

Convention 2020 – The Future of Exhibitions, Meetings and Events

Phase 1 Survey Findings March 5th 2010

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Introduction

- Convention 2020 is a global strategic foresight study designed to help all members of the meetings industry prepare for the decade ahead and ensure they stay competitive
- The founding sponsors are the International Congress and Convention Association (ICCA), IMEX and Fast Future Research
- This document presents the results of the phase 1 survey conducted as part of the Convention 2020 study between November 2009 and January 2010
- Subsequent reports from the study will be presented at IMEX in May 2010 and the ICCA convention in Hyderabad in October 2010
- The aims of the survey were to stimulate new thinking about the future of industry and to identify key topics to be explored in greater depth in the subsequent research activities







Convention 2020 - Objectives

The objectives of the study are to use multiple futures research techniques to:

- Help the industry value chain prepare for the future
- Provide key insights on how live meetings could evolve by 2020
- Help meeting owners, managers and designers think about the future customer experience
- Help venues and destinations think about the implications for their strategy
- Suggest emerging strategies, approaches and business models for events, venues and destinations
- Use a highly participative 'open' research process to educate and inspire participants







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Survey Findings

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1. Survey Outline

- The survey ran from November 2009 to January 2010. It was promoted to the networks of ICCA, IMEX and Fast Future and via a number of events industry groups and social networks
- A total of 1125 respondents from 76 countries completed the survey
- The three largest groups of respondents came from the US (22%), Germany (12%) and the UK (11%)
- The largest regional response came from Europe (59%) followed by North America (23%)
- The majority of respondents (76%) came from one of the sectors of the meetings and events industry.
- 19% of respondents were members of ICCA
- A broad range of industry sectors were represented
- The largest single group of respondents from within the industry were external event organisers and meeting planners (14%)

2. Summary of Phase 1 Survey Findings – 1 of 2

The Industry Today

- The biggest current barriers to event effectiveness are seen to be the cost of attending, poor organisation and a lack of focus in the design
- The quality of content, interaction, technology and networking were seen to be the main drivers of an effective and exciting event

For events in 2020

- Reasons to Attend The Quality of Networking (76%) was the biggest single factor that would encourage delegates to attend events, less than 50% cited price as an influencing factor and only 1% said they would not attend live events in 2020
- Meeting Demand 74% felt their organisation would maintain their investment in live events in 2020, while 46% felt time and cost pressure might deter organisations from sending delegates and 59% felt their organisation would be investing far more in alternatives to live events
- Meeting Supply 49% said there would be fewer but larger events, while 79% expected a growth in smaller more specialised meetings and 48% thought there would be an explosion in the number of free or very low cost evening only meetings held in low cost venues

2. Summary of Phase 1 Survey Findings – 2 of 2

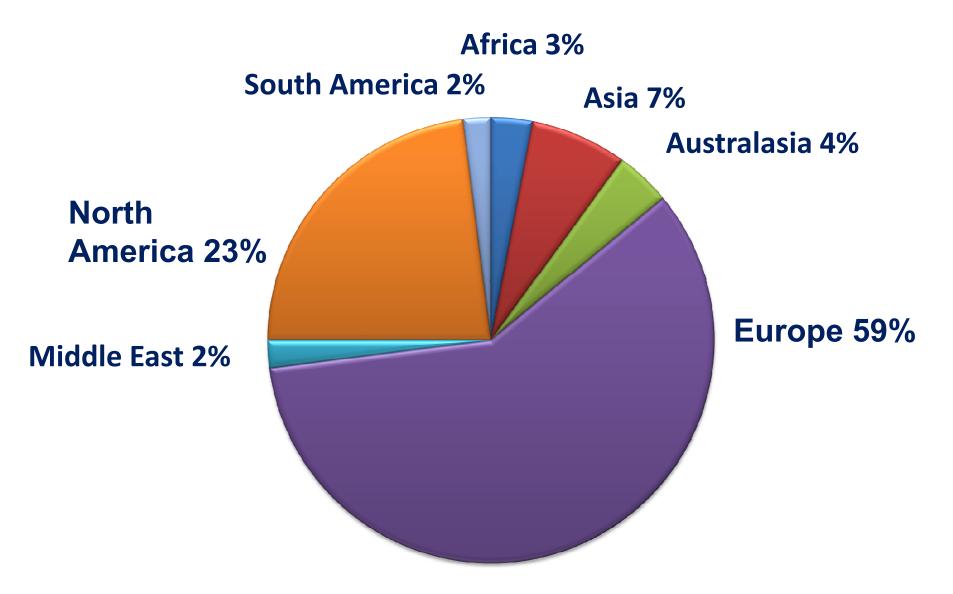
For events in 2020

- Business Models 77% believe events will need to offer strong price based incentives to attract the desired delegates, 60% expect to see a rise in pay as you go / pay per session type models and 76% think there will be far more opportunities to conduct transactions
- Event Technology The most commonly expected developments are 'Live video streaming to remote participants '(75%), 'A social network before, during and after events' (70%) and 'All event content downloaded to our mobile phones' (64%). Whilst more advanced immersive and experiential technologies were not ranked highly as individual developments, there was strong support for their potential applications when discussed subsequently in scenarios for personalisation.
- Personalisation 79% expect a totally personalised technology experience and 70% felt this individual customisation would extend to areas such as food and seating. 93% believe that technology will enable capture and analysis of every activity, presentation and conversation
- Sustainability 70% say ethical and environmental factors will influence the decision to attend
- Convention Centre Challenges The greatest competition to convention centres is expected to come from 'Schools, universities and colleges' (63%), 'Museums, galleries and libraries' (56%) and 'Meeting facilities in office buildings' (50%)

3.1 Survey Respondents

Rank	Country	Percentage of total Respondents
1	United States	20
2	Germany	12
3	United Kingdom	11
4	France	3
5	Australia	3
6	Italy	3
7	Netherlands	3
8	Spain	3
9	Switzerland	3
10	Belgium	3

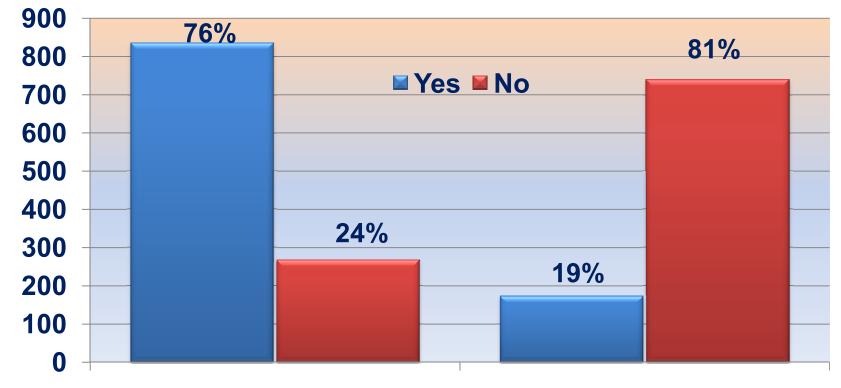
3.2 Regional Distribution of Respondents



908 respondents

3.3 Industry Representation

No . of Respondents



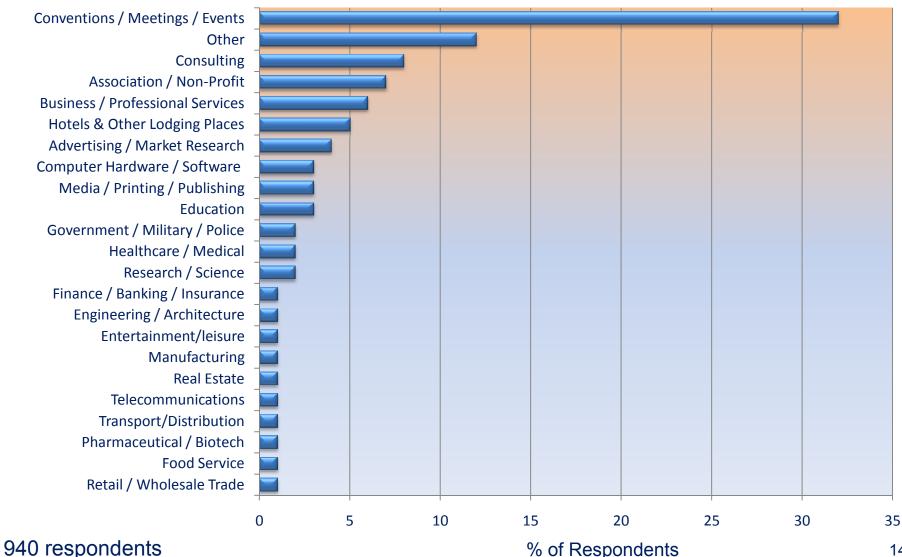
Do you work in the meetings and events industry?

