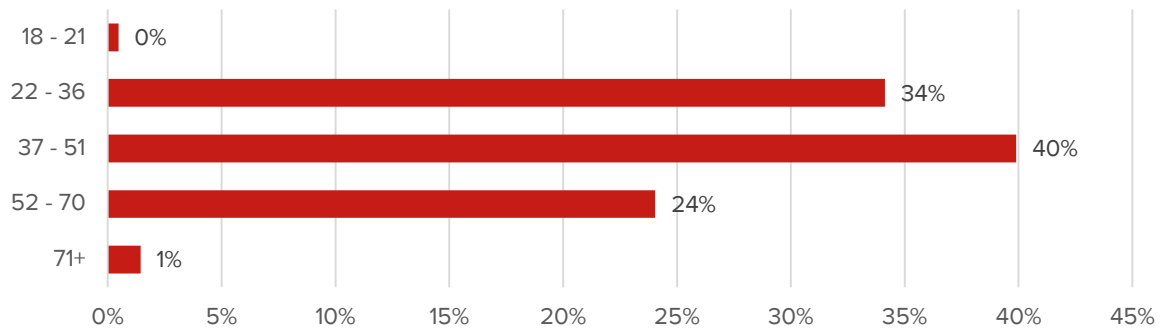*(n=173)*

Challenge	Percentage
Delegates lack time to travel and attend	73%
Destination costs	70%
Travel costs	69%
Socio-political factors	63%
Fiscal changes	55%
Data security for both event content and delegate personal information	45%
Terrorism	45%
Personal safety of delegates during the conference	40%
Extreme weather events, resulting from climate change	15%
War	9%
Hacking of event data	8%
World oil depletion	4%
Pollution	4%

Demographics

Gender

Q. Are you male or female?
(n=206)

70%	30%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Female ■ Male

Age

Q. What age will you be in 2016?
(n=208)

Age	Percentage
18 - 21	0%
22 - 36	34%
37 - 51	40%
52 - 70	24%
71+	1%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45%

Location

Q. Where do you usually live?
(n=206)

Location	Percentage
Australia / New Zealand	84%
North America	6%
Asia	5%
Europe	4%
Africa	1%
Middle East	0.5%
South America	0%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%
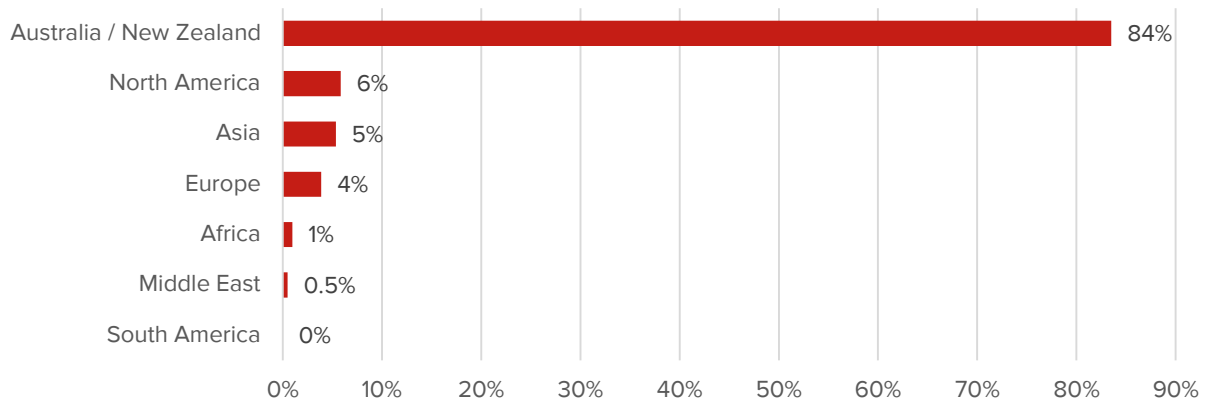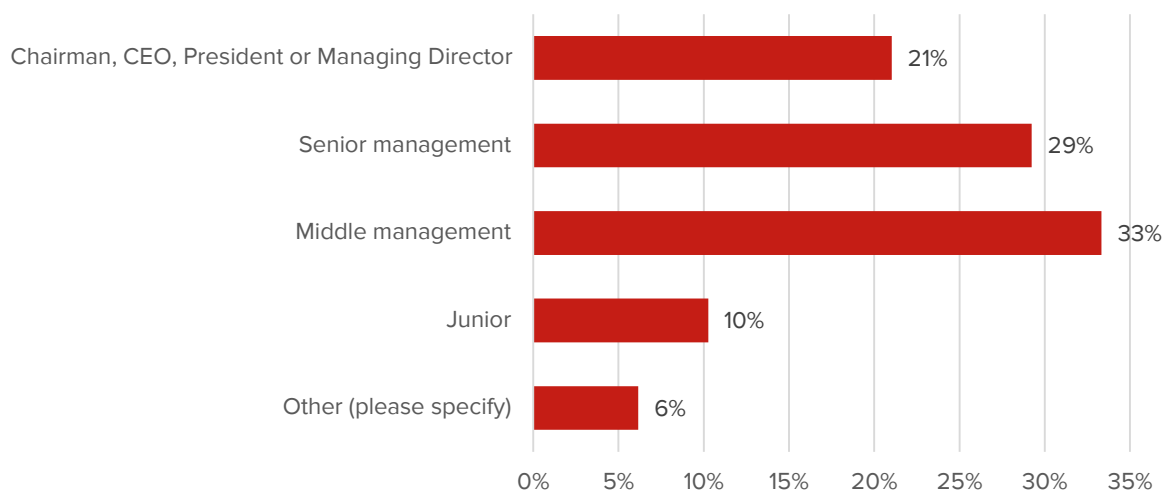
Industry Involvement

