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MEETING PROFESSIONALS INTERNATIONAL

MEETINGS OUTLOOK



The latest research predicts increasing attention to meeting design, hybrid and virtual meetings, social media, tech innovations and the overall health of the meeting and event industry.

2014 WINTER EDITION



MEETING PROFESSIONALS INTERNATIONAL

MEETINGS OUTLOOK

By Elaine Pofeldt

The tough conditions facing meeting professionals during the recession are slowly fading, particularly in the U.S. and Canada—but that downturn has, nonetheless, left a lasting legacy of challenges.

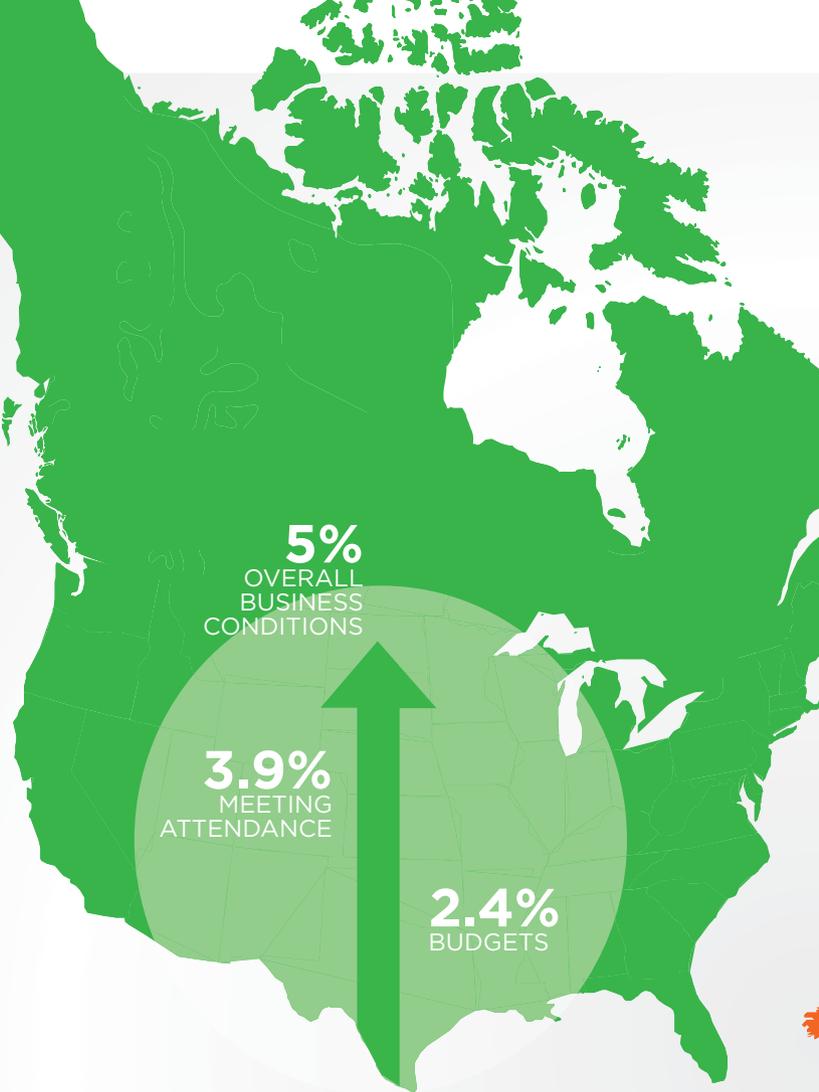
In what appears to be a leading indicator of an economic recovery, U.S. and Canadian meeting professionals forecast a 5 percent improvement in overall business conditions in the coming year, according to the meeting professionals surveyed for this report. European meeting and event professionals expect to see a 4 percent improvement.

Reflecting increased optimism, U.S. meeting professionals expect a 3.9 percent increase in meeting attendance and a 2.4 percent hike in budgets. Meanwhile, in Europe, meeting professionals forecast a 2.4 percent rise in attendance and a 1.6 percent increase in budgets.

The hiring picture is also improving, with overall employment in the meeting and event industry ticking up a bit. In Europe, there appears to be a slight decline in full-time employment, yet part-time employment and contract work ticked up.

