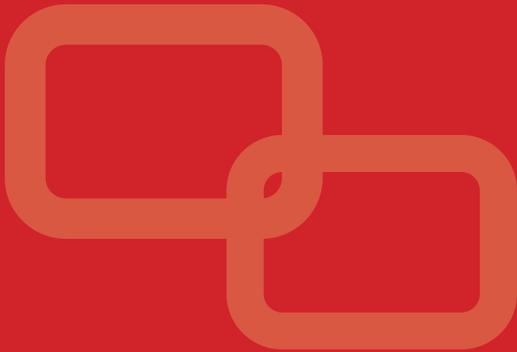




MANAGEMENT SUMMARY

# **Meetings and Conventions 2030: A study of megatrends shaping our industry**



**“Is not our task to predict the future but to be well-prepared for it.”**

PERICLES (5TH CENTURY B.C.)



**Matthias Schultze,**  
**Managing Director,**  
**German Convention Bureau**

For almost a decade Germany has occupied first place in Europe and second place worldwide as a meetings and conventions location. This position needs to be strengthened and expanded.

Over the medium- and long-term, only those destinations will thrive that adapt well to the present and future trends in the hotly contested meeting and convention market.

We hope that our study “Meetings and Conventions 2030,” which you’ve received as a summary, will contribute to identifying future trends, tendencies and challenges affecting our industry and will help find the right measures to respond to them. It can serve as the basis for lively dialogue between

industry actors and representatives from science and politics.

Top experts from politics, business and science as well as study partners, supporters and members of the German Convention Bureau contributed their know-how and helped compile the results in a document of almost 100 pages. Eight universally valid megatrends and the resulting areas of action were identified and then examined in detail: globalization, shortage of resources, urbanization, demographic change, feminization and diversity, technology in work and life, sustainable development, mobility of the future, and security and safety. Concrete future scenarios that show how meetings and conventions could look in 2030 were designed with a focus on

architecture, knowledge transfer and technology.

Yours truly,  
 Matthias Schultze

A handwritten signature in blue ink that reads "Matthias Schultze".

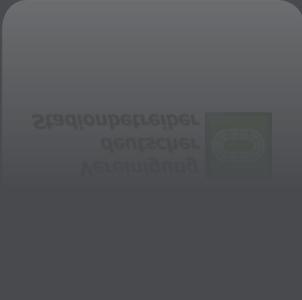
PUBLISHER OF THE STUDY



PARTNERS OF THE STUDY



SUPPORTERS OF THE STUDY



# Situation and Challenges

In coping with the great challenges of globalisation as well as rapid social, technological and scientific change, there is a growing need for reliable knowledge on the future and the identification of options that can be utilised to shape the future.



**In the last decades, meetings and conventions have become an important economic factor with good future prospects. 2.97 million events with 362 million participants took place in Germany in 2012. Germany is now in first place in Europe and worldwide second place after the USA as a destination for all meetings and conventions.**

An important factor for the unchallenged position as European market leader is Germany's outstanding infrastructure. An extensive network of providers in various branches guarantees the ideal conditions for successful meetings and conventions. The large number of conference hotels, convention centres and event locations is a main factor as is excellent value for money. The transportation links to more than 40 airports, the extensive rail network and well-developed highway system are unique. Moreover, German providers are at the forefront when it comes to green meetings and sustainability due to their high level of innovation.

Through „Meetings and conventions 2030: A Study of Megatrends Shaping Our Industry,“ we hope to contribute to this innovation. We will identify, analyse and evaluate trends and tendencies in their probable development and meaning for the meetings industry up until 2030. In this way attention can be focussed early enough on trends relevant to the industry and adjusted accordingly in order to secure and expand Germany's position as a meetings location. Today's providers and conference planners will receive a tool to use for the meetings industry of tomorrow so that they can deal more effectively with, or even influence and steer developments.

### **Events Encourage Innovation**

The increasing complexity and lack of transparency of the world today especially affects the meetings industry in all its variety. Meetings, conventions and events serve as platforms for the exchange of ex-

periences and ideas. As a result, successful organisation is also dependant on numerous terms and conditions of context - and this won't change in the next decades. Events that enable exchanges of experience and knowledge can help promote innovation. They can provide impetus for political, scientific and social processes and encourage international understanding. That's why it's necessary for key actors to recognise future issues early enough, communicate them and come up with plans of action. Modern future research can make a significant contribution by offering support and suggestions.

