PREDICTING THE MEETING ENVIRONMENTS OF THE FUTURE & IMPROVING MEETING DYNAMICS
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Now in its third edition, this report brings together insights from meeting planners, IACC members and industry experts from around the globe. Initially published in 2016 the IACC Meeting Room of the Future™ report provided an overview and foundational benchmarks on meeting industry trends. The 2019 report builds on the findings from both the 2017 and 2018 editions and also explores new topics that have emerged in importance.

Results from the 2019 report show many of the same opportunities and challenges as seen in previous years. Younger generations are playing a larger role in the industry – as both delegates and planners – and are significantly contributing to the evolution and expansion of the business events sector. Meanwhile, planners are continually required to do more with less. Budgets have generally remained flat while simultaneously the demand for unique experiences, advanced technology and enhanced food and beverage offerings is at an all-time high. As a result, those who arrange meetings and conferences are more critically assessing venues and elements that provide high impact experiences, with strong returns on investment.

The evolution of this research places a greater understanding on objectives and goals, and how these are projected to change. Data for the 2019 iteration of the report was obtained through a survey with the same as well as updated questions from previous reports. 250 meeting planners from five different continents provided their insight, helping identify and deliver key trends on what will be required in meeting environments of the future and to help venues respond to the following questions:

• How have the objectives and goals of meetings changed over time?
• In which areas will sustainable practices develop and change the way we hold events?
• What are the ideal physical aspects of meeting space and how have they changed over time?
• What will be the most critical technology – including cybersecurity needs over the next several years?
• Are venues responding accordingly to the desire for new and enhanced food & beverage offerings?

Those surveyed manage corporate, association and government meetings, training and conferences. A slightly higher portion of this year’s respondent pool, 20%, were third-party agency planners. Meanwhile, a slightly lower percentage of respondents, 42% of respondents – versus 54% in 2017 - dedicated more than 75% of their working time to meetings management, indicating that they may be increasingly asked to distribute their time across multiple divisions and tasks. Interestingly, 32% of respondents have less than 10 years’ experience in the meetings industry suggesting that younger generations may be increasingly influential in event planning and management.

This trends analysis will support meeting venues at a time of ongoing and increasing change by offering insights into the challenges and future needs of planners and delegates.

A decade after the beginning of the Great Recession, the meetings industry is settling into a new normal. Our global survey shows planners in many regions are planning more meetings, for more attendees and of longer duration. It is a story of a mature industry with expectations for incremental growth for meeting numbers, duration, and attendees – consistent across meeting types and regions.

- American Express 2019 Global Meetings and Events Forecast
The 2019 study could be encapsulated into one general theme, “the more things change, the more they stay the same”. Changes and advancements in technology, needs and motivations of incoming generations with tighter budgets across the industry continue to directly influence the objectives and goals, as well as how they are achieved. As has been the case in previous years, meeting professionals are ultimately under pressure to create memorable experiences and while the drivers largely remain the same, the tools and techniques to meet this objective are evolving.

The 2019 iteration of IACC Meeting Room of the Future™ found that in pursuit of creating memorable experiences, planners are looking to create the personal experiences for delegates through a variety of approaches.

• Ongoing adaptation of physical spaces to foster education, collaboration and communication
• Creating content in an engaging and immersive fashion
• Adapting to changing technological dependencies changes in the context of greater cyber security
• changing conference formats including sessions and breaks change by offering insights into the challenges and future needs of buyers and delegates.

The continued movement towards creating stronger event experiences means those arranging them, will take on a multitude of roles – from event and motivational ambassadors, to technology implementors and experts to food critics. As attendees strive for a different environment from their everyday life, planners are tasked with creating memories and transformative experiences that develops them both personally and professionally. Towards that end, the 2019 iteration of IACC Meeting Room of the Future™ provides insights and guidance to venues in order to better support their clients.
There are several key findings from this year’s report:

- **Younger generations** – serving as both delegates and planners – are increasingly influencing every event element. Studies have shown that this audience seeks more sensory stimulation versus more experienced and established generations and have short attention spans. Planners have adapted by modifying sessions to be shorter, more interactive and integrating new technologies. Simultaneously, planners caution against painting all delegates with the same brush as attendees are looking to be treated as individuals and not as a consumer segment.

- There is a greater emphasis on **ethical operations and sustainable practices**. Planners are understanding more the significant footprint that meetings and events have both environmentally and socially and are looking to venues to help reduce this impact. The area of food waste is just one example where planners are looking for improvements.

- New technology integration is critical, but not if it comes at the expense of protecting the **cybersecurity** of delegates. Planners have responded by adopting technology only when it truly contributes to the end goals and objectives. There is a willingness to outsource technology needs to the venue if it means more could be integrated without compromising security and if it allows other staff and volunteer resources to be freed up.

- Influenced by the need for more creative experiences, planners are not always turning to **large branded venues** and are instead considering smaller, more boutique options. To remain competitive, branded venues must demonstrate that they can offer the same level of flexibility and creativity that planners associate with specialist meetings focused conference venues.

- **Flexibility** continues to reign when it comes to meeting room design although **location and accessibility** of the venue is now of almost equal importance.

- Planners see changing needs when it comes to food and beverage offerings. While still confident in the ability for venues to meet tailored needs – if alerted ahead of time – venues that demonstrate **creativity in their food offerings** (including providing locally sourced options), a food waste management/reduction initiative, and flexibility in offering strong solutions for dietary restrictions and allergies will be preferred.
• The final decision on venue selection will ultimately be based on taking a **holistic look** at a venue’s offerings. As meetings become even more sophisticated, new elements will be considered and it will be important for venues to continue to take the pulse of meeting planners needs and objectives.