Not surprisingly, economic uncertainty is still a worry for many meeting and event professionals, as organizations contend with economic instability, political logjams and government cutbacks that affect their meetings and the speed at which they commit to budgets and contracts.

Most meeting professionals find they have to do more with less in today's environment. Nearly 64 percent of respondents found that while budget controls are getting tighter or staying



the same, the pressure to innovate is rising.

Planners are often pressed into service to arrange meetings on very short notice—46 percent report that lead times are still getting shorter; 25 percent indicate lead times are getting longer.

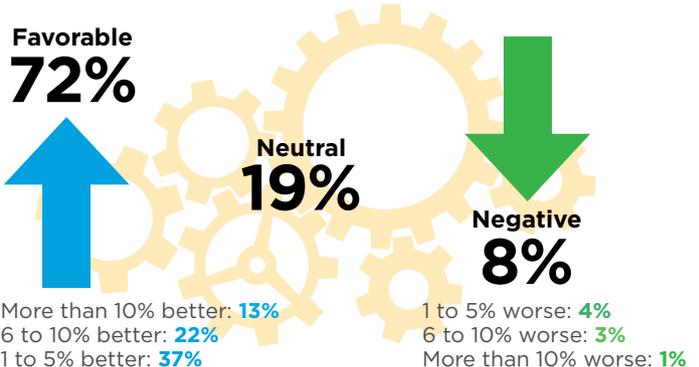
“The new normal persists—it’s all still very last-minute, with budgets released grudgingly,” said one respondent.

Against this backdrop, many meeting pros are turning to technology to lower costs, speed up planning and enhance the value of the programs they plan. They’re using technology to improve logistics, capture data, communicate and do outreach. Some, particularly those in Europe, are taking a more holistic approach to embedding technology throughout meetings, instead of using one technology to address a single challenge, according to the new data.

HOW'S BUSINESS?

Predictions for 2014

Overall business conditions are improving for the meeting and event industry, and the majority of survey respondents are optimistic about 2014. The degree and speed of improvement vary by region and market segment, and professionals must adapt to the changing way people network and learn if success is to continue.



33%

BUDGET CONTROLS

64%

MARKET PRESSURE

4%
 OVERALL BUSINESS CONDITIONS

1.6%
 BUDGETS

2.4%
 MEETING ATTENDANCE

Corporate Meetings Make a Comeback

While corporate meetings haven't returned to pre-recession splendor, they're expected to make a comeback this year—and Dallas already exemplifies this forecast.

"We've seen a strong return of corporate meetings to Dallas, particularly in the last couple of years," says Phillip J. Jones (MPI Dallas/Fort Worth Chapter), president and CEO of the Dallas CVB.

Thanks to the city's reputation as a leading business center, ease of air travel, appealing hotels and sports and arts attractions, he says, "It's just a great community to host meetings and events."

Showcasing corporate meeting growth in the city, Dallas has recently hosted big meetings for companies such as Novo Nordisk, AT&T and Experian. And particularly in the pharmaceutical and technology sectors, groups and attendees are returning more than once, he says.

Jones is optimistic that the resurgence in corporate meetings will continue to help Dallas' economy.

"I do think there are more and more groups and corporations who are loosening the purse strings," he says. "You're seeing more events and offsite activities associated with corporate meetings."

53%

Domestic corporate business has increased compared to previous year.

ON THE RISE AGAIN

Budget Projections in 2014

Budgets have been tight in recent years, and while a slight majority (55%) of respondents say their budgets will remain unchanged or decrease, it is refreshing to see that almost half (45%) expect their budgets to increase in the coming year.

Increased Budgets
45%


No Change in Budget
40%

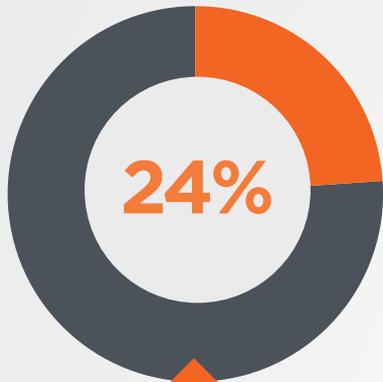
Decreased Budgets
15%


Greater than 10% increase: **3%**
 6 to 10% increase: **12%**
 1 to 5% increase: **30%**

1 to 5% decrease: **8%**
 6 to 10% decrease: **2%**
 Greater than 10% decrease: **4%**

VIRTUAL REALITY

HOW ARE YOU OR YOUR CLIENTS MOST OFTEN USING **VIRTUAL/HYBRID MEETING OPTIONS**?