Q. Which of the following best describes your involvement in the meetings, incentives, conferences and events (MICE) industry?
(n=195)

Category	%
Other (please specify)	23%
Event management	19%
Venue	16%
Professional conference organiser	14%
Other event supplier	10%
Incentive group travel	4%
Academic	4%
International association	4%
Delegate	3%
Students	3%
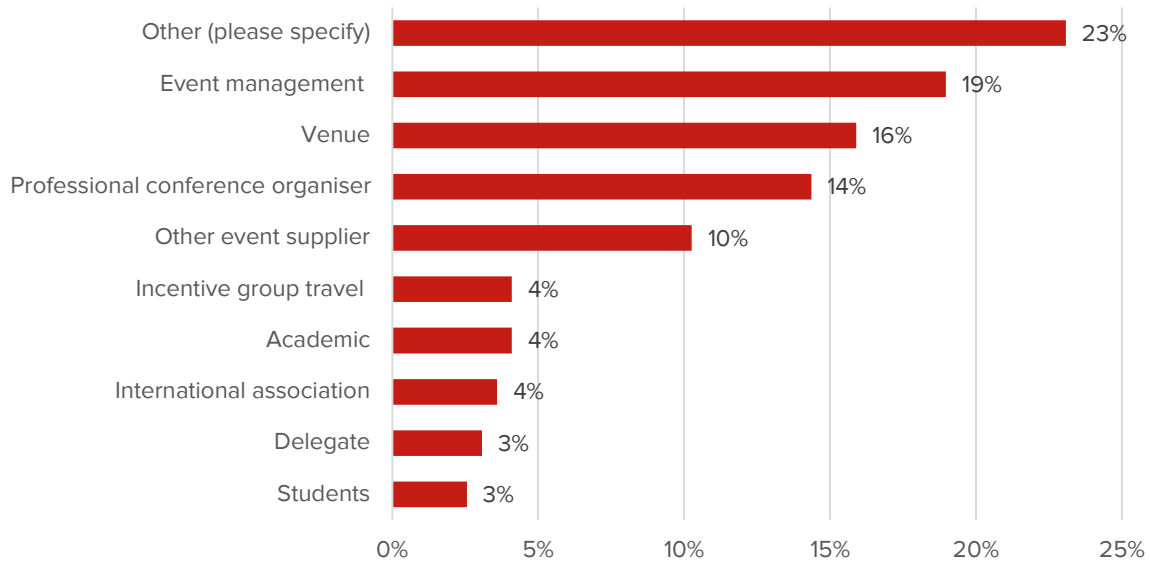
Position

Q. Which of the following best describes your position?
(n=195)

Position	%
Chairman, CEO, President or Managing Director	21%
Senior management	29%
Middle management	33%
Junior	10%
Other (please specify)	6%

mccrindle

MCCRINDLE

T: +61 2 8824 3422
E: info@mccrindle.com.au
W: mccrindle.com.au

mccrindleresearch

mccrindle-research

@MarkMcCrindle

mccrindleresearch

MELBOURNE Convention Bureau

MELBOURNE CONVENTION BUREAU

T: +61 3 9002 2222
E: info@melbournecb.com.au
W: melbournecb.com.au

Melbourne Convention Bureau

Melbourne Convention Bureau

@melbconventions

@melbourneconventionbureau