

## **Association Research: October 2008**

### **Trends, challenges, tips and forecasts – Association meeting planners 2009 and beyond**

Association meeting planners on the whole remain confident about the future, whether 'fairly, moderately, reasonably, or very' according to findings in the latest research report from IMEX.

The 5<sup>th</sup> Annual IMEX survey of the association meetings sector (covering 18 countries across Europe and Scandinavia, plus USA and Canada) reflects the opinions of over 150 executives, most in senior positions.\*

Such opinions clearly transcend shorter-term concerns about the economy and travel costs. Those expressing 'positives' about the future commented on 'our expertise and trouble-shooting skills'; 'our negotiating ability'; 'our expanding membership and programmes'; and 'the growing internationalisation of minds'.

Perceived negatives, on the other hand, included 'our increased dependency on retired people'; 'different laws operating in different countries'; 'key employee burnout'; and 'having always to meet higher expectations of standards on shoestring budgets'.

On balance, the survey supports the view that the sector is well placed to enjoy a confident, robust outlook. Key to this are advantages arising from online management (registration, payment, communication), competition among airlines, which is driving down fares, and emerging destinations plus the accelerating momentum towards greener meetings.

#### **Attendance**

The survey results suggest that global economic circumstances are tending to stabilise attendee numbers at association meetings, slowing the growth trend of the last four years. Those noting a 'significant' or 'slight' increase in participation at their meetings has fallen to 59% (from 70% in 2007; 68% in 2006; 64% in 2005; 56% in 2004), but with the percentage noting 'no change' rather higher at 26%. However, only 15% identify a decline in numbers.

Those doing especially well offer explanations such as: 'better speakers and topics'; 'growing membership'; 'enhanced reputation of our programme'; 'better marketing'; 'improved offers to attend'; whilst those noting a downturn mention: 'competitive events'; 'political, economic and environmental threats'; and 'stricter compliance regulation'.

#### **Costs**

Unsurprisingly, the proportion of association planners reporting that the overall costs of staging meetings at their destination have risen is now up, to 66% (58%; 65%; 60% in previous years). Mentioned most often in this context are the prices of venues, though some organisers refer to their 'better budgeting' and 'hotel contracting three years ahead' as reasons for an opposite trend. However, a further benchmark statistic, that of the overall cost of organising the associations' meetings programme is also showing growth, up to 63% (53%; 60% in previous years). Explanations include: 'having to pay speakers more'; 'fuel surcharges'; and 'meetings are becoming more important to us so consequently more staff-time is required'. In contrast are references to 'the greater use of volunteers to

help keep costs down'; and 'our events are increasingly characterised more as working than prestigious events'.

### **Influencing factors**

Association meeting planners were again asked to place in sequence a ranking of 10 factors that influence their work (Table 1).

Table 1:	2008	2007	2006	2005
How to devise conference programmes that appeal to the broadest audiences	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>
How to offer better value for money meetings	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>
How to negotiate with hotels, convention centres and airlines	3 <sup>rd</sup>	3 <sup>rd</sup>	3 <sup>rd</sup>	5 <sup>th</sup>
How to appeal to younger delegates	4 <sup>th</sup>	5 <sup>th</sup>	7 <sup>th</sup>	7 <sup>th</sup>
How to attract higher overseas attendance	5 <sup>th</sup>	5 <sup>th</sup>	8 <sup>th</sup>	3 <sup>rd</sup>
How to respond to the multi-cultural preferences of delegates	6 <sup>th</sup>	4 <sup>th</sup>	5 <sup>th</sup>	-
How to integrate electronic communications into the meeting	7 <sup>th</sup>	7 <sup>th</sup>	4 <sup>th</sup>	6 <sup>th</sup>
How to keep up-to-date with so many changes in the meetings market	8 <sup>th</sup>	8 <sup>th</sup>	10 <sup>th</sup>	8 <sup>th</sup>
How to manage issues of security	9 <sup>th</sup>	10 <sup>th</sup>	9 <sup>th</sup>	9 <sup>th</sup>
How best to work with suppliers in different countries (with different standards)	10 <sup>th</sup>	9 <sup>th</sup>	5 <sup>th</sup>	4 <sup>th</sup>

Whilst the hierarchy of answers remains broadly in tune with previous years, perhaps the most significant trend is that of trying to ensure that events appeal more to younger delegates. Further verbatim suggestions for organisational factors that really matter include 'how to achieve technical excellence'; 'what to offer sponsors and at what price'; 'how to plan for kids to ensure a family-oriented atmosphere'; and 'how to maximise networking opportunities'.