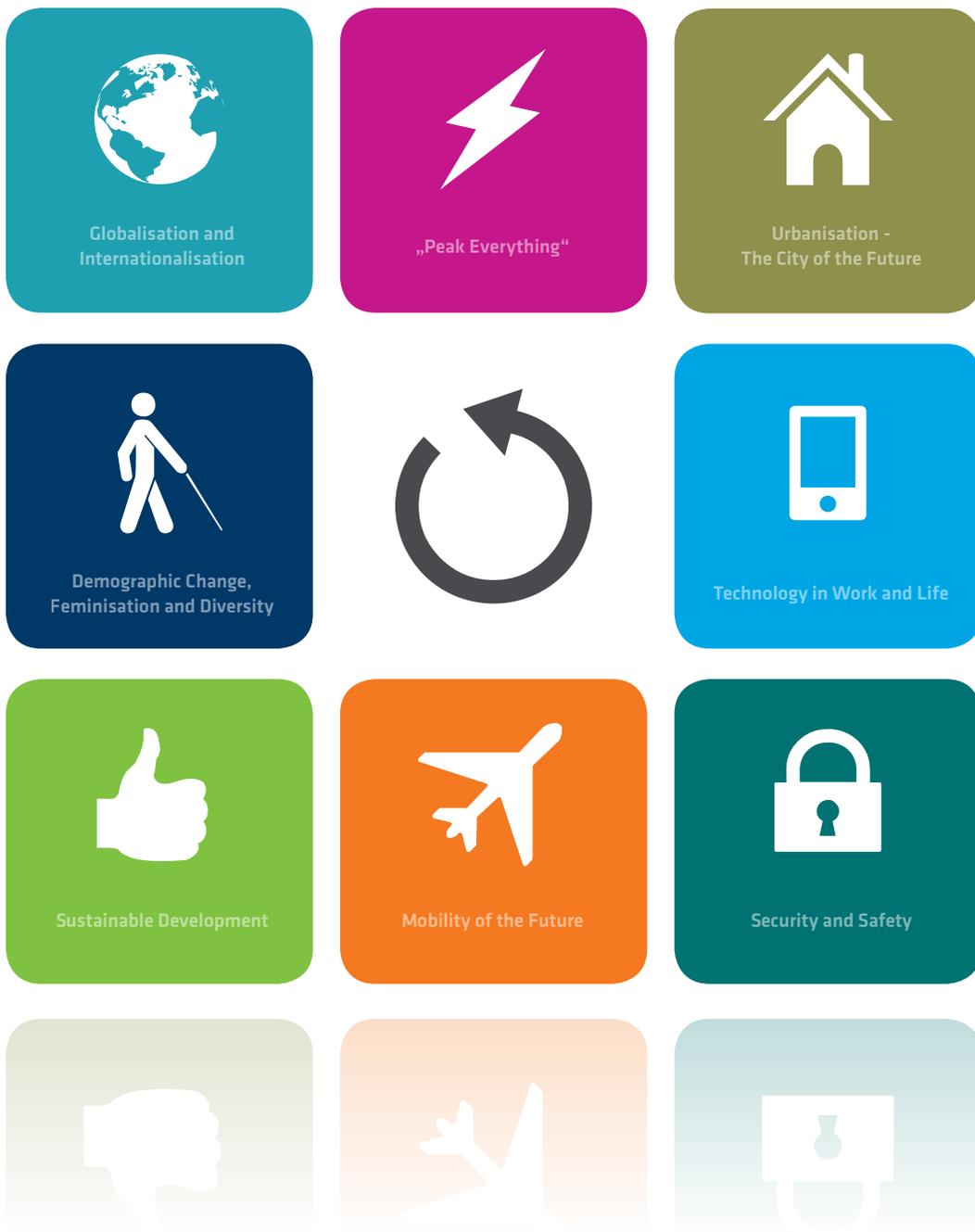
### **Tools of the Meetings Industry of Tomorrow**

Experts from the relevant scientific disciplines, partners and members of the German Convention Bureau were involved in the study.

The multidimensional research project leveraged the various methods from the behavioural sciences, and consisted of desktop research, online surveys, in-person interviews with national and international experts, scenario workshops and more. First, the meetings industry's present situation was outlined. Then, social megatrends important to the industry were selected and described: globalisation, resource shortages, urbanisation, demographic change, feminization and diversity, technology and digitalization, sustainable development, mobility and security.

These developments are very plausible and probable; due to the complexity and lack of clarity of each one, they can't be considered projections. They are simply a way of understanding multi-faceted developments that interact with each other. ■

**DUE TO THE COMPLEXITY AND LACK OF CLARITY OF THE INDIVIDUAL DEVELOPMENTS, THEY CAN'T BE CONSIDERED PROJECTIONS. THEY ARE SIMPLY A WAY OF UNDERSTANDING MULTI-FACETED DEVELOPMENTS.**



# Megatrends and Their Relevance for the Industry

In this comprehensive study, we outlined developments, selected megatrends and their impacts on meetings and conventions by the year 2030:

- » Globalisation and Internationalisation
- » “Peak Everything” – Shortage of Resources
- » Urbanisation - City of the Future
- » Demographic Change, Feminisation and Diversity
- » Technology in Work and Life
- » Sustainable Development
- » Mobility of the Future
- » Security and Safety

The essential challenges to each megatrend will be described and concrete measures recommended in order to adequately meet future needs.