Are you a member of ICCA?

1103 respondents

912 respondents

3.4 What industry sector do you work in?



% of Respondents

3.5 Do you work in the conventions or travel industry – if so what sector?



% of Respondents

4. Starting Assumptions

Priori to completing the survey, participants were asked to think about what the world in 2020 might be like and were given the following to consider as reasonable starting assumptions:

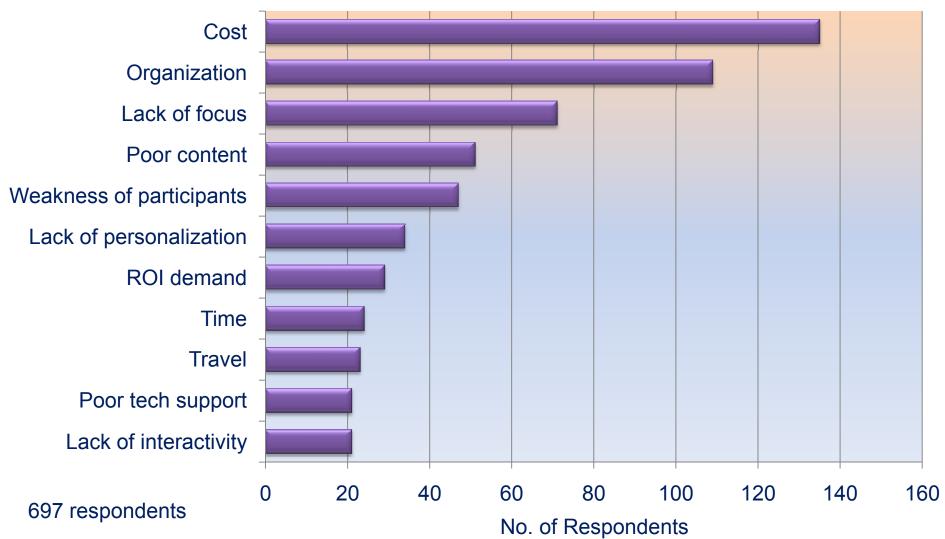
- Further economic turbulence and potential downturns between 2010 2020
- Sustainable growth is still the dominant driver for most economies
- Countries such as China and India are now major economic powers
- Public sector debt has been a major issue for developed economies in particular
- A global population of 7.5 8.0 billion
- Globalisation and interconnectivity between companies and value chains will continue to increase
- No major new multi-nation global conflicts, national geographic boundaries of the G20 economies are largely similar to today and global institutions such as the UN, IMF and World Bank still carry influence
- Environment and sustainability challenges remain prominent concerns
- Global social challenges remain around poverty, hunger, health and education
- Advances in flight technology have shortened travel times
- Scientific progress and new technological advances continue to accelerate (e.g. biotechnology, nanotechnology, next generation computers).
- Advances in experiential technologies will lead to widespread use of developments such as virtual worlds, holograms, 3D projection, 3D television, virtual reality and interactive surfaces
- Business will have more mechanisms to connect with customers and prospects
- Convention centres will still exist
- Competition in every sector will intensify and radical new business models will emerge.

5. The Industry Today

- Participants were asked to share their views on the main barriers to effectiveness for conferences and events today.
- The three topics that received the highest number of comments were the cost of attending events, poor organisation and a lack of focus in the design of events. The last two items highlight the growing importance of the role of event design / meeting architecture in mapping out the entire meeting experience.
- Respondents were also asked to identify the most useful and exciting events they have attended and to highlight the factors that made them a success. Some of the events identified will be profiled in future Convention 2020 project reports.
- The factors considered to have the greatest bearing on creating a useful and exciting event were the quality of the content, high levels of interaction between delegates and speakers, effective use of technology before during and after the event and the quality of networking.

5.1 Barriers to Effectiveness

What do you consider are the biggest problems today that stop conferences and exhibitions from being fully effective?



5.2 Drivers of Useful and Exciting Events

What are the most useful and exciting events you have attended recently and why?

140 120 100 80 60 40 20 0 Interaction Content Use of Networking Organization Location Access to Sustainable technology key decision makers

No. of Respondents

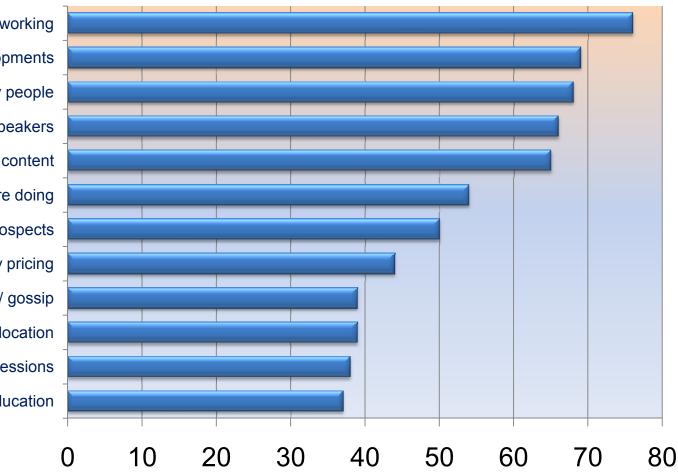
604 respondents

6. The Decision to Attend

- Participants were asked to envisage life in 2020 and then select all of the factors from a list of 24 possibilities - which would encourage them to attend live events such as conferences and exhibitions
- The top 3 factors selected were 'Quality of Networking ' (76%), 'Seeing the very Latest Developments in my Sector '(69%) and a 'Guaranteed Opportunity to Meet Key People '(68%)
- Despite the growing emphasis on the importance of technology in events, the top ten factors selected were not directly technology related
- Surprisingly given the impact of the economic downturn across most sectors, less than 50% said they would be motivated by economic factors just 44% said they would be attracted by 'Value for Money Pricing', 33% by 'Low Cost Attendance' and only 31% by 'Free Attendance'
- Interestingly given the growing debate about whether virtual events will replace live ones, only 1% said they would not attend live events at all – possibly not a great surprise though given the high proportion of industry respondents in the survey.

6.1 Factors influencing the decision to attend in 2020 (%) – 1 of 2

Imagine your life in 2020, what are the factors that would encourage you to attend live events such as conferences and exhibitions?

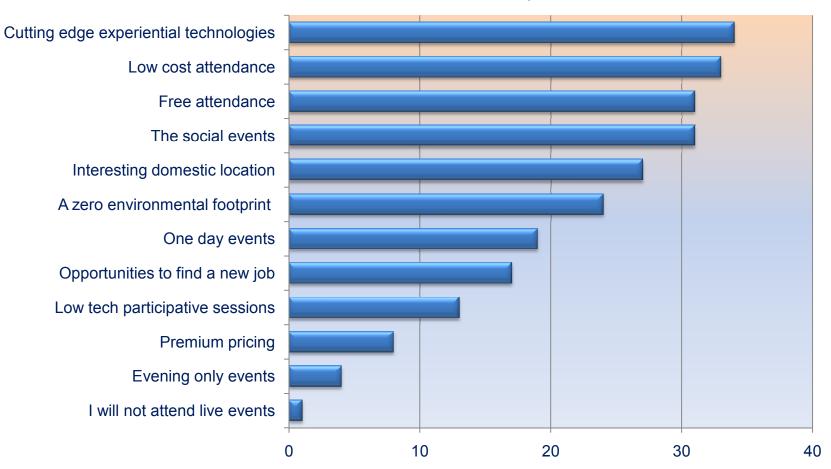


% of Respondents

Quality of networking Seeing very latest sector developments Guaranteed opportunity to meet key people High quality speakers High quality educational content Find out what competitors are doing Identifying new prospects Value for money pricing Latest industry buzz / gossip Interesting foreign location High tech participative sessions Personalized education

6.1 Factors influencing the decision to attend in 2020 (%) – 2 of 2

Imagine your life in 2020, what are the factors that would encourage you to attend live events such as conferences and exhibitions?