**A dimension to each survey is the opportunity that IMEX presents for planners to express their concerns about the future and to list challenges and key issues.**

Currently these include (verbatim comments):

'how to be more innovative to revive member enthusiasm and motivation'  
'stronger competitiveness ~ more rival meetings, less sponsorship'  
'increasing travel times and costs for delegates'  
'getting feedback before and after the meeting'  
'competition from online education'  
'how to achieve more value with less money'  
'conference fatigue'  
'fragmentation of association markets'  
'getting the right conference theme(s) for the right moment'  
'the unstable airline industry'  
'how to provide for workable in-depth philosophical discussions when our overall conference size keeps increasing'  
'persuading younger delegates to work voluntarily'  
'people less willing to fly because of the carbon footprint'  
'how to ensure reciprocal comprehension of the different languages used in speeches.'

**A further option for respondents is to list examples of what most irritates them in the context of business tourism. Currently these include (verbatim comments):**

'the barrage of mail from convention centres'  
'badly planned convention centres built largely to please political egos'  
'receiving foreign payments without credit cards'  
'the condescending attitudes of 25-year-old hotel sales managers teaching me how to negotiate'  
'overbooking hotels ... hotel prices ... over-long requirement for reservation guarantees from hotels ... hotels that force you to use their selected suppliers ... over-strict guarantees and payment conditions ... varying contract conditions'  
'poor communication ... broken promises'  
'over-zealous venue marketing staff'  
'many venues think and act as if they have a captive market'  
'variations in standards between tourism offices'  
'lack of electronic communications in the conference auditorium'  
'the cost of internet connections in many venues and their monopoly approach to services such as catering, transport'

### **Macro-trends**

**Association meetings planners were asked next for their reaction to MICE sector macro-trends, as follows (verbatim comments):**

#### **Responding to Multi-Culturalism**

'only in the sense that specifically we avoid Ramadan and the Chinese New Year'

'it introduces a language barrier and the resulting high cost of translation'  
'our sponsors help fund increasing numbers of delegates from these countries'  
'the issue affects our choice of meals and the timings and flow of events, but not the destination or venues that we use'  
'we have to avoid Europe/US most of the time because of anticipated visa problems'  
'one dilemma raises another ... in respecting one culture do we disrespect others?'  
'visa requirements are such an issue ... even if they can get them they may still be refused entry'

### **Reacting to Climate Change**

'more careful selection of destination criteria'  
'we are considering staging our main meeting every two years instead of annually'  
'unpredictable weather is afflicting us'  
'we take our smaller meetings to where the delegates live, and not make them travel'  
'we offer Skype and web links to those not wanting to travel'  
'now we use trains where travel is under 500km'  
'we offset where we can and source locally wherever possible'  
'some people now refuse to fly to a meeting and are asking questions about water usage and how to avoid using paper and plastic'

### **Engaging with delegates from emerging countries**

'some success, but the quality of delegates has to be assessed carefully'  
'some of our 'old-school' members don't like the dilution and distraction that they represent'  
'we offer bursaries and reduced registration fees for these attendees'  
'they invariably are deterred by the high costs of meetings within Europe'  
'we respond deliberately by organising prestigious events in emerging countries'  
'the key is to stage a friendly and welcoming conference that keeps them coming back'

### **Demonstrating Social Responsibility**

'we co-operate with local community associations - for example, by painting a school'  
'we operate a sustainable development charter in host countries'  
'we always leave a 'legacy' gift at the destination'  
'we nominate a charity and collect donations from delegates'  
'we buy from companies which employ disabled people'  
'we set out to erase our carbon footprint by contributing to useful local projects and suppliers'  
'we source our conference bags locally'

### **Achieving electronic integration**

'we offer multi-blog coverage in real time'  
'currently we are looking both at electronic voting and how to achieve immediate reactions from a speaker'  
'electronics do not make for friendship'  
'a snag is that the internet is not always reliable in every country'  
'our membership typically is older and not too bothered by this approach'  
'we are using conference calls to replace smaller meetings of up to six delegates'  
'it is good for planning networking/matchmaking appointments in advance for attendees'

'increasingly we are using webcasting for our conference sessions'  
'we don't yet understand the technology enough, nor have a good enough understanding of the participants' access to it at their end'  
'electronic participation is a good extension to our work - but mainly in between our events because it works against increasing our income from staging meetings'