**Environmental Standards**  
**New Social Standards**  
**Transparency through the Internet**  
**Modernisation Needs**

**Depletion of  
Natural Resources**

**Peak Everything**

**Demographic  
Change**

**Sustainability**

**Urbanisation**

**Feminisation**  
**Individualisation**  
**Respect and Tolerance**  
**Aging Society**  
**Change in Values**

**More Competitiveness**  
**New Life and Work  
Forms**

**Mobility**

**Need for Flexibility**  
**Rising Energy Needs**  
**Rising Costs**  
**Aging Society**

**Globalisation**

**Intercultural Skills**

**Technology**

**Security**

**Data security**

**New Educational Requirements**  
**New Competence Requirements**  
**A Question of Ethics**  
**Virtualisation**  
**Data Protection**



# Scenarios

Scenarios were developed in three major areas of the meetings industry:

- » Architecture
- » Knowledge Transfer
- » Technology

This involved the presentation of a possible future scenario with a detailed and comprehensive picture of the future. Scenarios are hypothetical sequences of events with the goal of drawing attention to specific connections and decision points.

## Architecture

Even though the Internet has made communication and access to know-how independent of location, conventions and meetings in the future will continue to be dependant on central, conveniently situated places or buildings with special features.

### The future of architecture for meetings and conventions has several important aspects:

- » Certification systems like the one from the German Sustainable Building Council (DGNB) will become more important – in fact, they'll be essential.
- » In dealing with aging societies, event centres can stay competitive if they provide barrier-free access.
- » Temporary use of buildings that can be easily dismantled is part of the sustainability trend.
- » Participants' wish for a „healthy“ feel-good atmosphere requires for daylight and natural ventilation.

## Knowledge Transfer

The demand for suitable learning spaces is growing worldwide due to the increasing complexity of our public and private lives and social relations, the speeding up of numerous development processes and growth of knowledge.

### Essential Aspects of Knowledge Transfer

- » Lifelong Learning, the acquisition of intercultural knowledge, and constant accessibility will continue to increase more than we can now imagine.
- » New formats will supplement traditional forms of knowledge acquisition: various technologies and tools, especially in virtual conferences, and individual forms of knowledge acquisition such as „massive open online courses“ from universities.

- » Hybrid Events: Depending on the format, function and group of participants, increasingly convergent segments of stage technology, lighting, acoustics, presentation and translation technology as well as interactive and feedback options (voting, gaming) will be used. Mobile applications will be more strongly integrated into the lives of older people than they are now.
- » Face-to-Face...Flexible and Up-to-Date: Unlike today's conferences, situation- and participant-specific formats will be used consistently - with examples such as open space conferences and BarCamps. These will rely on flexible space and technical infrastructures.

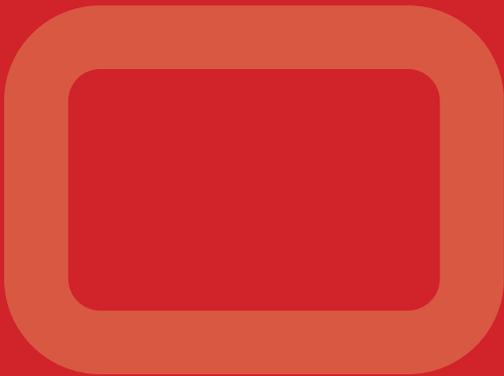
## Technology

Technology is the third scenario: The increasing prevalence of technology in meetings and conventions as well as the changing need of their visitors will result in new event concepts by 2030. Rigid rules and fixed locations will give way to flexibility.

### Essential Aspects of this Trend

- » In 2030, decentralised concepts utilising different technologies will be used primarily for meetings and conferences that include exhibitions. Different locations and virtual spaces will be linked with each other under one central concept.
- » Up-to-Date: New technologies will be used for preparing, conducting and following up events.
- » Virtual and Physical: Face-to-face events will be enhanced by virtual elements and a mixture of „hybrid events“ will become prevalent. Physical and virtual units will require integrated planning from the beginning.
- » New Service Sectors: Due to higher demands on the technical expertise of organisers, a special service sector will develop for the use of convergent

technologies at meetings and conferences. ■





## Summary of Study Results

This study has a broad sociological and multidisciplinary foundation that includes a wide range of experiences and perspectives in and outside of the industry. The intent was to avoid overrating individual popular trends and losing sight of the whole picture, the realities and probabilities. To make realistic assessments, it is necessary to look at the many factors and phenomena as well as their interactions and dynamics.