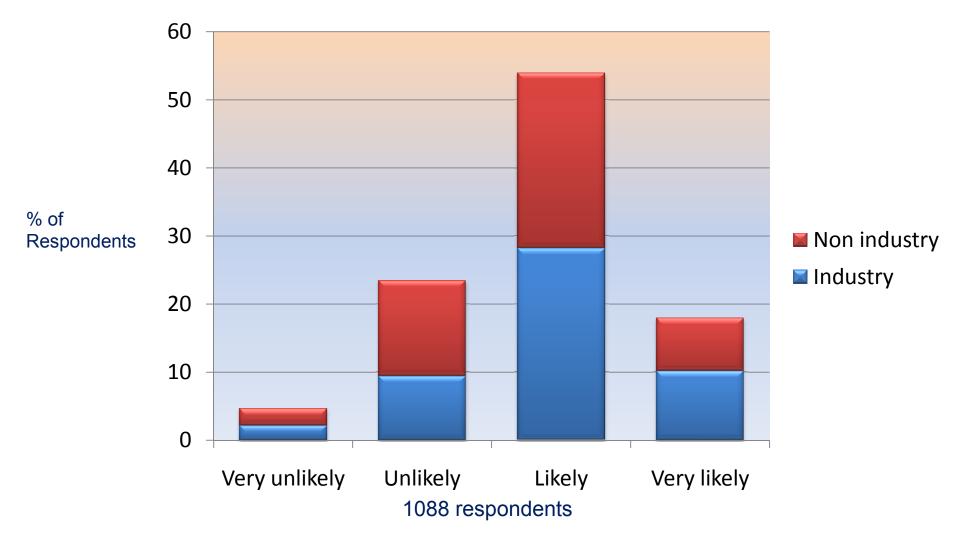
% of Respondents

7. Demand for Meetings

- Respondents were presented with three scenarios for how participant and exhibitor strategies might evolve in the period to 2020
- The majority expected organisations to maintain a strong commitment to live events with 74% saying it was likely or very likely that "Compared to today, in 2020 my company/organisation will still invest at least as much time and money in organising conferences and exhibiting at trade shows as they do at present." Not surprisingly this scenario gained more support from those in the meetings industry (77%) than those outside it (67%)
- There was strong divergence of opinion on a second scenario which proposed that "Compared to today, in 2020 my company/organisation will be unwilling to allow staff to travel to as many conferences and exhibitions in order to save time and money". While 46% overall said this was likely or very likely, it supported far more heavily by those outside the industry (57%) than those who earn their living from it (43%)
- The third demand scenario focused on alternatives, with 59% agreeing that it was likely or very likely that *"By 2020, my company/organisation will be investing far more money in alternatives to conferences and exhibitions than they do today."* Again, it may not come as a shock that this was supported by 71% outside the sector compared to only 51% within it

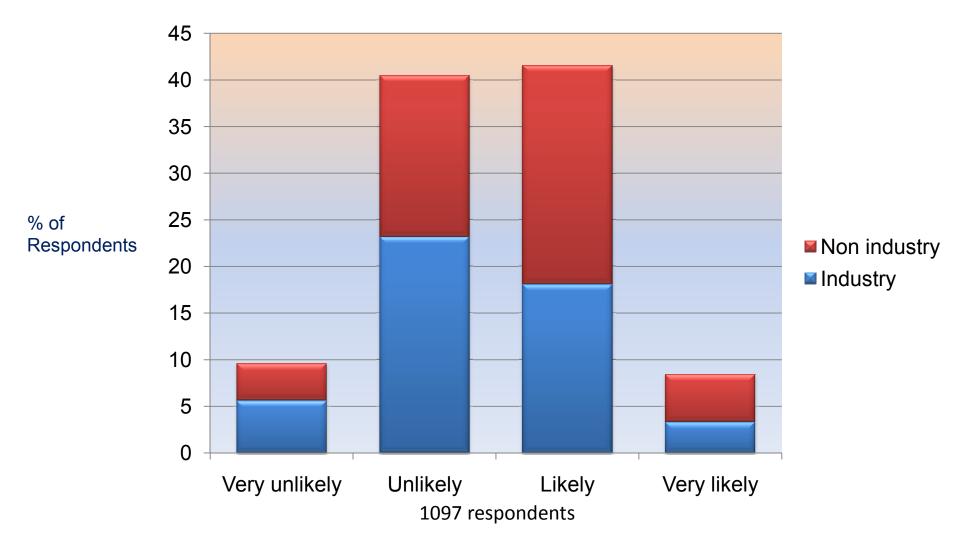
7.1 Will Investment in Meetings Hold Firm?

Compared to today, in 2020 my company/organisation will still invest at least as much time and money in organising conferences and exhibiting at trade shows as they do at present.



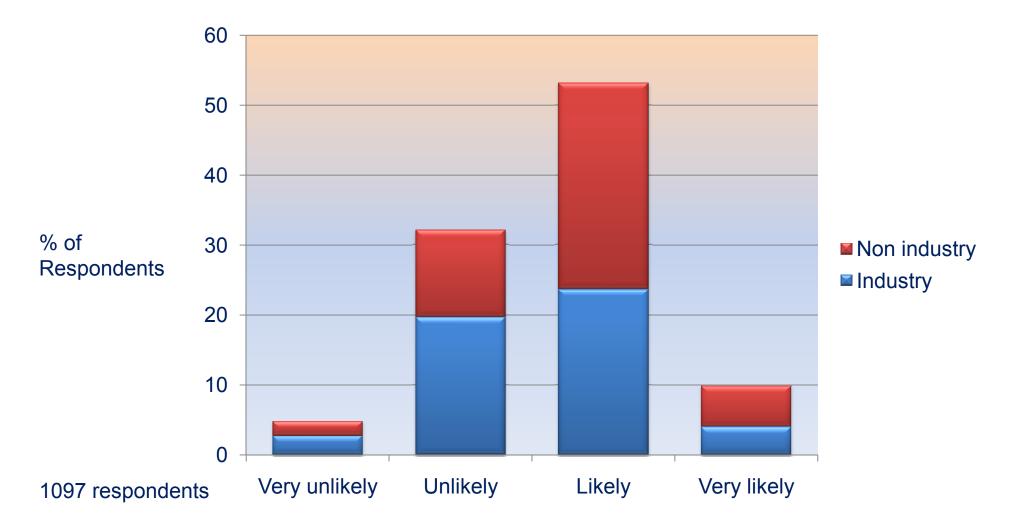
7.2 Impact of Time and Cost Pressures

Compared to today, in 2020 my company/organisation will be unwilling to allow staff to travel to as many conferences and exhibitions in order to save time and money.



7.3 Meeting Alternatives

By 2020, my company/organisation will be investing far more money in alternatives to conferences and exhibitions than they do today.

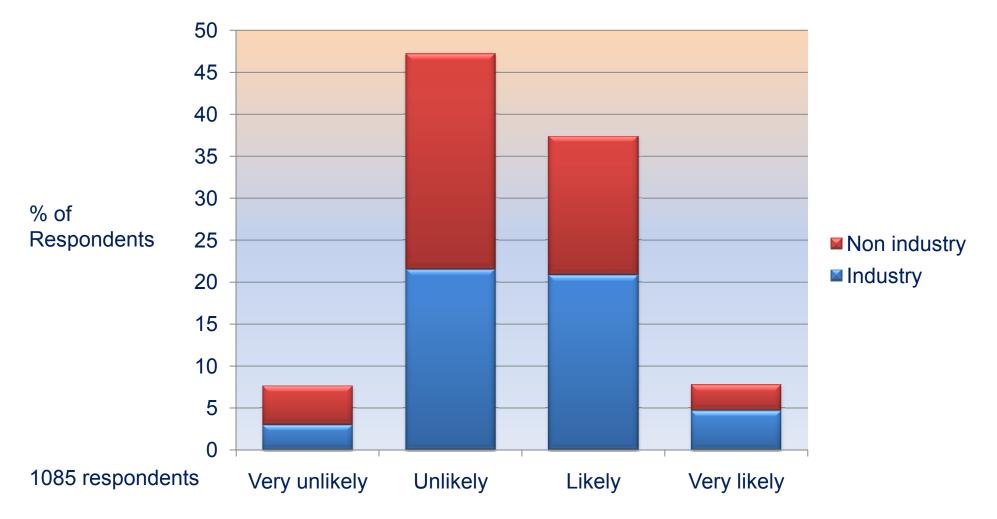


8. The Event Landscape

- Respondents were presented with three alternative scenarios for how the quantity and nature of events on offer by 2020 might evolve
- In many sectors such as the events industry itself there is growing pressure from end customers to rationalise the number of events. However, only 49% overall felt it likely or very likely that "By 2020, compared to today, I expect there to be fewer but larger conferences and exhibitions covering wide topics, industry sectors, or "communities of interest" with less choice of which events to attend, but much more choice within the events themselves." Somewhat surprisingly, this view was more heavily supported by those in the sector (51%) than those outside (39%)
- There was more widespread support for the counter scenario to that presented above with 79% saying it was likely or very likely that "*By 2020, compared to today, I expect there to be a greater choice of many more smaller, highly specialised conferences, exhibitions and meetings there will be much more competition from events wanting me to attend.*"
- The proliferation free or nearly free events promoted through platforms such as Meetup was starting to register as a challenge for the paid events sector. Overall 48% said was likely or very likely that "By 2020, there will be an explosion in the number of free or very low cost evening only meetings held in low cost venues such as libraries, wine bars, and schools." The scenario was supported by more outside the sector (54%) than within it (46%)