To **enhance face-to-face** meetings.



To **integrate onsite and remote** meeting elements.

To keep up with the latest tech innovations, 54 percent of those surveyed for this report are relying upon ongoing education to stay current. And respondents are also doing more to hire people with relevant knowledge and skills and looking to suppliers for guidance and leadership—two trends that could place tech-savvy meeting professionals in growing demand.

All technologies are not being embraced equally, however. Industry professionals are evaluating the ROI of new technologies and their budgets for it, while investigating how various innovations affect specific demographic segments. It's clear that meeting professionals are looking to use new technologies to improve the outcomes of meetings and events.

"Every touch on a mobile device is trackable, and this is yielding a wealth of information during events," noted one survey participant.

VIRTUAL AND HYBRID MEETINGS: ANOTHER TOOL IN THE ARSENAL

Meanwhile, virtual and hybrid meeting solutions are continuing to catch on, with 54 percent of meeting professionals reporting usage—both to enhance face-to-face meetings and to integrate onsite and remote meeting elements.

Jeffrey Cesari (MPI Philadelphia Area Chapter), creative director at Shimmer Events, a full-service meeting, conference

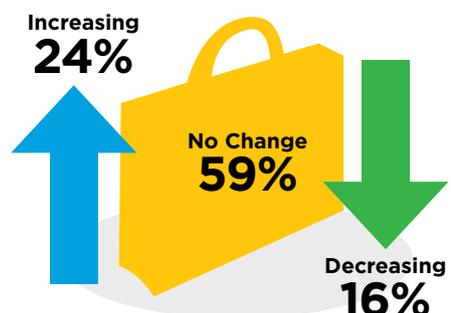


ON THE JOB

Employment Predictions in 2014

Overall employment continues to gradually increase in the meeting and event industry, with slightly greater increases in the U.S. than in Europe. The E.U. might be seeing a slight decline in full-time employment as of the fourth quarter of 2013, as well as a slight increase in part-time and contract employment. The U.S. is reporting slight increases in all areas.

FULL-TIME EMPLOYMENT



Planning for the Future

"We feel we have survived the recession," says Darren Temple (MPI Dallas/Fort Worth Chapter), chief sales officer for the Dallas Convention & Visitors Bureau, pointing to bookings that are up 10 percent year over year, including strength in the corporate sector.

The Dallas CVB has estimated that the Kay Bailey Hutchison Convention Center's economic impact for 2013 will be greater than \$690 million, up from \$570 million in 2012. Last year, the CVB booked 1.5 million room nights and 31 citywide conventions—a record-breaking year.

To spark future meetings growth, the CVB has proposed changes to the city's convention center, one of the 10 largest in the country.

The CVB wants to revamp the layout to make it more conducive to how meetings are being held today, and is considering reconfiguring some of the building's ballroom space to allow for more meeting and multi-use space.

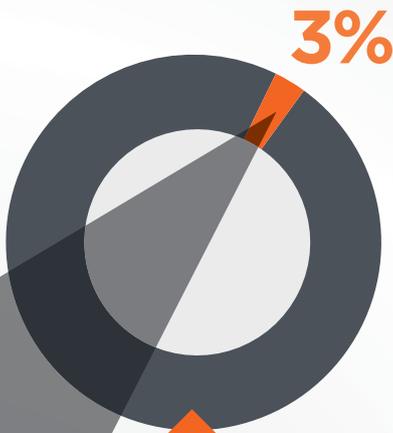
"It's about unique spaces for people to collaborate—and having the best technology available," Temple says.

Currently, about 20 percent of the roughly 1 million square feet of exhibit space in the convention center is available as meeting space. The CVB is looking at increasing that to 40 percent.

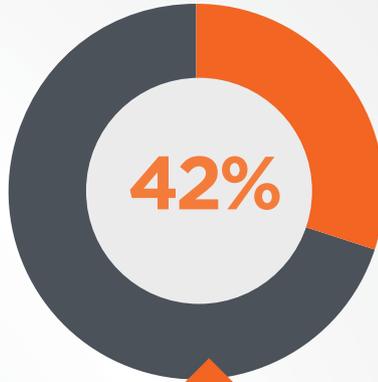
"We think that's what meeting planners are requesting," Temple says. "There's an emphasis on education and ways to collaborate. Sometimes that takes place in very small environments, sometimes in large environments. We need to offer a balanced plan for each."