➔ **The Most Important Results: In the next two decades the „human measure“ (Albert Schweitzer) will still be an important guideline for processes of change.**

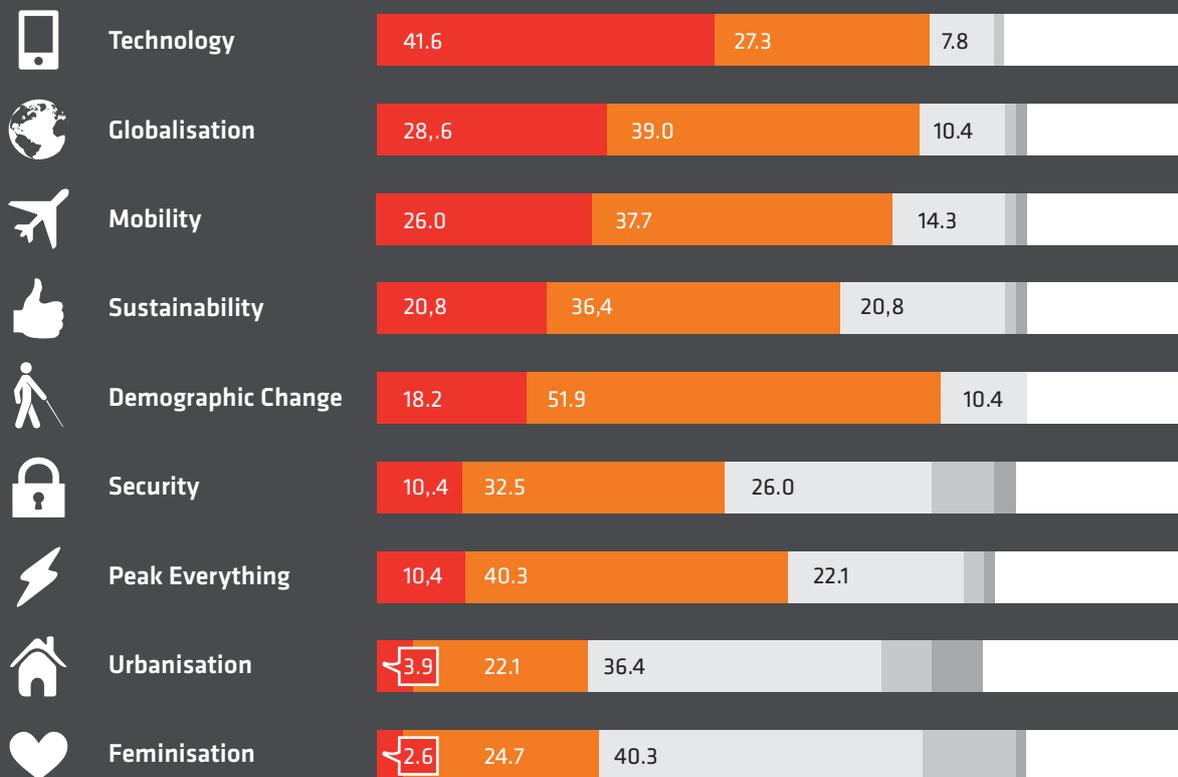
In his book "Megatrends", John Naisbitt refers to continuous tension between various forces and trends. Concerning the use of new technologies, he points out that, even with all the new technological options and applications, human beings have to be considered - with all their desires and abilities, fears and preferences. This is why he speaks of rebalancing the relationship between „high tech“ and „high touch,“ the concrete use of new technology and, at the same time, the need for human and social contact and awareness of human needs.

➔ **The study shows that options such as knowledge transfer, technology and architecture will increase in use in the meetings industry and will supplement previous formats and concepts.**

This will mean combining communication technologies such as „cloud computing“ with building technology and the „Internet of things and services,“ holography for the visualisation of presentations (in integrated wellness sequences), meeting preparation and follow-up or opinion polls using innovative visualisation techniques. Select megatrends were defined to illustrate these developments. In the online survey, industry experts rated the following megatrends as especially relevant:

**What social megatrends do you think will medium-term seriously influence and challenge the meetings industry in the medium term?**

(Online survey question)



Figures in % n=77    ■ very strongly   ■ strongly   ■ less strongly   ■ not at all   ■ don't know   ■ not specified

- » Technology in Work and Life
- » Globalisation and Internationalisation
- » Demographic Change, Feminisation and Diversity
- » Mobility of the Future
- » Sustainable Development

Technology will specifically shape and challenge the meetings industry by 2030. The Internet, social media and mobile devices are the sources of this transformation.

➔ **A majority of people in the industrial countries will potentially have access to almost all information almost always.**

In the „Internet of things,“ it will be possible to identify, localise and steer not only data, but also many devices and everyday objects directly through the Internet. This will have a significant effect on the organisation of meetings and conventions. It will open up the way for completely new models of organisation and division of labour.

➔ **Virtual meetings - spread around the whole world - will theoretically be possible.**

„Rooms will have to be arranged for accommodating ‚virtual‘ speakers who don't want to travel long distances.“ (Stefan Rief, Fraunhofer IAO) But virtualisation also opens up new questions: How much presence and how many integration and communication services are necessary to achieve successful meetings and conventions?