**How significant is the demand for creating unique attendee experiences at your events?**

- **38%** Increasing Substantially
- **12%** Not at all
- **2%** Decreasing Substantially
- **8%** Small Decrease
- **40%**
THE EVOLUTION OF MEETINGS

It’s Not Your Parent’s Meeting

An overarching theme of this year’s research is the impact that up and coming generations are having and will have. Younger generations are not only comprising an increasing share of delegates but are also a larger share of those planning meetings and events. To better understand the role and impact of younger planners and delegates, planners were again asked about the impact of future generations on the format of meetings.

A significant difference from the previous report findings is that younger generations are increasingly influencing and driving the need for experience enhancement at conferences, meetings and events. 80 percent of respondents report that younger generations place more emphasis on the overall experience of an event, second only to their interest in integrating new technologies. It is also understood that younger generations are programmed to expect constant stimulation and meeting formats need to reflect this by being more interactive, shorter and collaborative.

“Considering that millennials currently comprise the largest generation in the workforce, these findings shouldn’t be surprising, and this generation’s influence on the meetings and events we plan will only continue to grow. We’ll continue to see millennials drive the demand for educational and networking experiences as opposed to traditional conferences and meetings. It’s probably past time for us to begin discussing the impact of digital native Gen Z, as well,” according to Jessie States, CMP, CMM, director of the MPI Academy at Meeting Professionals International.
Because attendees have become used to it in daily life, everything is an experience. So they’re not content to just sit and absorb information anymore. Gen Y wants to be a part of inclusive yet exclusive groups by attending events (Stevens, 2019). While Gen Z wants to share their experience with their cohort, and Gen X is, let’s be real, bored, jaded, distrustful of authority and the corporate world, has “seen it all” and needs to be stimulated.

- Meeting Planner

**Processing & Reframing Information**

Building from a finding from 2017 which found that the visual stimulation is important in meeting spaces, one example of a successful technique is the process of capturing ideas and discussions pictorially. Having an artist drawing the session in the corner of the room, where attendees can reference the discussion visually is one approach. According to a report by Ink Factory, when delegates start using visual notes, you go beyond merely regurgitating information, and instead process and reframe information in their language, which leads to better information retention.

While there is evidence to support these general trends, it is also important to remember that individual preferences are also important. According to a survey from Selligent Marketing Cloud, 74% of consumers expect companies to treat them as individuals, rather than as part of a consumer segment (e.g. ‘Millennial’ or ‘suburban mother’). Therefore, in the coming years, it will be dangerous to stage events where you think of your audience as a collective. People want to feel valued individually and have experiences tailored to their individual needs and preferences. According to one survey respondent, “Today the requirements are for personal focuses and powerfully branded experiences. Five years ago, the focus was strictly on the brand and the attendees were expected to “go along”. No more, now the attendee experience and their involvement and connection to that brand are key.”

**Impact of Future Generations on the Format of Meetings**

- Increased integration of new technology (especially smart phone integration) - 85%
- More emphasis on the overall “experience” of a meeting or event - 80%
- Shorter attention spans requiring more interaction, collaboration, stimulation, etc. - 76%
- Shorter, quicker sessions replacing long-form presentations - 70%
- More emphasis on creativity - 55%
- Other - 3%
- They are not influencing meeting formats - 2%
Meeting Venue Elements

More than one-third of meeting planners continue to report the importance of flexible meeting space moving forward which closely aligns to findings from previous years.

It is well understood that venue elements have a significant impact on events and delegates. As was seen in 2017, there is agreement that meeting venue environments strongly impact how delegates interact, learn and communicate, resulting in increased productivity.

The overall venue environment will continue to be important as other aspects of the meeting landscape change. The American Express Global Meetings & Events Forecast reports the duration of conferences and meetings is lengthening. As a result, the need for a venue to offer a quality environment with variations to meeting settings and offerings becomes heightened.

Ethical and Sustainable Practices influence Venue Selection

In line with 2016 and 2017 findings, access to interactive technology will be the most important venue element moving forward. However, there are other notable differences in this year’s study. For the first time in 2019, ethical operations and sustainable practices were included and have taken 2nd place, greater than flexibility of meeting spaces which was the second most important element in the future in both 2016 and 2017. This is a significant trend as it provides evidence that meeting planners are conscious of their environmental and social footprint and want to reduce their impact moving forward.

Simon McMahon, General Manager of UK based Willows Training Centre and Woodlands Event Centre introduced this year, alternatives to traditional flipcharts and paper in all meeting rooms. SMART Kapp, uses app technology to capture everything written on a flipchart-like whiteboard, saving to the event app for future reference and delegate sharing.

Location & Access Factors Highly

New this year is the consideration of location and access which is projected to become increasingly important by 35% of respondents. Location and access align closely with the trend of planners increasingly called on to do more with less but still generate memorable experiences for delegates.
Impact of Venue Elements Today (1=strongly disagree, 10=strongly agree).