He anticipates the final plans for the building will cost in excess of \$100 million, but believes there's sufficient demand from big customers to support it.

"We are seeing corporations celebrate success again," Temple says.



To **replace face-to-face** meeting elements.



Virtual/hybrid options are **not in use**.

and event production and management agency in Philadelphia, is among those embracing the trend. Shimmer Events mostly works with pharmaceutical firms. Shorter turnaround times in planning meetings have become common in recent years, he says.

When one pharmaceutical company hired Shimmer Events to plan a meeting for medical professionals and opinion leaders in late December 2013 with less than five business days' lead time, Cesari's firm secured a property at Newark Liberty International Airport in New Jersey, so it was easy for the health care professionals to get in and out. Because of the short lead time, Shimmer Events arranged for a few European-based participants to join using WebEx.

"They were able to have a meeting, and a productive one at that," Cesari says.

However, the hybrid and virtual solutions don't seem to be squeezing out traditional, in-person gatherings. Just 3 percent of respondents are using hybrid and virtual solutions to replace face-to-face meeting elements.

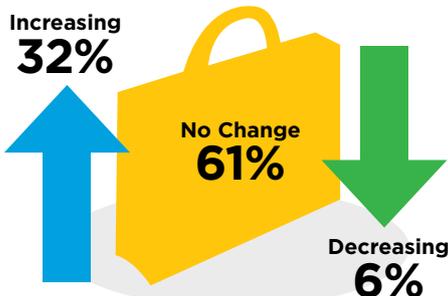
As Cesari put it, "You really do lose the important face-to-face interaction of those impromptu conversations you would have over a coffee break."

"There's an emphasis on education and ways to collaborate. Sometimes that takes place in very small environments, sometimes in large environments. We need to offer a balanced plan for each."

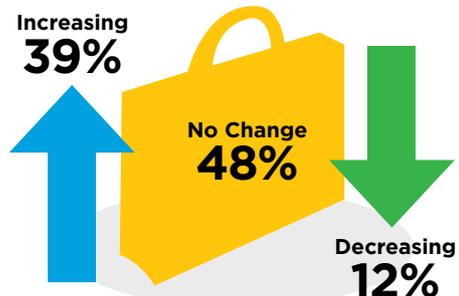
DARREN TEMPLE
MPI Dallas/Fort Worth Chapter
Chief Sales Officer for the
Dallas Convention & Visitors Bureau

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PART-TIME EMPLOYMENT

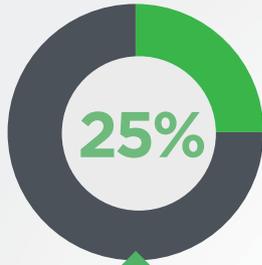


CONTRACT EMPLOYMENT

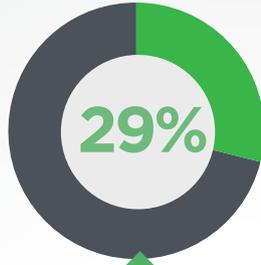


IT'S SO LAST-MINUTE

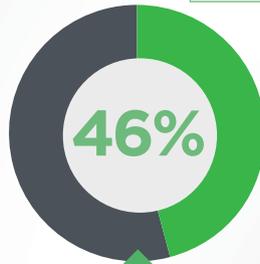
HOW IS YOUR **LEAD TIME** WINDOW CURRENTLY TRENDING?



Longer lead times.



Lead times **not changing**.



Shorter lead times.

Taking Social Media to the Street

If you're looking for inspiration on how to use social media to engage with an audience, experiments by the Dallas CVB may get your creative juices flowing.

As part of the DallasBIG campaign, a large-scale marketing initiative that the CVB launched in early 2013, the organization has stationed about 25 six-foot-tall metal letters B and G around the city, says Noelle LeVeaux, chief marketing officer of the CVB. Passersby pose for pictures between the letters, in the spot that would be occupied by the letter I in the word BIG.