➔ **In sum, the use of various technologies will lead to event formats lasting longer.**

Ideally, meetings and conventions will be preceded by an intensive customer-oriented introductory phase and concluded with a professional follow-up which includes all participants who were actively involved. The internationalisation of science and economics will lead to increased networking needs and expenses for all organizations involved.

This also accelerates the technisation of the meetings. There will be an increasing demand for collaboration technologies

such as audio- and video conferences, digital whiteboards, visualisers, shared views, shared applications or holodecks.

➔ **Need-based systems that contribute to communication and collaboration in groups separated by time and/or distance will become more important for future meetings and conferences.**

Various locations around the world and virtual rooms will be linked with each other during decentralised events. The success of these concepts depends on a central concept that coordinates the event elements in different locations and virtual spaces, adjusts them to the meeting goals and communicates with everyone involved. Organisers of meetings and conventions already use a variety of technologies to collect feedback.

➔ **It is very likely that interactive events will become more important or even one of the central success factors in the future.**

The integration and involvement of participants - that is, the integration of knowledge, participant experience and expectations of the meeting or convention can be improved during events. Future event formats will be required to take the place of today's normal lecture style or supplement it with active participation. People at meetings and conventions will probably use their own mobile devices to contribute to the interaction, running and management of events.

➔ **With increasing use of technology, an essential condition for successful future meetings and conventions will be the provision of „anthropomorphic“ human-machine interfaces for technical systems that can obtain usable information from users' contextual and often vague input.**

Graphic design of technical features such as screens or displays, entry type and process logic will have to be compatible to allow comfortable, intuitive use. Poor ergonomic design could complicate or even prevent interaction between people and machines. Text-based interfaces used to

**SUMMARY**  
**THE INCREASING PRE-VALENCE OF TECHNOLOGY WILL GREATLY AFFECT AND CHALLENGE THE MEETINGS INDUSTRY.**



**IN THE FUTURE  
NATURAL INTERFACES  
SUCH AS SPEECH AND  
GESTURE RECOGNITION  
WILL GAIN IN  
IMPORTANCE.**

→ be the norm; now graphic user interfaces and touchscreens have taken their place. In the future, more natural interfaces such as speech and gesture recognition will become important in transfer of knowledge. With increasing data traffic in the Internet and the growing importance of cloud computing, the “Internet of Things and Services”, social networks and mobile devices, business activities in the meetings industry will shift to a virtual level. This study indicates that security and data protection will be seriously affected, and this will influence usability and people’s reactions to it.

**→ Information security, data protection and the private sphere will represent some of the most important and complicated challenges for the industry, particularly for event organisers.**

Technological developments will also affect mobility - arrival to and departure from meeting and convention event locations plus moving about while there. Technical and organisational security measures have to be developed and used to guarantee information security as far as possible.

**→ In the future people will be able to reach every place on earth more quickly, safely and ecologically responsibly through the use of multimodal transportation systems.**

Ideally, the “Internet of Things” will bring about a new relationship between private and public transportation systems with an almost complete information exchange between different transport carriers/systems and the surrounding area. It will be important to have multimodal concepts where all available offers mesh with each other.

**→ Lifelong learning will play a major role in the meetings industry; education will be future-oriented.**

Megatrends don’t have to do with definable processes of change, but with processes in societies that interact with each other. Due to the acceleration of change, the fast pace of life and sociological dynamics, there are more and more challenges for people and also for the meetings industry. As a result, lifelong learning is particularly relevant for this industry: Long-term, holistic thinking

has to be the imperative. The right decisions and actions are becoming an absolute condition. In this context, the goal of education and qualification must be to promote a „future-oriented, self-reflecting approach“ (habitus).

**→ The central task for all relevant actors in the meetings industry will be to inspire efforts for the intelligent and target group/customer design of events using new technologies and innovative formats the right way.**

Knowledge of technological possibilities and their correct use will be essential in the future. Even with all the necessary specialisation, people will need to acquire basic skills and understand the interaction, the possibilities and limits as well as risks in using technical devices, modules and programs.

**→ Due to ongoing globalisation, mastery of other languages – with the support of technical devices and applications – will become the standard, along with the acquisition of intercultural knowledge and competence.**

This requires sensitivity, the ability to reflect and a level of emotional intelligence. For the most part, competency and skills can be developed in the usual learning contexts or online. Direct acquisition and qualification can best be achieved through travel or living abroad.