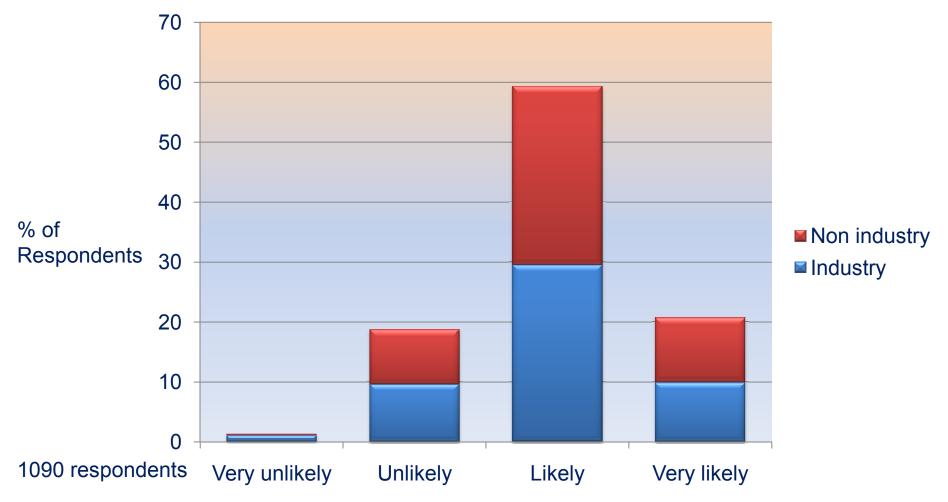
8.1 Less but Bigger?

By 2020, compared to today, I expect there to be fewer but larger conferences and exhibitions covering wide topics, industry sectors, or "communities of interest" - with less choice of which events to attend, but much more choice within the events themselves.



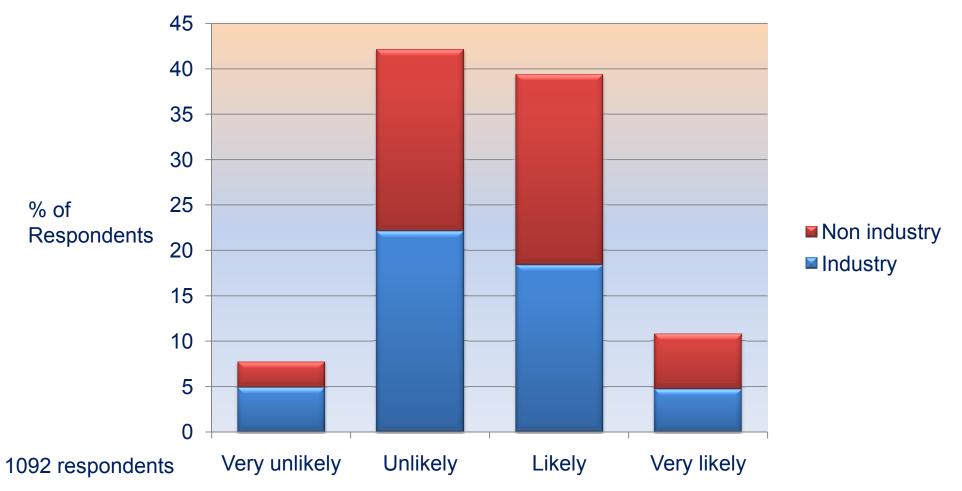
8.2 More, Smaller and Specialised?

By 2020, compared to today, I expect there to be a greater choice of many more smaller, highly specialised conferences, exhibitions and meetings - there will be much more competition from events wanting me to attend.



8.3 Free and Local?

By 2020, there will be an explosion in the number of free or very low cost evening only meetings held in low cost venues such as libraries, wine bars, and schools.

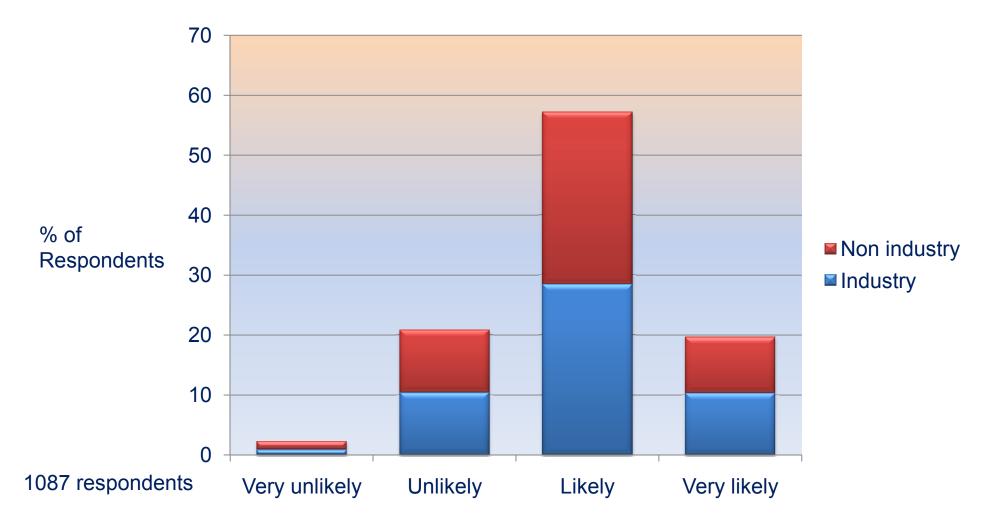


9. Event Business Models

- The drive to identify new business models is fuelled by a combination of the economic downturn, advances in technology and increased competition for events in many sectors. We asked respondents to evaluate five scenarios regarding business models in 2020.
- 77% across both respondent groups felt that it was likely or very likely that conferences and exhibitions would have to offer strong incentives to attract the right delegates
- 60% believe it likely or very likely that participants will want to pay based on the value they receive and that event owners will have to guarantee quantifiable returns on investment. The scenario was more favoured by those in the sector (62%) compared to those outside it (56%)
- 51% think it is likely or very likely that events will become more private and exclusive with far greater pre-event vetting of participants. This scenario was more favoured by those in the meetings industry (53%) than those in other sectors (43%).
- Both groups gave more support to the contra scenario with 64% saying it was likely or very likely that event marketing would open up to attract anyone who could add value
- There was widespread engagement with the notion that more transactions would be taking place at an event with 76% considering it likely or very likely that "*In 2020, conferences and exhibitions will include far greater opportunities to sample and purchase products and services than they do at the moment there will be vastly more business opportunities at conferences and exhibitions than there are today.*"

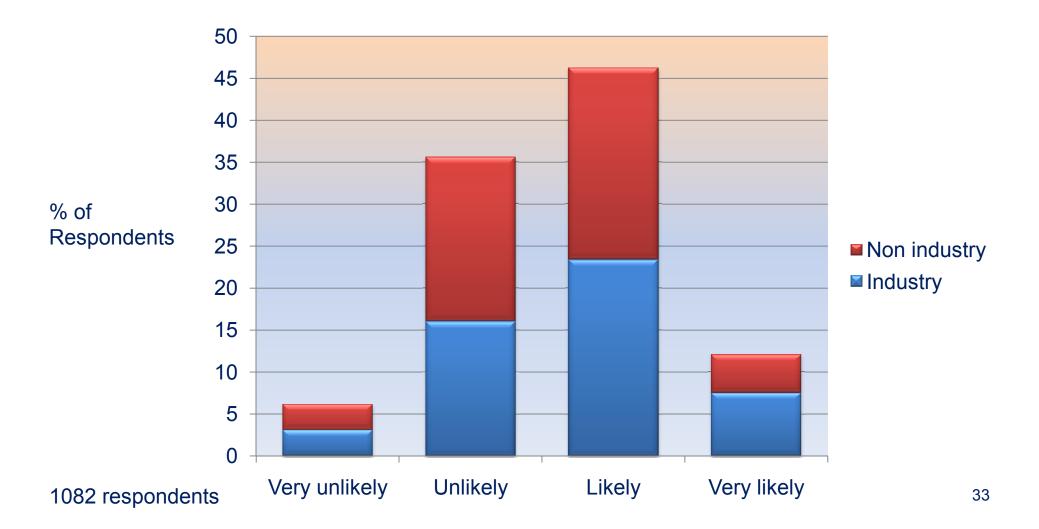
9.1 New Pricing Models

By the Year 2020 In order to attract the right sort of participants, conferences and exhibitions will have to offer strong price incentives (e.g. free attendance, subsidised travel to "buyers", sponsors pay for key senior delegates to be present).