Meeting venue environment significantly impacts how delegates interact, learn and communicate 8.8
Meeting room and supporting spaces influence delegate productivity 8.7
Meeting room and supporting spaces influence delegate creativity 8.5
Meeting room art/design elements have a motivational influence on delegates 7.9

Meeting Venue Elements More Important in the Next Five Years

Access to interactive technology (i.e. audience participation, collaborative communication) 66%
Ethical operations and sustainable practices 44%
Flexibility of meeting space (ability to move furniture etc.) 38%
Location and access 35%
The food and beverage offer (service styles, presentation and quality) 29%
Access to authentic local area experiences 23%
Networking spaces adjacent to the meeting/event space 20%
Sustainable practices 17%
Availability of team building activities 7%
Acoustic friendly environment 3%
Other 2%
Experience Creation is Here to Stay

Experience creation requires a holistic approach to meeting planning and, as seen in this year’s survey findings, requires new and unique technological, food and beverage and physical elements to create the more intangible “feel” of an event. The importance of experience creation has continued to rise and is not expected to decrease in the near future.

Experience Creation Is More Important Now Versus Five Years Ago

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>True</td>
<td>85%</td>
<td>80%</td>
</tr>
<tr>
<td>False</td>
<td>15%</td>
<td>20%</td>
</tr>
</tbody>
</table>

With shorter attention spans and higher expectations, delegates today are looking for high impact memorable experiences. The role of the meeting planner is following suit. This year, 85 percent of meeting planners report their current role in planning meetings involves more experience creation, a 10 percent increase from 2016, growing every year since this report began. Evidence continues to show that this trend continues to be largely driven by the expectations and demands of incoming generations. 80 percent of respondents report that incoming generations are placing more emphasis on the overall “experience” of a meeting event, second only to their desire for increased integration of new technology.

Alan Corlett, Group Commercial Director of De Vere in the United Kingdom sees this growth through interactions with their clients “Many more of our RFP’s now state the need of experiences, use of outdoor spaces and are assessing some of the venues qualities based on what they offer up as suggested ideas, rather than the client specifying explicit needs themselves”. Alan further reports that combining collaborative space with imaginative food and beverage, highlighting local provenance, ethnicity and sustainability is going to become more important in the coming years.
In order of importance, meeting planners report this new cohort of delegates are looking for or are influencing meetings in the following ways:

1. Increased integration of new technology (especially smart phone integration)
2. More emphasis on the overall “experience” of a meeting or event
3. Shorter attention spans requiring more interaction, collaboration, stimulation etc.
4. Shorter, quicker sessions replacing long-form presentations
5. More emphasis on creativity

**Planners Seek To Outsource Key Elements**

With expectations rising and resources largely remaining constant, meeting planners are looking for ways to effectively reduce their workload and are increasingly open to sharing their roles and responsibilities. Over 50% indicated their willingness to outsource:

- Event technology (not included in 2017 survey but surpassed off-site activity arrangements in 2019)
- Off-site activity arrangements
- Digital media capture (i.e. video streaming, social media)
Venue Elements Planners Consider Outsourcing

- **Event technology**: 58% in 2019, 56% in 2017
- **Off-site activity arrangements**: 56% in 2019, 63% in 2017
- **Digital media capture (i.e. video streaming, social media)**: 54% in 2019
- **Sourcing of local services (i.e. entertainment, printing)**: 48% in 2019, 56% in 2017
- **Production services**: 37% in 2019, 33% in 2017
- **Audience participation/collaboration tools (i.e. Slido)**: 31% in 2019
- **Housing management**: 26% in 2019, 33% in 2017
- **On-site registration**: 24% in 2019, 28% in 2017
- **Participant registration**: 15% in 2019, 20% in 2017
- **Post-event feedback**: 16% in 2019, 18% in 2017
- **Education components**: 8% in 2019, 18% in 2017
- **None**: 7% in 2019, 9% in 2017

*Not all categories included in 2017 – data shown when possible*
Meeting professionals continue to agree on the growing emphasis on delegate education and networking. These two trends will be the foundation for measuring return on investment and providing justification for the expense of experiential events to key decision makers. Leading planner association MPI has developed a formula for measuring the ROI of learning and networking; once considered unquantifiable, many companies are finding unique ways to identify quantitative means for calculating business value.

**Big Brands Venues Influence on Meetings**

Whilst a major brand may appear to be the safer option, meeting professionals are carefully assessing the standards and capabilities of venues prior to booking events as well as considering how a major branded venue will contribute, or hinder, the penultimate goal of creating a memorable experience. Responses to this year’s survey shows that there are varying opinions on how planners view major hotels or venue brands. 55 percent of respondents (similar to 2017 findings) report that a major hotel or venue brand gives confidence and reassurance that the meeting product and services will be of a high standard. This still leaves a significant percentage of respondents unsure of this outcome.

When asked how they believe major branded venues (Hilton, Marriot Hyatt, etc.) influence meeting elements, meeting professionals indicate that in general branded venues had positively influenced venue elements such as food and beverage quality, meeting space design, and technology. When it came to creativity, more than 50% report major brands have little or no influence. In order to compete on the experience creation front, branded venues must demonstrate that creativity will be positively impacted for events held at their venues.
Impact of major branded venues (Hilton, Marriott, Starwood, etc.) influence the following meeting aspects

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Positively</th>
<th>No Difference</th>
<th>Negatively</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>56%</td>
<td>36%</td>
<td>8%</td>
</tr>
<tr>
<td>Flexibility</td>
<td></td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>Meeting Space Design</td>
<td>47%</td>
<td>39%</td>
<td>13%</td>
</tr>
<tr>
<td>F&amp;B Quality</td>
<td>43%</td>
<td>48%</td>
<td>10%</td>
</tr>
<tr>
<td>Creativity</td>
<td>28%</td>
<td>52%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Declines in using Major Branded Venues

It appears that the lack of creativity at branded venues and the potential impact on experience creation is being noticed by planners. A significantly lower percentage of planners (47 percent) report that they are holding events in major branded hotel venues versus 62 percent in 2017. According to one survey respondent, this could be attributed to the fact that “Groups are wanting more space for networking and social events, breakouts, etc. whereas hotels are wanting to give a lot less space and make meetings more compact.”