**→ The variety of technical options on one hand and diversification of participants on the other will lead to special challenges.**

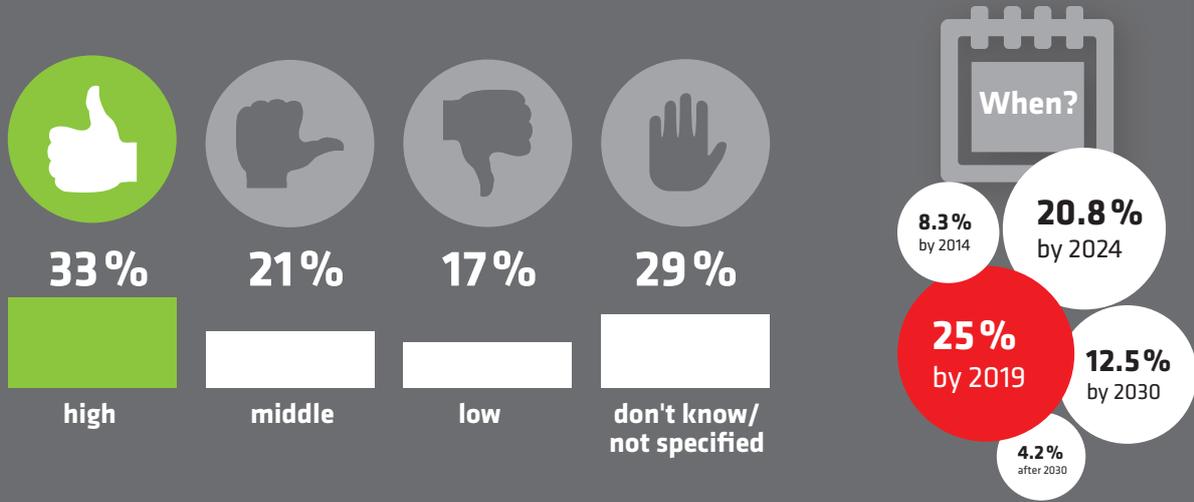
An extreme example is the use of service robots in event buildings, i.e., for cleaning, security or other routine work. Robots could be used for assisting disabled participants, including older people or guests with limited mobility, who could then move more easily in and around convention buildings with the help of specially modified robots.

**→ Event complexes and facilities will be subject to increasing quality demands.**

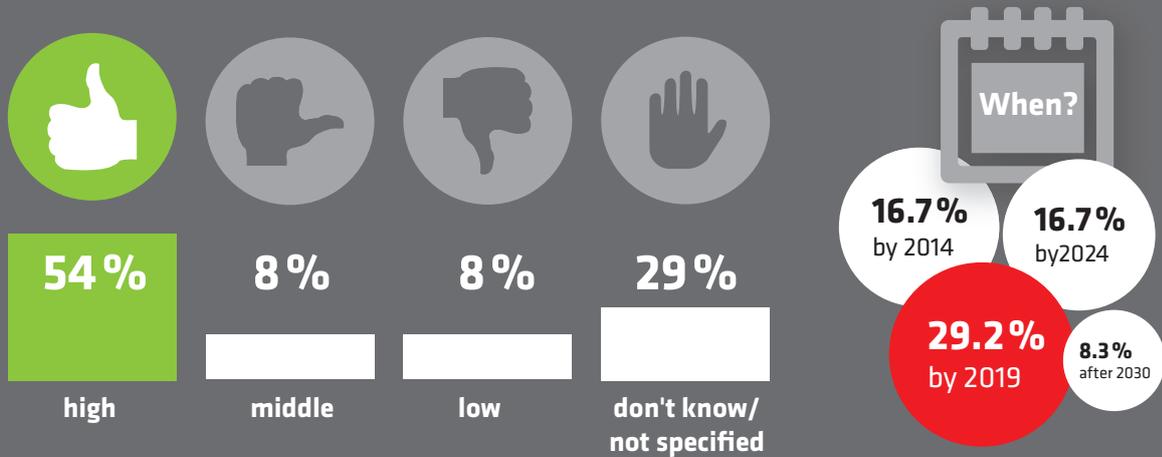
→

In this study, industry experts were asked how probable they considered the following thesis:

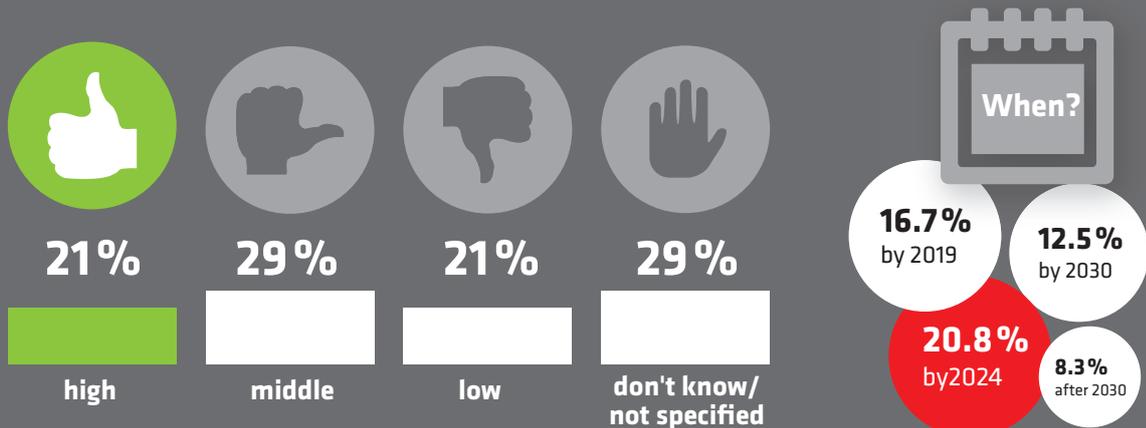
"The semantic web is accepted as an extension of the World Wide Web. Pure data is now information with important content. Users receive useful, credible answers without having to evaluate search engine results in advance."