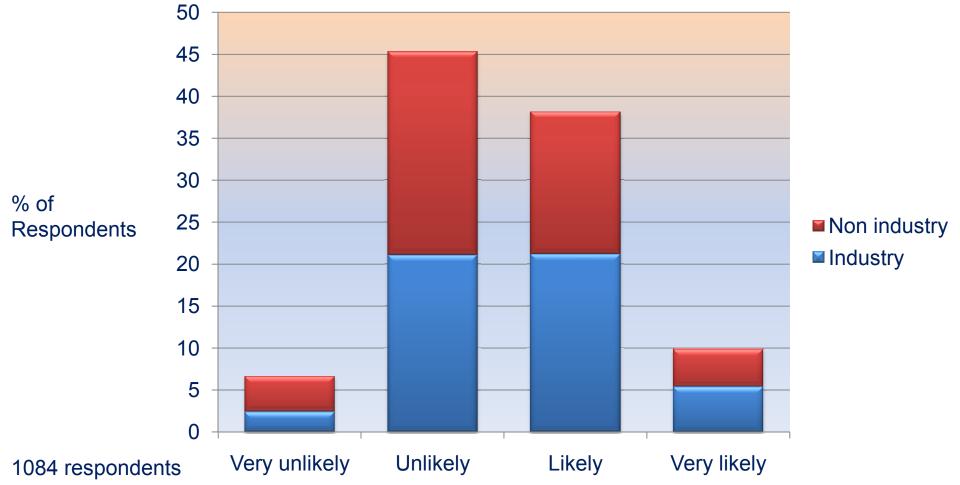
9.2 Pay as You Go

In 2020, participants at conferences and exhibitions will pay according to the returns they obtain from attending - e.g. sales appointments booked, individual education sessions attended. Organisers will have to guarantee quantifiable "returns on investment". Simply paying a flat fee to attend or exhibit will decrease in frequency.



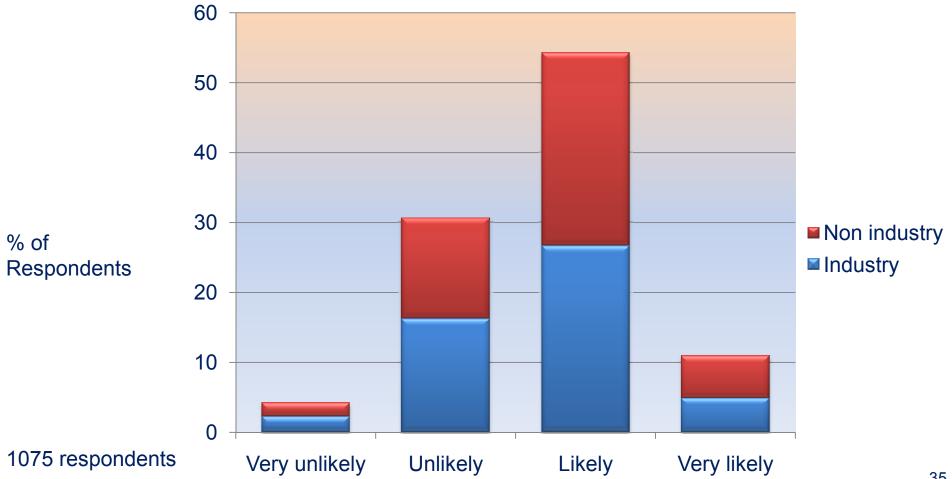
9.3 Private and Exclusive

In 2020, conferences and exhibitions will be far more "private" than they are today. Only properly qualified and pre-invited participants will be allowed in. There will be far more security checks and pre-qualifying conditions for many events.



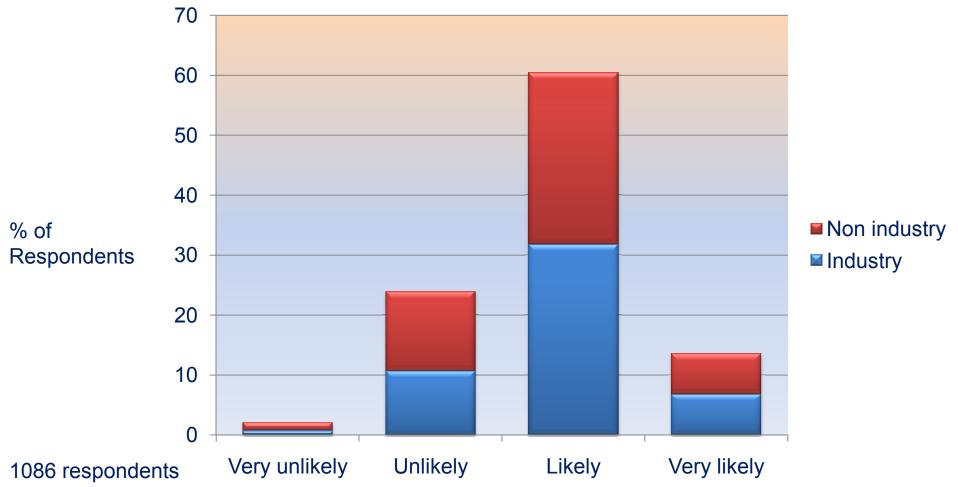
9.4 Open to All

In 2020, Conferences and exhibitions will be far more open and wide-ranging in terms of who is allowed to participate than they are today, bringing together any individuals who have any interest or involvement in the topic being covered. Event marketing will deliberately be designed to attract anyone who can add any value to an event.



9.5 Increasing Commercial Opportunities

In 2020, conferences and exhibitions will include far greater opportunities to sample and purchase products and services than they do at the moment - there will be vastly more business opportunities at conferences and exhibitions than there are today.



10. Event Technology in 2020

- Given the rapid pace of scientific advances taking place and the proliferation of experiential technologies in the marketplace, participants adopted a somewhat conservative stance when selecting those which would be most commonplace from a list of 14 possible technology advances by 2020
- The accompanying comments suggested this conservatism was partly due to a lack of awareness of the advances coming through and partly to a lack of faith that the emerging technologies would deliver on their promise or have a major impact on live events
- The three developments ranked highest were all ones which to a large extent are available today 'Live video streaming to remote participants' (75%), 'A social network before, during and after events' (70%) and 'All presentations, videos. etc.. downloaded to my mobile' (64%)
- Despite the widespread excitement and proliferation of augmented reality applications for smartphones such as the Apple iPhone, only 32% expected such technology to be in widespread use at events by 2020
- Interestingly, alongside augments reality, the other developments ranked lowest are amongst those which are generating the most excitement amongst the technology development community namely 'Remote attendees participating as 3D holograms' (33%), 'Every object has built-in intelligence and can interact with the people around it –e.g. chairs, walls, tables' (17%) and 'Intelligent avatars participating in virtual events on our behalf '(15%)

10.1 Event Technology in 2020 (%)

Which of these technologies do you think will be commonplace in conventions and exhibitions by 2020?