Meanwhile, planners appear to instead to be turning to independent venues such as conference centres/centers or meeting and training focused venues and numerous industry reports cite that planners for smaller meetings are gravitating to venues which offer environments which are more boutique and home-like.
The reduction of planners using large brand hotels from 61.9 percent in 2017 to 47 percent in 2019, is a considerable shift in behaviour. The continued development of quality urban meetings focused day venues, providing an alternative to hotel multi-purpose function rooms is highly likely to be one major contributor. Additionally, the link between independent and small group venues ability to offer creative elements for meetings, may also be an influencing factor.
Meeting Space Requirements Now and In the Future

This year’s report shows that the high importance of select physical elements of meeting venues have largely remained the same over time and are projected to continue to be important moving forward. Those elements deemed most critical to the success of meetings include the availability of high-quality broadband, effective meeting room lighting and good meeting room acoustics.

As meeting planners work hard to create engaging experiences, networking space and flexible layouts have maintained their importance however, access to outdoor areas has gone down slightly in importance.

As planners look five years into the future, these fundamental meeting room features will maintain their importance however, planners also foresee more importance to be placed on meeting room elements that reflect ethical and sustainable practices.

As the skills we need to train evolve then the spaces need to reflect that. Who would have thought that mindfulness would be a business tool and we would need spaces for yoga etc. The more formal training is old fashioned and we need to be able to plan for what may come in the future.

- Meeting Planner
Jeff Loether of Electro Media Design notes that venues and meeting planners can use portable technologies to supplement or compensate for poor lighting, Wi-Fi, sound & video. But fixing poor acoustics is extremely difficult unless you put headphones on everybody. Background noise, reverberation & echoes, and poor isolation from adjacent spaces, for example, can have negative effects on meeting room acoustics. Good acoustics must be baked into the room and systems design from the beginning or during renovations.

**Physical Elements of Meeting Venues – 2019 vs. 2017**

<table>
<thead>
<tr>
<th>2019</th>
<th>2017*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of high-quality internet is important in meeting venues</td>
<td>9.5</td>
</tr>
<tr>
<td>Meeting room lighting impacts the attendee experience of the meeting/conference</td>
<td>8.8</td>
</tr>
<tr>
<td>Meeting room acoustics impact the attendee experience of the meeting/conference</td>
<td>8.7</td>
</tr>
<tr>
<td>It is important to have plenty of networking spaces outside of the meeting room for informal gatherings</td>
<td>8.2</td>
</tr>
<tr>
<td>It is important to have the flexibility to change layouts in meeting rooms during the day</td>
<td>8.1</td>
</tr>
<tr>
<td>It is important for a venue to offer ethical operations and sustainable practices</td>
<td>7.9</td>
</tr>
<tr>
<td>I am looking for different meeting space environments today than I was five years ago</td>
<td>7.4</td>
</tr>
<tr>
<td>It is important to include the use of outdoor areas in my meetings</td>
<td>7.1</td>
</tr>
<tr>
<td>I anticipate the need to run more events where the venue does not need to offer accommodation as well as meeting space</td>
<td>5.6</td>
</tr>
</tbody>
</table>
What’s Your Dream Venue?

When asked to describe the physical characteristics of their ideal meeting venue in five words, there is little variation from previous reports. In describing the ideal venue, meeting professionals mentioned the following words most frequently

1. Open
2. Flexible
3. Bright
4. Fun
5. Well-equipped with technology

The most notable differences from previous years was the desire for physical spaces to foster a sense of “fun” likely to aid in the creation of memorable experiences. In line with other findings, the need for a room that is well-equipped from a technology perspective is also high on the list of demands.

Jennifer Vander Molen of Steelcase Event Experiences feels as though there are questions to ask around space. “Our research shows that there are five key questions to ask around space, especially space where people work at events. These questions are:

- Am I comfortable?
- Can I focus when I need to?
- Do I have both personal space and access to the things I need, like power?
- Do I feel safe and relaxed?
- Can I get things done?

When these needs are met, there’s an immediate connection to the engagement, productivity, and comfort of the event attendees”.

When presented with several options of room types and asked to rank their likelihood of using the room type (on a scale of 1=not likely to 10=highly likely) meeting planners were most likely to use flat-floored meeting rooms that offer more flexible layout, or rooms offering home-like lounge style informal seating. Auditoriums and tiered meeting or lecture rooms are out of favour with planners.
“The increasing role that social learning plays in the design of educational delivery cannot be overstated,” said Jessie States from MPI. “Adult learners gain context from the experiences and knowledge of their peers, and meeting professionals are asking for spaces that can help them to facilitate that sharing process in an organic way.”

According to one U.S. meeting planner, “Some groups are changing the type of setup they enjoy. We’ve had several (move) from U-shaped setup to crescent rounds because they feel it is more interactive. Meeting space with built-in projection at a reasonable cost is attractive so that we have a more professional setup without having to lug our own equipment”.