"Cloud computing has taken over everywhere as a flexible use of IT services. Most private and business data can be found in the Internet data cloud. PCs no longer have physical hard drives. Laptops, smartphones and tablets are the primary computer systems."



"The Internet of things has taken over. Event locations are full of intelligent devices that communicate and are linked with each other. They know what visitors want and where they should go next, offering the information people need about their immediate surroundings."



## Best Practice: LINC

The future of conventions is already visible in the Leipzig Interventional Course at the CCL Congress Center Leipzig.

The CCL recently hosted the Leipzig Interventional Course (LINC) for the fifth time. The LINC, one of the most important conventions in the field of minimally invasive vascular medicine, is directed toward doctors with various specialties from around the world. Predictions that industry experts have made about conventions of the future have already become reality at the LINC convention.

*Rigid space and time limits between various parts of a convention will increasingly dissolve.*

Conventions are getting more integrative and communicative. The participants design their own „pick-and-mix“ package from parts of the programme that are most interesting and impor-

tant to them, move around between sessions, posters and exhibitions, and use every opportunity to network informally.

*The layout of conventions will change in order to optimally meet the need for more flexibility and integration.*

At LINC the structural boundaries blur between lecture halls, exhibitions, poster areas, foyers and catering zones. All event zones are within sight and sound and create a complete unit. As modern as this layout is, it does take on one archaic (cultural) concept: the idea of the marketplace.

*Sensory experiences will play a greater role in future convention design.*

Colour, form, lighting - LINC's well-

thought-out design and lighting concept goes far beyond mere decoration and has obviously been influenced by the wellness idea.

*Technical requirements at conventions will get more ambitious and complex.*

The LINC places the highest demands on network- and presentation technology. Live worldwide coverage, X-ray livestreams and explanatory charts can all be projected on screens at the same time. In addition, participants can test CCL's technical capacity and WLAN-infrastructure with their mobile terminals.

→ Modernisation will have a special role in this area with new and higher standards, monitoring, public ranking and government, association and customer ratings. Competition will increase and some market sectors will further globalise. Energy consumption, one of the great cost factors, will have a decisive role as prices continue to rise.

➔ **There will be important consequences for the meetings industry due to ongoing demographic change.**

These need to be specifically assessed. The increasing number of older people coming to meetings and conventions will be particularly important. Technical and organisational concepts already exist or need to be developed. The industry has to adjust to this change in its own organi-

sations and businesses, with responses such as „age management“ and/or „diversity management.“ Attention must be given to workforce and team composition, personnel support and qualification, and finding work suitable to age, specific cultural skills or other special needs.

➔ **Another finding of the study: The greatest number of respondents assumes that sustainability will remain relevant, even crucial, and that industry actors will have to deal with it more intensively.**

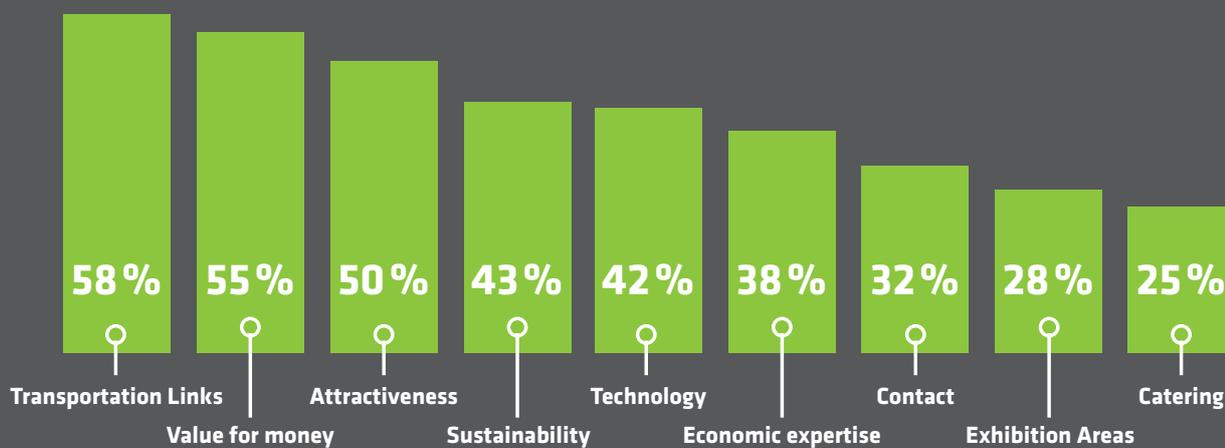
Participants expect that German suppliers will continue to score with their sustainability expertise - especially as the ecological damage and negative impact from Western and global production and way of life become more evident, frequent and violent. Offering of sustainable

solutions and practices can therefore be a genuine advantage that sets suppliers apart from others.