That's significant, because on the letter G, one can see the Twitter hash tag for the campaign (#DallasBIG).

Because many people have taken photos at the displays and shared them on social media or used them elsewhere, the hash tag has, in turn, appeared in many other

"[Our social media campaign] has really engaged the community in the way we were hoping."

NOELLE LEVEAUX
Chief Marketing Officer for the Dallas CVB

places. LeVeaux says the CVB has received wedding invitations and Christmas cards bearing the imagery of visitors posing with the letters.

The campaign has been so popular that it has considerably increased traffic to the CVB's digital properties—its number of Facebook fans has increased 555 percent, Twitter followers have increased 92 percent and unique visitors to **VisitDallas.com** have jumped 62 percent.

"It's really engaged the community in the way we were hoping for," LeVeaux says.

ALL A-TWITTER

WHAT BEST DESCRIBES YOUR **SOCIAL MEDIA** STRATEGY?

We do not have a social media strategy.

16%

We follow a documented social media strategy.

25%

We rely on informal communications and discovery in the marketplace.

11%

We adapt to new options and techniques.

48%

KNOW YOUR AUDIENCE

Attendance Projections in 2014

Most respondents predict an increase in meeting attendance, while some feel attendance will remain flat, if not decrease. Knowing what attendees want and need is the focus of more and more meeting professionals, therefore content and delivery formats will continue to be scrutinized.

6% 1 to 5% decrease: 5%
6 to 10% decrease: 1%
Greater than 10% decrease: 0%

27% Flat (no overall change): 27%

66% Greater than 10% increase: 8%
6 to 10% increase: 14%
1 to 5% increase: 44%



Planning a successful meeting is one **BIG** job. That's why Dallas has a staff designed to help you with every part of the process — finding the best venue, the right transportation or that perfect hotel. And when everything's all said and done, you'll find plenty of ways to have a moment all to yourself.

Make any event easy at [VisitDallas.com/Meetings](https://www.visitdallas.com/meetings).

DALLAS
BIG
THINGS
HAPPEN
HERE

FUTURE PROOF

HOW ARE YOU ADDRESSING RAPID TECH INNOVATION?

28%

We are employing people with relevant knowledge and skills.

25%

We rely on suppliers for guidance and/or leadership.

53%

We keep current and stay educated.

15%

We are evaluating the impact on various demographic segments.

23%

We are evaluating budgets and estimating ROI.

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DELIVERING VALUE IS KEY

Attendee needs are changing, and as a result, the bar has been raised to create events with enriched meeting design and content to provide more value to participants. Many meeting professionals are experimenting with social media platforms and other technologies to do this, and working to make meeting formats and delivery methods more appealing to enhance the long-term ROI for attendees.

Experiments to achieve this goal take many forms. As one respondent put it, "We are seeing more integrative technology, which includes the use of tweets, texts and emails during a presentation and using [other tech] to aid the presenter in moving, gathering and answering questions."

Some meeting professionals are turning to technology to add to the entertainment value of events as well, without much added cost.

David Mitroff, Ph.D., has been using Eversnap, a photo sharing application, to project live streams of photos

of attendees on walls during events. He organizes networking events in the San Francisco Bay area for young, tech-savvy professionals as founder and chief consultant of Piedmont Avenue Consulting Inc. and creator of Walnut Creek Events, which produces and promotes both networking events and social mixers.

Besides adding to the fun for participants, the app allows him to include the logo of an event's sponsor as a watermark, which helps to generate better ROI from the event, especially when photos get shared on social sites. He posts slide shows of event

photos on WalnutCreekEvents.org, which provides an additional touch point with attendees after an event is over.

"It doesn't matter what your messaging is and who your audience is," he says. "It's finding the right tools to engage with those people."

Sometimes, these experiments are done on the fly. Cesari recalls one awards ceremony where a winner could not attend because of a personal emergency. At the client's request, Shimmer Events arranged for the winner to attend via Skype. The production team arranged for him to be visible on a giant screen in the ballroom and to say a few words about receiving the award. ■

"It doesn't matter what your messaging is and who your audience is. It's finding the right tools to engage with those people."

DAVID MITROFF, PH.D.
 Founder and Chief Consultant of
 Piedmont Avenue Consulting Inc.
 Creator of Walnut Creek Events

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