70 0 10 20 30 40 50 60 80

% of Respondents

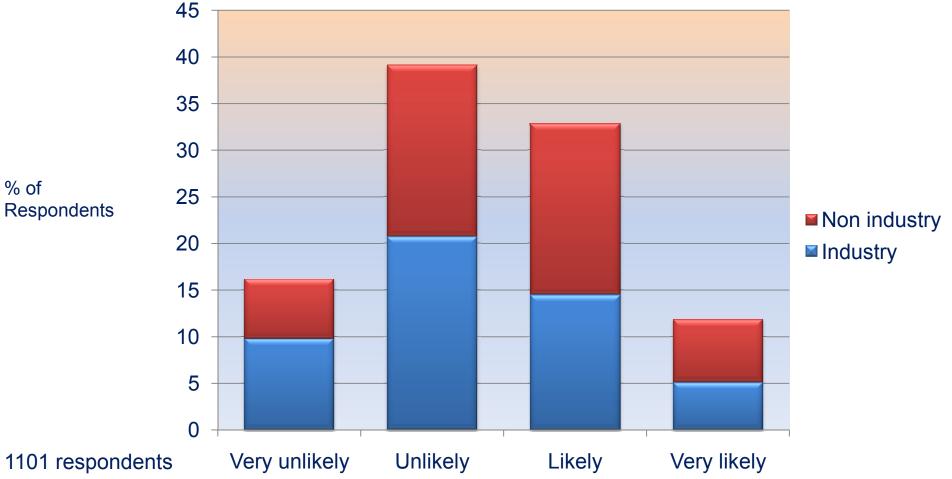
Live video streaming to remote participants A social network before, during and after events All presentations, videos. erc. downloaded to my mobile Event running in parallel in virtual meeting sites Technologies that stimulate all our senses Interactive display walls throughout the facility Use of display technologies such as 3D television 3D capture and replay of conference sessions Collaborative decision making Virtual reality Remote attendees as 3D holograms Augmented reality Every object has built-in intelligence Intelligent avatars participating in virtual events on our behalf

11. The Impact of 'Always On' Connectivity

- The mobile phone has become an indispensible tool in our daily lives and with over 4 billion phone owners globally, it has become the first truly ubiquitous technology. At the same time, the sale of smartphones are now outstripping those of laptops and the prospect of projection screens and keyboards for our phones heralds the possibility of the mobile phone replacing the laptop as our core computing device within a decade.
- With these developments in mind, we tested two scenarios on the survey respondents.
- The first asked whether, by 2020, the provision of information on demand any time and anywhere would replace the role of conferences and exhibitions in delivering such information. While 42% overall considered this a likely or very likely scenario, it was rated higher by those outside the meetings industry (50%) than those working within it (39%)
- The second scenario posed gained more widespread approval across all respondents, with 92% considering it likely or very likely that "In 2020, my ability to communicate, share data, and negotiate at any time and in any place with clients, suppliers, and business partners will be vastly greater and more efficient than today, thanks to technology."

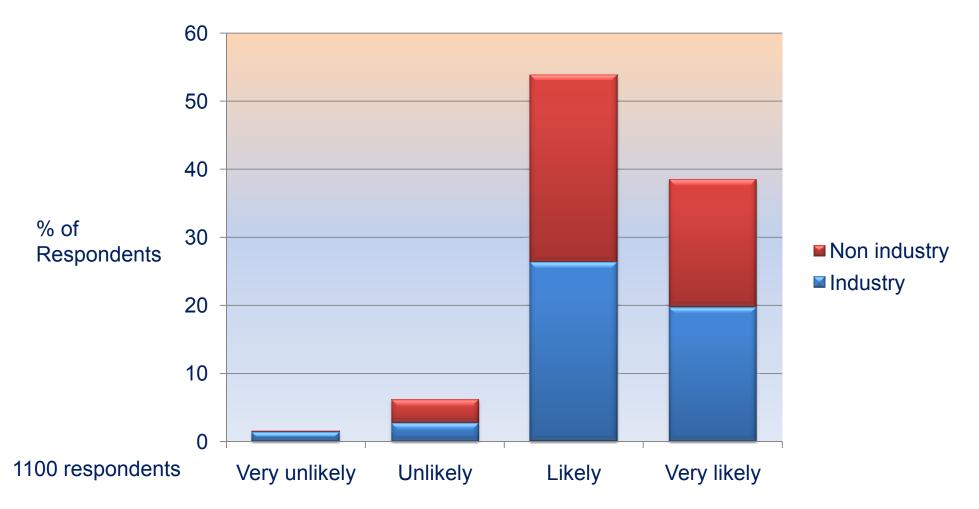
11.1 How Will 'IP Everywhere' Impact Events?

By the Year 2020 The latest mobile technology will allow me to access any factual information wherever I am located at any time. So I won't need to attend conferences or exhibitions to obtain this type of information.



11.2 Connected World

In 2020, my ability to communicate, share data, and negotiate at any time and in any place with clients, suppliers, and business partners will be vastly greater and more efficient than today, thanks to technology.

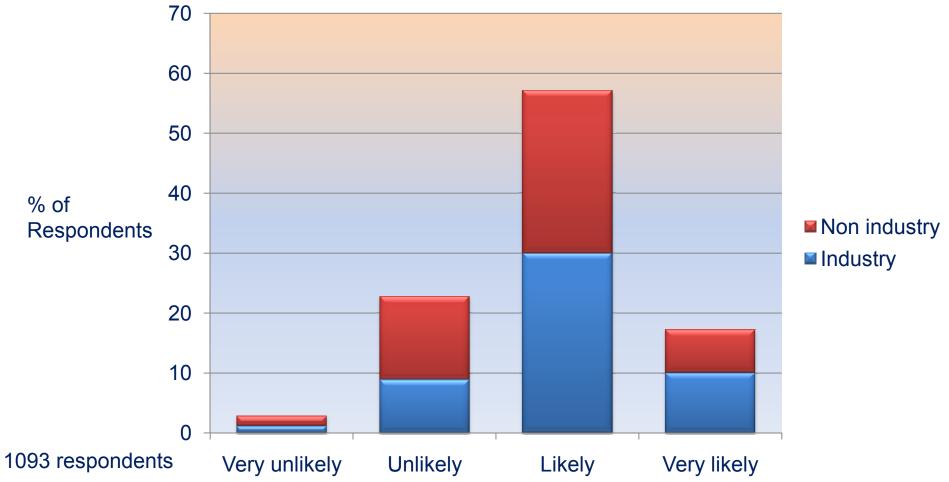


12. Personalisation

- One of the big opportunities being put forward for the industry is to use advances in visualisation and interactive experiential technologies to personalise the delegate experience. Three such scenarios were tested on respondents. In each case there was much greater support for these technologies when presented in the context of these applications than when simply listed as options in the earlier question (10.1).
- Those in the events sector were particularly attracted to the scenario that "By 2020 all conferences and exhibitions I attend will offer a totally personalised experience, tailor-made to my needs, and offering whatever technological tools are needed to make the event fully interactive so I can engage with and influence the content of the event." With 80% considering it likely or very likely compared to 69% from outside and 77% overall.
- 70% felt it was likely or very likely that personalisation would extend across the event experience and "In 2020, the personal comfort of attendees will be much more important to organisers than today. Individuals will be able to obtain personalised menus at meals, there will be many options for entertainment and relaxation, e.g. customised seating. Organisers will make far better use of information about individual attendees than they do today."
- Despite the obvious concerns over privacy, 93% considered it likely or very likely that "*In* 2020, almost everything that happens at events will be measured and stored as useful data for organisers and participants to use in real time, including sessions that individuals attend, interactions between attendees, appointments that are made and the educational and business interests that individuals express (before, during and after the event)."

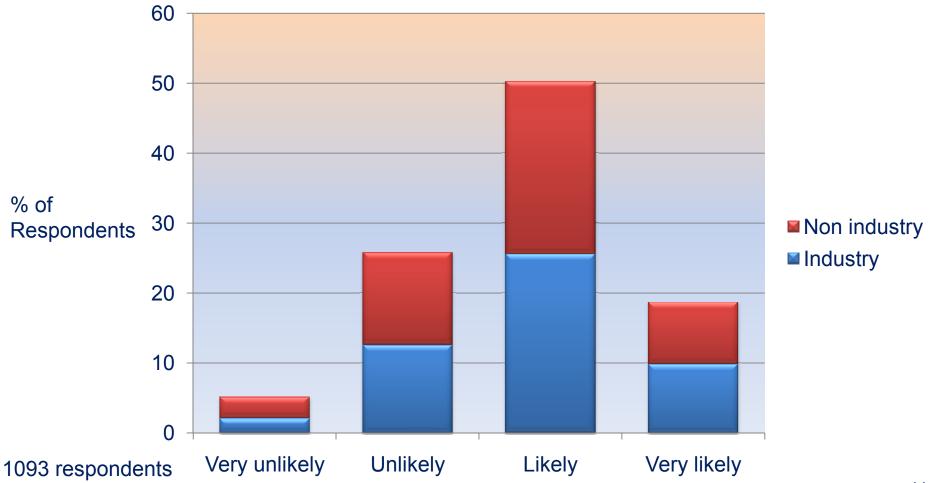
12.1 Technology Gets Personal

By 2020 all conferences and exhibitions I attend will offer a totally personalised experience, tailor-made to my needs, and offering whatever technological tools are needed to make the event fully interactive so I can engage with and influence the content of the event.