**Social Spaces Outside of the Meeting Room and the Linger Effect**

Lounge settings at events promote what Steelcase calls “The Linger Effect”: Long after the planned event concludes, we observe attendees remaining in these comfortable environments — continuing intriguing discussions, sharing information, and having meaningful conversations. This serves as a confirmation that attendees experience a positive emotional connection in the space.

**Preferred Meeting Room Type**

- Flat-floored meeting rooms (flexible layouts) 8.9
- Rooms offering home-like lounge style information seating 7.5
- Rooms full of colour and design features to inspire (maybe at the expense of some comfort for acoustical qualities) 7.0
- Rooms with no natural daylight 4.8
- Auditoriums (fixed desks and seating) 4.8

In the future access to high quality internet service will take precedence over outdoor meeting spaces. When asked how strongly they agree with the statement “Access to higher quality internet will become more important in the next five years” (on a scale of 1=strongly disagree to 10=strongly agree), meeting planners provided an average rating of “9.3,” up from 8.9 in 2017.
In some cases, venues report that small break out rooms are being replaced with communal co-working spaces, without walls and doors. Delegates don’t want to feel sequestered in smaller spaces, closed off from other work spaces.

**Human-Nature Connection**

Steelcase conducted research into the connection between nature and meeting spaces. Their research highlights that human-nature connection is something that all humans innately crave. They found that elements like fresh air, lush greenery, and natural lighting go a long way to re-charging event participants, increasing productivity and improving overall wellbeing.

Jennifer Vander Molen of Steelcase Event Experiences adds “For meetings and events, we can embrace biophilic design by exploring nature-inspired materials, incorporating greenery, and integrating modern, unique lighting elements.”
**Interaction, Education & Communication**

The need for technology advancements to keep engaged and interacting with meeting content is more important than ever, largely driven by the rise of increasingly tech-savvy delegates. Meeting planners are continuing to look for ways to implement technology that boosts delegate interaction, education and engagement and there is no sign that this need will go away anytime soon.

**Hybrid Events can Frustrate and Hinder**

In general, when certain technologies were implemented, it generally aided communication and overall flow of the conference. The one exception to this is technology that enables remote participants to join the conference. When implemented, 11 percent of respondents reported that it hindered communication, indicating a growing level of frustration with hybrid events.

Etc.venues report seeing a growing desire from meeting planners to create immersive brand experiences for attendees. Large video walls, RGB lighting reflecting a brand’s corporate colours, and walls – or even floors – are being utilised with imagery to reinforce a client’s corporate identity. “For the larger meetings this is becoming a critical factor in selection.” Adam Simpson says. “Our own branding is subtle. After all, the space is there to build our clients’ brands, not ours.”
## Implemented Technology and Impact

<table>
<thead>
<tr>
<th>Implemented Communication</th>
<th>Hindered Communication</th>
<th>Did Not Implement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology that enables remote participants or remote presenters to join the conference</td>
<td>51%</td>
<td>11%</td>
</tr>
<tr>
<td>Social media campaigns</td>
<td>57%</td>
<td>6%</td>
</tr>
<tr>
<td>Screen sharing technology</td>
<td>40%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>90%</td>
<td>5%</td>
</tr>
<tr>
<td>None of the above</td>
<td>89%</td>
<td>3%</td>
</tr>
<tr>
<td>Live slide sharing (to allow participation with information about the conference, catering, topics, etc.)</td>
<td>71%</td>
<td>6%</td>
</tr>
<tr>
<td>Live event streaming</td>
<td>49%</td>
<td>8%</td>
</tr>
<tr>
<td>Digital signage (digital displays with information about the conference, catering, topics, etc.)</td>
<td>57%</td>
<td>4%</td>
</tr>
<tr>
<td>Conference apps</td>
<td>62%</td>
<td>8%</td>
</tr>
<tr>
<td>Beacon/GPS delegate tracking</td>
<td>83%</td>
<td>6%</td>
</tr>
<tr>
<td>Audience participation/audience response/social Q&amp;A</td>
<td>71%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Virtual Venue Site Inspections

Technology that allows planners to do more with less is showing an increase in adoption. For instance, when asked if respondents would be willing to replace in-person site visits with virtual tours, 22% report that they are already doing so or would be willing to do so. 32% percent are not sure but in general, adopting virtual tours could result in a significant savings in time and money. It is encouraging to see the majority either using or potentially open to this approach, which carries environmental benefits.

Sandy Hammer of All Seated, a pioneering company developing virtual reality venue tours, is optimistic that the use of VR to appraise venues for suitability is going to rise significantly. A believe supported by outperformance in VR sales across all industries. “In 2018 virtual reality (VR) hardware actually outperformed optimistic sales expectations last year. The research company SuperData Research reports that annual VR revenues in 2018 reached $3.6 billion — higher than the 2018 forecast of $3.3 billion. Furthermore, 82% of companies implementing AR/VR indicate that benefits exceed expectations.”

evc.venues reports event stronger adoption of VR tours. Adam Simpson says “meeting planners are busy people and site visits can be time-consuming. Whilst planners still want to see the real space they no longer feel the need to bring in the key stakeholders for additional visit as they can use our VR tour to achieve the same buy in.”

Data Security

In 2016, the security of data was highlighted as important and subsequent studies have reinforced the importance. This year, 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, a 0.5 increase from 2016, for the statement “security of my data will become more important in the next three to five years at meeting venues.”