### **Tips**

Among 'secrets' or tips that association meetings organisers are happy to pass on to their colleagues are the following (verbatim) examples:

'smile.. geniality with all ... whatever their colour, religion, culture'  
'avoid cowboy offset companies and do your own carbon-neutralising thing'  
'selecting the keynote speaker is essential'  
'put yourself in delegates' shoes ... imagine the perfect meeting and try to organise it ... make each event unforgettable ... and combine the working and holiday spirit to get the best out of a destination'  
'get the food right - it is always remembered'  
'let the meeting support the overall goal of the organisation, and not the other way round'  
'employ a multi-cultural staff'  
'remain cool, flexible, and have a back-up plan'  
'use evaluation techniques ... and always supply a manual of procedures handed down from one organiser to the next'  
'act personal with the delegates ... remembering each is unique. Forget bulk mail  
'.. insert one personal sentence in each invitation letter ... and refer to their works'  
'get your finances right'  
'make a really good call for papers in order to attract fresh interest'  
'train your presenters to communicate and not rely on Power Points'  
'wine with everything'  
'never assume anything ... always check, and check again'  
'a good social event early on sets the tone and breaks the ice'

### **Common mistakes**

Conversely, research respondents are prepared to offer their examples of common mistakes that they have made/feel can easily be made. Verbatim examples follow:

'choosing a venue that is too large. It's better to squeeze delegates into a smaller room'  
'don't set your breakeven too low and be seen to make too high a profit'  
'forgetting to add value for delegates'  
'don't assume people will pay a little more for luxury ,  
'being over-confident ... organising too late ... negligence over cost- control .. and thinking you know it all'  
'assuming delegates read emails '  
'never take a committee for granted - take ALL views into account'  
'confirming final numbers with the venue too soon ... they accept late extras, but are inflexible over minor reductions'  
'don't commit to a destination until you have signed a deal with local hotels'  
'don't sign any contract until you have talked to your PCO''  
'forgetting to check whether other major events are on at the same time'  
'packing the conference schedule too full ... start with the planning of free networking time. Fewer, but longer sessions'  
'too often the emphasis is on important people rather than important goals/subjects/ideas'

'believing suppliers will deliver on time'  
'neglecting the cultural/tourism aspect of the chosen venue'  
'avoid building the programme you want rather than the one the attendees want'  
'not enough assistance to participants making their own travel/ accommodation arrangements'  
'underestimating the time people need to move around and settle between seminars'

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\*Typical job titles, for example, include: executive secretary, ceo; joint managing director; director general; administrator; president; professor; general manager; international director of meetings; executive director; consultant; secretary; pr manager; and pco.

Represented areas of membership include: accountancy; advertising; banking; broadcasting; cleaning industry; criminology; dentistry; entrepreneurship; exhibitions; financial services; fisheries; green energy; heritage; hospitals; journalism; languages; leisure; music; petroleum; politics; poultry; psychology; public transport, sports; surveying; and travel agencies.

More details and comparative reports - <http://www.imex-frankfurt.com/dataexchange.html>

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IMEX 2009 will take place on 26th – 28th May. For further information see [www.imex-frankfurt.com](http://www.imex-frankfurt.com)

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Editors Notes:

- + IMEX 2009 will take place from 26 – 28 May in Hall 8, Messe Frankfurt.
- + Over 3,600 hosted buyers from almost 60 world markets attended IMEX 2008, amongst an overall trade visitor total of 8,751. Further statistics are available on the IMEX website.
- + 3,500 companies representing 150 countries exhibited at IMEX 2008
- + A virtual exhibition continues online throughout the year at [www.imex-frankfurt.com](http://www.imex-frankfurt.com)
- + An extensive library of IMEX research and industry research can be downloaded from <http://www.imex-frankfurt.com/dataexchange.html>
- + Awards IMEX has won:
  - 2006 AEO (Association of Exhibition Organisers) award for 'Best Trade Show'
  - 2005 AEO (Association of Exhibition Organisers) award for 'Best Visitor Experience at a Trade Show'

Media Contacts:

- Kit Watts, +44 1273 773002 [kit@imex-frankfurt.com](mailto:kit@imex-frankfurt.com)
- Carina Bauer, +44 1273 224956 [carina@imex-frankfurt.com](mailto:carina@imex-frankfurt.com)