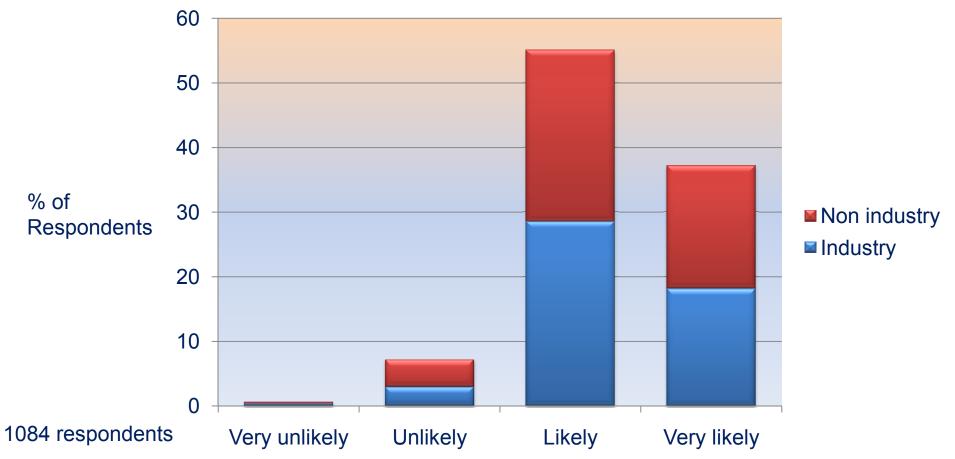
12.2 Total Customisation

In 2020, the personal comfort of attendees will be much more important to organisers than today. Individuals will be able to obtain personalised menus at meals, there will be many options for entertainment and relaxation, e.g. customised seating. Organisers will make far better use of information about individual attendees than they do today.



12.3 Full Event Capture

In 2020, almost everything that happens at events will be measured and stored as useful data for organisers and participants to use in real time, including sessions that individuals attend, interactions between attendees, appointments that are made and the educational and business interests that individuals express (before, during and after the event).

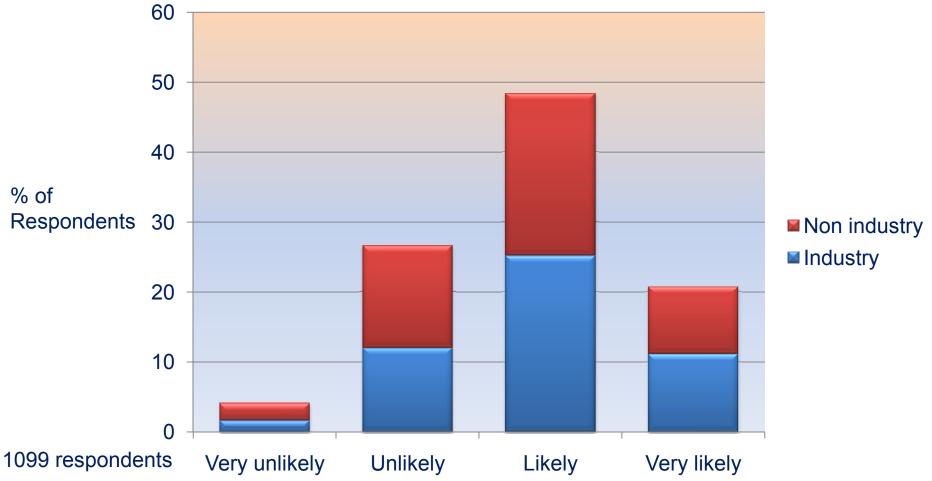


13. Hygiene Factors

- A common perception among respondents in their comments was that, issues such as ethics, reducing the environmental footprint and security would remain important considerations for attendees. Two scenarios were presented.
- 70% feel it is likely or very likely that *"In 2020, ethical and environmental decisions will play a big part in determining which events are attended (e.g. is the meeting environmentally sustainable; can the delegate justify the carbon cost of travelling to this destination)."* This scenario was given slightly more prominence by sector respondents (73%) than by those working in other industries (66%)
- An equal proportion of both respondent groups (55%) considered it likely or very likely that security would continue as a prime concern and that "*In 2020, those attending conferences and exhibitions will be even more concerned about personal security than today, and will avoid attending any events or destinations where there are perceived high risks.*"

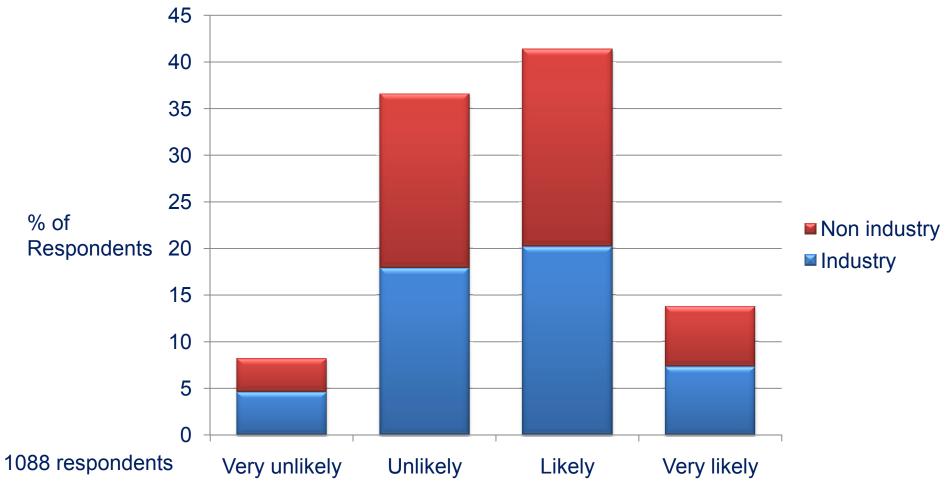
13.1 Ethical and Green

In 2020, ethical and environmental decisions will play a big part in determining which events are attended (e.g. is the meeting environmentally sustainable; can the delegate justify the carbon cost of travelling to this destination)



13.2 Security Conscious

In 2020, those attending conferences and exhibitions will be even more concerned about personal security than today, and will avoid attending any events or destinations where there are perceived high risks.

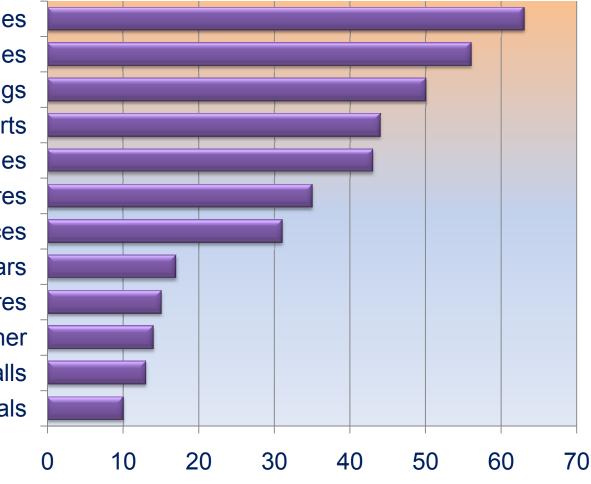


14. Convention Centre Challenges

- Convention centres face a number of competitive pressures in particular from the massive expansion of capacity taking place in the sector and from the growing number of alternative venues emerging, as entities as diverse as museums and church halls seek to generate additional income from their facilities.
- Respondents were asked to select multiple options from a range of facilities that could be competing with convention centres to host meetings, conferences and exhibitions by 2020. The three most popular choices were 'Schools, universities and colleges' (63%), 'Museums, galleries and libraries' (56%) and 'Meeting facilities in office buildings' (50%)
- The three most popular alternative uses for convention centres selected from a list of options supplied were Educational Institution (51%), Mixed Use Development (49%) and Museum / Gallery (45%). Only 4% felt they could be converted to Prisons and 3% to Domestic Housing.

14.1 Competition to Convention Centres

Which of the following do you think could be competing with Convention Centres to host meetings, conferences and exhibitions by 2020?