Reinforcing the importance of cyber security, when asked the question “Which technology are you least comfortable implementing due to its failure rate?”, overwhelmingly respondents reported any technology which comprised the security of attendees.
One of IACC’s members in the UK, De Vere, reports a significant increase in request for dedicated internet and Wi-Fi from their clients in the last 12 months and expects demand to rise further in the coming years.

Mark Cooper, IACC’s CEO believes it may take just one major breach at a conference, such as a political event where the repercussions are serious and worlds media are watching on, for a spotlight to be shined on cyber risks at conferences.

Taking Unacceptable Risks?

Matt Harvey, Vice President of Internet Services at PSAV feels that most venue networks only have base level protection similar to that of a home router. “Events are vulnerable to a variety of cyber-attacks that can occur both prior to and during an event so companies will need to take a holistic approach to security that addresses each type of threat. Venue network operators will be faced with the escalating challenge of improving security without diminishing the ease of connection which is also key to a smooth-running event.”

Guaranteed & Free Broadband

Meeting planners, once again, agree that their dependency on internet/Wi-Fi at a venue has increased, and will continue to increase in the next five years. Approximately 44 percent of meeting planners, indicated that they would not even consider shortlisting a venue that did not have the guaranteed internet

<table>
<thead>
<tr>
<th>Importance of Cyber Security (1=extremely disagree; 10=extremely agree)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cyber security will become a greater priority in the next 3-5 years.</td>
</tr>
<tr>
<td>Cyber security is a concern when implementing new event technologies</td>
</tr>
<tr>
<td>Cyber security at my events is considered when sourcing the venue</td>
</tr>
<tr>
<td>I have a cyber security brief that I share with the venue and contractors</td>
</tr>
<tr>
<td>I have had to deal with cyber security issues in past events.</td>
</tr>
</tbody>
</table>
According to David Fitzgerald at Barco, their research “Trends in Hospitality – Wow guests and Drive Returning Business with AV Technology”, showed that 61% of meeting planners surveyed said that the availability of video walls positively influenced their likelihood of returning to the venue in future.

These results showed that internet is vital to delegate experience. According to Matt Harvey “dedicated bandwidth was mentioned as important (and it is) however, it’s still not offered by as many venues as it should be. While good quality attendee Wi-Fi (free or affordable) is a baseline expectation, there is also a higher level of expectation (dedicated bandwidth, security considerations etc.) that venues need to provide the infrastructure for. It will be important that in the pursuit off offering free attendee Wi-Fi venues don’t overlook the higher-level needs expected by planners and delegates.”

“It’s particularly important for meeting professionals to understand the technological habits of their attendees and know on average how many devices they rely on that need to be connected. The burgeoning wearables marketplace may soon have significant impact on not only the experiences we design, but the number of devices that our participants rely on,” according to Jessie States from MPI.

Tasks Requiring Increased Internet Bandwidth – 2019 versus 2017

<table>
<thead>
<tr>
<th>Statement</th>
<th>2019</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone Audience Participation</td>
<td>79%</td>
<td>86%</td>
</tr>
<tr>
<td>Conference Apps</td>
<td>79%</td>
<td>84%</td>
</tr>
<tr>
<td>Delegate Email and Internet Access</td>
<td>65%</td>
<td>83%</td>
</tr>
<tr>
<td>Video Streaming Presentation Content</td>
<td>63%</td>
<td>76%</td>
</tr>
<tr>
<td>Live Event Streaming</td>
<td>63%</td>
<td>66%</td>
</tr>
<tr>
<td>Virtual Attendees</td>
<td>50%</td>
<td>68%</td>
</tr>
<tr>
<td>Online Learning</td>
<td>49%</td>
<td>57%</td>
</tr>
<tr>
<td>Video Streaming to Delegate Devices</td>
<td>40%</td>
<td>50%</td>
</tr>
<tr>
<td>Augmented/ Virtual Reality</td>
<td>38%</td>
<td>27%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Virtual & Augmented Reality

Approximately 38 percent of planners believe that internet bandwidth will be increasingly important in the next five years to accommodate tasks requiring virtual and augmented reality. While planners are aware of the potential that AR or VR could provide, there is still considerable uncertainty on how the technology can be implemented.

As one respondent reports, “I would love to incorporate VR/AR into my group’s meetings, but not sure if it will be possible until costs become more affordable.”

As planners continue to implement the new technology at meetings now and in the future, two key questions will be essential in guiding which technology to invest in.

1. What problems are we looking to solve for delegates?
2. How will this help achieve our meeting objectives?
New Technologies We May See Soon

According to Matt Harvey, Vice President of Internet Services at PSAV “We see from the report that venue Wi-Fi networks are a source of concern for event planners and that poor Wi-Fi experiences are holding back the greater adoption of other event technologies like live streaming and mobile apps. Looking to the future the dependence of event technology on the venue network will only increase and venues will need to be mindful to provide not only good quality Wi-Fi for the purposes of internet access but also a robust infrastructure that is capable of supporting the next generation of network enabled event technology equipment and solutions.”

Mike van der Vijver, Meeting Designer with MindMeeting says: “One of the difficulties with VR or AR in meetings is that the technology as such adds very little. It only does if it is embedded as a meaningful element of the program and of the delegate experience. In other words: if there is a connection with the content. There is still a large gap between the technology and such meaningful applications.”