➔ **Sustainable development will become an important quality factor and criterion in choosing convention and meeting locations. It will be a crucial advantage in the competition among event centres and destinations.**

Germany can already boast with this advantage. As the focus on sustainability continues to rise, i.e., due to the effects of climate change, this quality factor will pay off for pioneers like Germany, as a reliable image is something that has to be built and maintained over years. As a result, certifications and rankings will become even more important in influencing the success of destinations. ■

"In choosing to have an event in Germany, which of the following criteria do you think will be more important in 2030 than they are now? Which are becoming more important?"



Source: Study "Future Conferences and Conventions"

# Procedure and Methods

**The study is based on literature and document evaluation, a brainstorming workshop, interviews with experts and the three proven methods of scientific future research: trend analyses, scenario development and roadmapping.**

**Select social models from contemporary social sciences provided the theoretical basis for the trend analyses: Multi-option Society (Peter Gross), (Event) Society (Gerhard Schultze), Risk Society (Ulrich Beck), Second Modernity and Reflexive Modernisation (Ulrich Beck, Anthony Giddens), Post-growth Society (Angelika Zahrt) and Great Transformation (WBGU-German Advisory Council on Global Change).**

Important developments in modern societies were designated as megatrends: globalisation and internationalisation, „peak everything,“ urbanisation, demographic change, feminisation and diversity, technology in work and life, sustainable development, mobility of the future, and security and safety.

The procedure can be understood as the use of an expanding „range of possibilities“ for future developments („possible futures“). Feasible and plausible future developments will no longer be as extensive as conditions become more restrictive. An additional reduction was possible when we focussed on probable futures, which are limited by power structures, customs and technical capacities. These analytical steps could be rapidly dealt with in the study. In the context of „Meetings and Conventions 2030,“ we decided on an even more limited category: „preferable futures.“ These are the developments, activities and effects that are particularly important for the German Convention Bureau, its members and project partners and should be used proactively. They were examined and cla-

rified by the Institute for Future Studies and Technology Assessment (IZT) and during the scenario workshop.

## The Research Process

### **Interviews with experts from the meetings industry and other industries**

22 interviews were conducted with industry experts as well as specialists in the fields of knowledge transfer, technologies and architecture. The 30 to 60 minute interviews took place from January to May 2013. Together with the IZT (Institute for

Futures Studies and Technology Assessment) team, we made a selection that is included in the appendix.

### **Delphi Method**

To evaluate the most important technological developments and breakthroughs for the meetings industry up until 2030, we conducted a survey using the Delphi me-

thod. This took place online in two sessions with 24 German and international experts.

*Information: The Delphi method was designed for strategic and military purposes in the USA in the 1940s by the RAND Corporation, a think tank that advised the US military.*

A group of experts receive a series of questions to be answered anonymously.

## The Research Process and the Instruments



In the second round, the participants evaluate the questions and propositions after receiving a summary of the results. This gives them the opportunity to reflect on their answers and assessments with the help of the group results and to change them if they want. The use of a summary during the second round of the study is basically an exchange of views. All of the respondents' opinions are being considered. Due to the anonymity of the summary, participants can't be influenced by other more dominant participants. Depending on its set-up, a Delphi study can help determine the views of experts (i.e., the probability of a technical invention and when it might come about), collect topic ideas, choose selected issues or get a consensus on certain subjects.

### Online Survey

77 people from the meetings industry were invited to take part in an online survey with select topics from the study.

The online survey was conducted in April and May 2013.

### Scenario workshop

On April 9, 2013, an all-day workshop was hosted in Frankfurt with 20 participants who openly discussed topics concerning the future of the meetings industry as well as possible scenarios.

Seen from our vantage point now, it looks as if the range of possibilities is on the increase. Scientific future research differentiates between (1) „possible;“ (2) „plausible;“ (3) „probable;“ and (4) „desirable (preferable)“ futures. The opportunities and risks are distributed differently, but scenarios can definitely help in describing future conditions. ■

# Imprint

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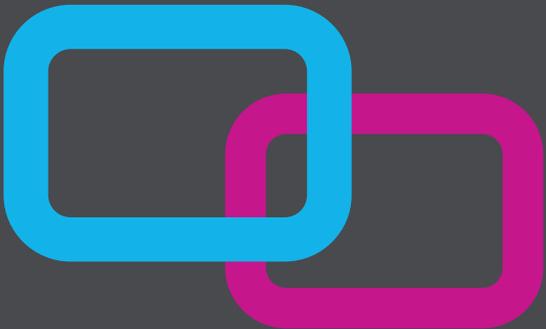
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