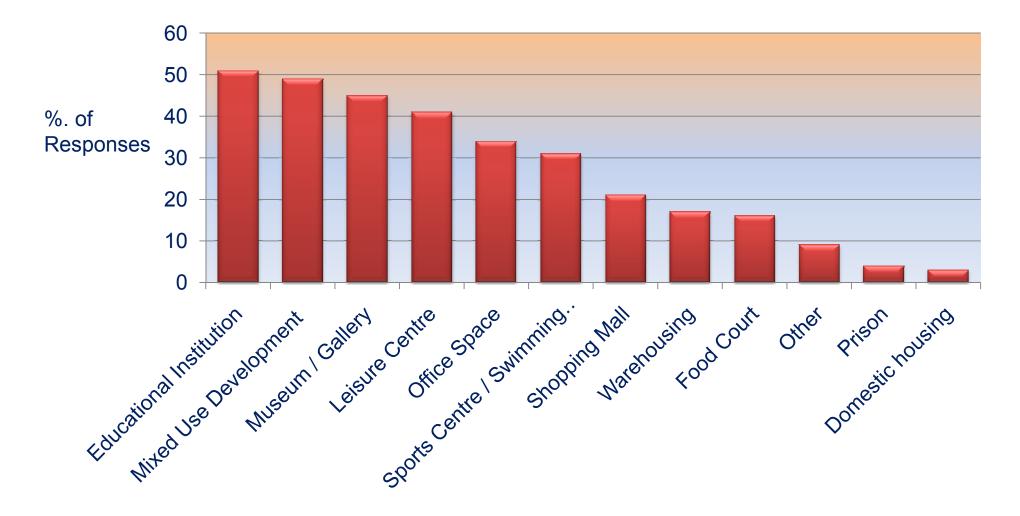


% of Respondents

Schools, universities, colleges Museums, galleries, libraries Meeting facilities in office buildings Airports Sports & Leisure facilities Cinemas and theatres Temporary venues in open spaces Pubs, clubs, restaurants, bars **Shopping Centres** Other Church halls Hospitals

14.2 Alternative Venue Uses

If your nearest convention centres had to find alternative uses for their space, which of the following do you think would be the most successful?

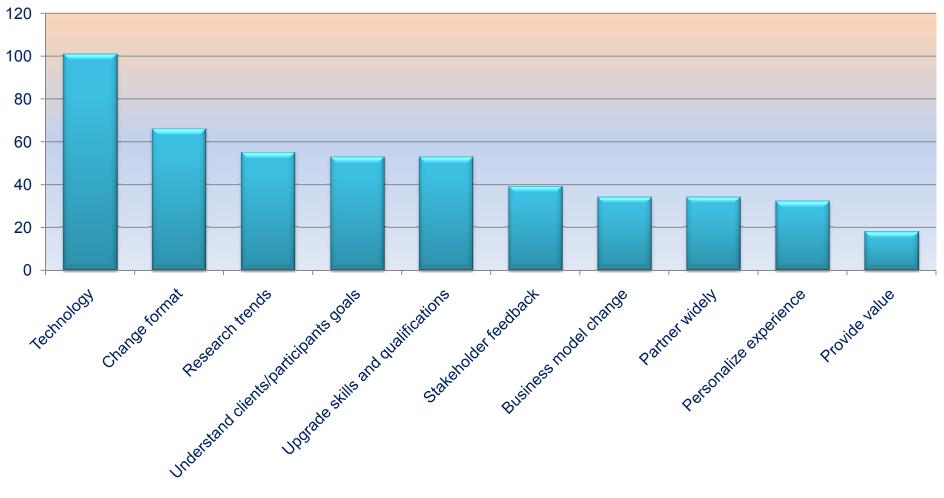


15. Preparing for the Future

- As a final set of questions, having considered the wide range of future scenarios put forward in the survey, respondents were asked to reflect on what event owners and venues need to do in order to prepare themselves for the market of 2020.
- For event organisers, the largest single group of comments focussed on the need to improve the use of technology before, during and after an event to maximise the delegate experience and improve the efficiency of their own operations and marketing. The next two most frequently raised issues were the need to innovate on event formats and to research and act on trends in the external environment, in their target markets and in the events industry
- For venues, the need to improve the technology offering and stay up to date or ahead of the curve received almost four times as many comments as any other issue. A common issue was the need to provide free broadband access. Many remarked that for modern day attendees charging them for broadband access was akin to charging them for the air, electricity or water used at the event.
- The next two most frequently raised issues for venues focused on the need for far greater flexibility. Firstly at an organisational level to address changing customer needs and secondly in terms of how the physical space can be configured to serve a constantly growing set of event design requirements.

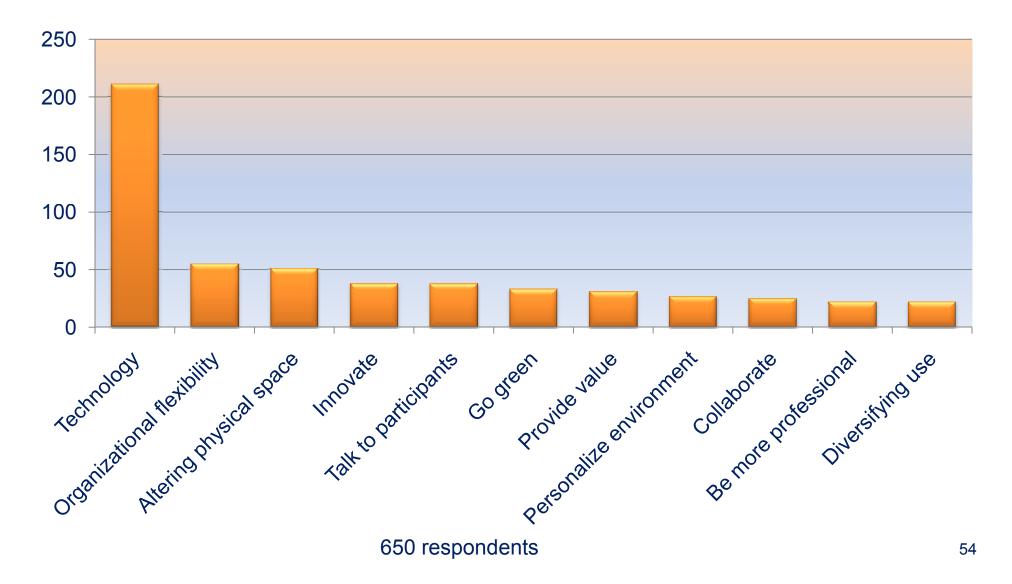
15.1 Preparation for 2020 - Events

What do you think event organisers should be doing today to prepare themselves for the market of 2020?



15.2 Preparation for 2020 - Venues

What do you think venues such as convention and exhibition centres should be doing now to prepare themselves for the conferences and exhibitions of 2020?



Topics for Further Research

A wealth of comments and issues were raised in the report which have helped identify themes and ideas for further research. Examples of the areas being explored include:

- Business 3.0 how business is evolving and the changing role of live events for the globally networked organisation
- *Free or Fantastic* the need for new event business models in hyper-competitive markets
- > *Micro-Payment* the rise of pay per session / per view
- Proving Value where next for ROI measurement?
- Education impact of the growing need and desire for lifelong learning
- Crossover what can the industry learn from the fields of art, design, leisure, entertainment and electronic gaming?
- Human 2.0 what are the possible implications for events of scientific advances that will improve our cognitive and physical performance?
- > **Better by Design** the evolution of meeting architecture design as a core event discipline
- Immerse Me how might the emergence of a range of immersive technologies change the event experience?

These topics and many others will be explored in future project reports and research papers

Conclusions

- The survey was the start point of the Convention 2020 study and was designed to stimulate new thinking and identify topics for further research
- The results highlight that demand for live events is expected to hold strong out to 2020, but to attract customers will require significant innovation in event formats, business models, organisational capability and the use of technology
- With an expected proliferation of smaller and more specialised events, convention owners and venues will need to develop a range of business models and event funding approaches to succeed in a hypercompetitive environment
- A far greater focus on 'enabling business' will be expected ranging from ensuring the right people are there to facilitating on the spot transactions and proving the return on investment
- Advances in science and technology will provide for far greater personalisation of the entire event experience and total immersion of delegates in the content of events. This is an area that could become a major differentiator – particularly for venues that can provide such 'total experience' solutions
- The next decade promises an uncertain economic climate where optimism and growth will be unevenly distributed across the planet, and where technology will offer an ever wider range of alternatives to live events. The challenge for the industry is to recognise the shifts taking place and embrace the need for innovation in event design and business models and to develop the professional capabilities required to survive and thrive in turbulent times.

Convention 2020 – Expert Contributors

Our thanks to the following experts who are providing valuable input and guidance to the Convention 2020 study

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If would like to know more about the Convention 2020 study and sign up for the newsletter please visit the website at www.convention-2020.com

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