In 2016, the survey initially asked meeting planners which is more important in their opinion, natural daylight or a clearer view of the screen. In 2017, 54% of meeting planners chose natural daylight – a 17% increase from 2016. Yet the tide seems to have turned in 2019 towards the need for a clearer view of the screen even if that comes at the expense of access to natural daylight. The two may not be mutually exclusive however and good design, especially with direct-view flat-panel displays instead of projection technology, can help meet both goals.

Importance of Natural Daylight in Rooms Versus Clearer View of Screen

“Plenty of natural daylight is important and so is being able to see monitors and screens clearly. If a space is designed correctly then there isn’t a conflict; attendees shouldn’t have to choose between the two.” says Frank Rosello, Head of Design at etc.venues.
Culinary Contributions to Experience Creation

Results from this year’s survey continue to show that meeting planners are increasingly looking to food and beverage to be a part of their overall experience creation strategy. When asked how much they agree or disagree (on a scale of 1=strongly disagree to 10=strongly agree) to a series of statements about food and beverage offerings, meeting planners provided a rating of 8.7 for the statement “food and beverage is a key part of the meeting design and experience” up from 8.4 in 2017.

However, using food and beverages to enhance the overall experience must be balanced with individual needs. As seen in figure 10, meeting planners most agree with the statement, “In the past two years there has been an increase in the number of requests to accommodate allergies, personal eating plans or preferences”.

It is also becoming more important to planners that food offerings be sourced locally as much as possible and be seasonally appropriate.

Given these demands, it is not surprising that there is some frustration on the part of meeting planners when arranging food and beverage offerings. When asked what frustrates them the most, several key themes emerged including the extensive waste of food, a general lack of creativity and a lack of flexibility. Planners however, also appreciate that delegates can be a bit unrealistic in their demands and don’t always appreciate the differences between dietary restrictions and general dislikes.

While demands are high on the part of meeting planners, 88% generally have confidence that venues will accommodate dietary requirements if communicated in advance.
Food Waste a Concern for Environmental Footprint

Further supporting the idea that planners are more aware and conscious of their social and environmental footprint, when asked, what frustrates them the most in terms of food and beverage offerings, meeting planners indicated that the excessive waste of food was a key concern. According to one respondent, their biggest frustration involved “High food and beverage minimums which translate into wasted food! Work with the groups to have a REALISTIC F&B menu, so no food is wasted, but don’t jack up the rental prices because groups are trying to not be wasteful.”

- Layla Warfield, Director, Mabrouka Events Ltd, United Kingdom
How much do you agree or disagree with the following statements
(1=strongly disagree, 10=strongly agree)?

2019  2017*

In the past two years there has been an increase in the number of requests to accommodate allergies, personal eating plans or preferences.
[8.8]  [9.1]

Food & Beverage is a key part of the meeting design and experience.
[8.7]  [8.4]

There is a link between food types served at different stages of the event day and delegate energy levels.
[8.6]  [8.4]

Food offerings and corresponding presentation should be offered based on the time of the year (seasonality) and the venues geographic location.
[7.9]  [8.5]

There is a benefit in venues offering meeting and conference delegates continuous refreshment break service throughout different parts of the day versus set times for delivery.
[8.4]  [8.3]

Nutritional information should be visible or available.
[8.3]  [8.0]

Health and well-being is a primary initiative of my company.
[7.5]  [7.5]

Local product source information important.
[7.4]

My organization(s) offers evening activities, beyond simply bar service after dinner.
[6.8]  [6.7]

The topic, tone or message influences menu planning. Example: bad news = comfort food.
[5.4]  [5.4]

Food is necessary and considered “fuel” only.
[4.1]  [4.1]

*Not all categories included in 2017 – data shown when possible.
Alan Corlett, Group Commercial Revenue Director of De Vere in the United Kingdom who operate a number of meetings focused hotels and conference venues reports that local provenance, seasonality, allergy and dietary requirements is continuing to take a precedent on the buying decision for his company.

Tracy Stuckrath of Thrive Meetings and co-author of You@Work feels that dietary needs continue to be on the increase, but because venues are becoming better at accommodating these with clear food labelling, planners may be dealing with slightly less special requests from delegates.

Tracy further comments that with a clear link between food offerings and energy levels, it is unfortunate that you do not see more healthy options on many hotel banquet menus.

The increased feeling that nutritional information should be visible or available for diners to access tells an important story Tracy feels. “As more people are reading labels when at home, they want information when they are eating out. With EU requirements on labelling for allergens and US requirement for providing nutrition information on menu items, this is becoming standard information on what they see outside of the meeting. Providing this transparent information for what we are serving at meetings, can only be a good thing”.

Changing Meeting Formats Around Food Delivery

Meeting planners agree that the format of break and meal times should change in the future. When asked how formats should change, one-half of meeting planners felt there needed to be more frequent, shorter breaks which ties into the finding of how younger generations are impacting the meeting format. Generally requiring more stimulation and shorter presentations, more frequent breaks can aid in meeting the needs of up and coming generations.

“- Melanie Elmquist, Executive Coach/ Facilitator Lorensbergs

The food is just beyond expectations. I’m a person with a lot of allergies so when I am facilitating a conference for three days with twelve hours on my feet with just short minutes in-between for breaks, I’m taken care of in the way I need to be taken care of. Everybody is around, they know what I need, they know what I need, they have been prepped so I don’t have to look around for things that I need, it’s all right there. So things happen really quick and smooth.
As an increasing percentage of respondent’s tie food and beverage offerings to the overall experience creation, venues must continue to adapt accordingly whether that means more creative (i.e., locally sourced) offerings, less food waste and flexibility when it comes to dealing with and managing dietary requirements and allergies.
Respondent Perceptions of Venue Food & Beverage Offerings

<table>
<thead>
<tr>
<th>Question</th>
<th>No (%)</th>
<th>Yes (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generally, have confidence that venues will accommodate the dietary requirements you communicate to them in advance of the meeting?</td>
<td>12</td>
<td>88</td>
</tr>
<tr>
<td>Consider the venues credentials when it comes to sourcing sustainable foods?</td>
<td>46</td>
<td>54</td>
</tr>
<tr>
<td>Consider the venues credentials when it comes to food waste management?</td>
<td>38</td>
<td>62</td>
</tr>
<tr>
<td>Charge delegates an additional fee for accommodating dietary requests not linked to health or religious needs?</td>
<td>94</td>
<td>6</td>
</tr>
</tbody>
</table>

Venue Considerations

It is encouraging to see that 88% of respondents have confidence in the venues ability to accommodate their dietary requirements. At the same time, Tracy Stuckrath who provides dietary and allergen management learning to venues and planners, continues to see plenty of substandard information provided and feels there continues to be room for improvement.

With only 46% of meeting planners considering the venue’s credentials linked to sustainable food sourcing, we expect to see this rise as meetings and their impact on the climate grows in importance. A similar prediction is made for seeking information on sound waste management practices.

“Small changes add up to make a big difference. We now have a zero-landfill policy. Even our cooking oil is recycled into bio-diesel which fuels the vans that deliver our supplies. It’s a symbiotic relationship between us and our partners that adds up to less wastage and lower costs – which can be passed on as savings to clients. Everyone benefits.” says Frank Rosello, Head of Design at etc.venues.

The majority of meeting planners are not being faced with venue-imposed charges for accommodating dietary requests. However, in IACC’s 2018 Guide to Managing Dietary and Allergen Requirements, the advice given is to ascertain this in advance of contracting with venues, as some do charge.
Sharing Attendee Dietary Information & GDPR

Stine Gregersen Kold, Director at Rungstedgaard in Denmark highlights a connection between managing dietary needs and sharing attendee data. “Being an EU venue, GDPR has taken, and still does take up a lot of our time, specifically in regard to what information meeting planners are allowed to share with us. This legislation makes communication with our guests more difficult than before GDPR came into effect.”
It is clear from this year’s research that whichever focus a meeting or conference planner has, whether it is budget & ROI, technology rich needs, or by importance to solve challenges, the focus on the experience for attendees is continuing to intensify. This is positive for the long-term health of the industry, after decades where little evolved as the world evolved around the meetings industry. Meetings that are focused on delivering content in an engaging and immersive fashion, with technology elements, and an agenda that is designed with the goals in mind, will continue to elevate meetings as critical element in company culture.

Ellen Sinclair, VP for Benchmark, a Global Hospitality Company and chair of IACC’s Meeting Room of the Future initiative highlights “Planners are less and less tolerant of unreliable technology and venue service because it steals away precious time from their productive time. Every interaction is an event and “surprise and delight” elements in the environment, be it a unique food offering or thought-provoking art, create a more vivid memory of the content for the delegate after returning home.”

The continued move towards creating stronger event experiences means meeting planners of the future will need to become event and motivational ambassadors within their companies. Attendees strive for a different environment to normal everyday work and they want to share their life and experiences. They need memories to share with colleagues, friends and family or a transformative experience that develops them as an individual or a business.

Mike van der Vijver, Meeting Designer with MindMeeting says: “One of the ‘hidden’ needs here, is for meeting planners to bridge the gap between logistics-operations-content-objectives. Planners need to become the accomplices of their company’s executives in achieving the required goals through meetings.”

As corporate events become more creative and experience-driven, meeting themes are now embodied in every aspect of the event, including the design of the reception, breakout sessions, and other event elements such as food, décor, and exhibits.

From live-streaming to audiences in other countries, to Facebook, WhatsApp and Instagram filters for real-time event engagement on social media, technology is now embedded into every conference and event and is impacting on how planners design meetings and evaluate venues for suitability.

In the coming years for virtual reality and augmented reality, there are endless opportunities for positive industry impact, especially at tradeshows. VR headsets will soon be used to demonstrate products in a more realistic and engaging manner while reducing the need to ship physical products to a show. VR also has the potential to redefine virtual meetings by helping the remote attendees feel as though they are present in the meeting room.

Venues are working hard to be more appealing to sustainability-conscious planners and delegates. The Events Industry Council will launch this year two new certifications for venues and event planners. More companies are developing formal sustainability initiatives that include certain ethical and environmentally friendly criteria to meet when choosing venues or other services needed for a meeting.
Whilst General Data Protection Regulation (GDPR) was not addressed specifically in 2019 survey, it is assumed that security of data and cyber security which planners see as a developing area for focus, may well be linked to the responsibilities meeting planners are legally held to account for.

Meeting and conference owners need to give more time, focus and budget to make sure they are engaging geographically, generationally and culturally diverse set of attendees in their meetings and content.

The IACC Vision: IACC is a community of passionate people and companies 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, Singapore, Hong Kong, Mongolia, Malaysia, Denmark, Sweden, Belgium, France, Switzerland, Spain, Italy, England, Scotland, Ukraine, The Netherlands, Germany, Russia, 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 those who have contributed to the funding of the IACC Meeting Room of the Future (TM) initiative.