IACC
Meeting Room of The Future™
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PREDICTING THE MEETING ENVIRONMENTS OF THE FUTURE & IMPROVING MEETING DYNAMICS

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RESEARCH PARTNER
DEVELOPMENT COUNSELLORS INTERNATIONAL
Volunteers:
Delphine Boisard, Chateauform’, Europe
Jakob Buus, Bautahoj, Denmark
Alan Corlett, De Vere Hotels, UK
Alysia de Saxe, Saxons, Australia
Robyn Domber, Development Counsellors International (DCI), US
Stine Gregersen Kold, Runstedgaard, Denmark
Maria Griffiths, etc.venues, UK & US
Matt Harvey, PSAV, US
Nick Hoare, etc.venues, UK & US
Andrew Hodd, Vantage Venues, Canada
Rik Husken, Kapellerput, Netherlands
Michael Lauritsen, Marienlyst, Denmark
Mariela McIlwrath, Events Industry Council, Global
Alisha Mudbhary, Development Counsellors International (DCI), US
Sylvia Nylin, Svenska Moten, Sweden
Mark Ralph, Warwick Conferences, UK
Ellen Sinclair, Benchmark Hospitality, Global
Jessie States, Meeting Professionals International (MPI), Global
Tracy Stuckrath, thrive! Meetings and Events, US
Mike van der Vijver, MindMeeting, Netherlands

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PREDICT. CREATE. SHAPE. IACC Meeting Room of the Future™ is an initiative led by IACC, with the goal to share the association’s vision on how meeting spaces will look and function in the future. The initiative brings together research, innovation, and trends with the single purpose of predicting, creating and shaping the future of meeting environments.

In order to gain insights on how those in the meetings and events industry are responding to the changing needs and expectations of meeting planners, we surveyed global venue operators and suppliers. As the industry evolves and expands, all key players must adapt: meeting planners are continually evaluating all elements of the meeting experience and operators and suppliers must also ensure they are meeting and anticipating the changing needs of planners.

The surveys, conducted among venue operators and suppliers to the meetings industry, cover several meeting elements including:

- Role in Experience Creation
- Meeting Space/Room Design
- Technology
- Internet & Bandwidth
- Food & Beverage
- Social Responsibility
- Environmental
Venues across three continents took part in the research. The profile of venues surveyed includes a high number of IACC-certified venues, where meetings, conferences and training programs represent between 50% and 100% of their business mix. These venues host an average group size of less than 100 delegates and offer dedicated meeting spaces (not just multi-use function rooms). A separate survey was conducted of venue suppliers, which included global meeting space designers, architects, technology companies, nutritionists, and furniture manufacturers.

Meetings are often places where the most challenging and innovative work of the year takes place. Venues investing time and money into the design of their physical spaces to support the wellbeing and thought process of meeting attendees ensures a meeting is viewed as a strategic investment, which then transforms behaviours, cultures and delivers success for companies.

Below are the meeting venue elements that respondents said will be MORE important in the future than they are now. This report will explore some of the most frequently selected elements in greater detail as we delve into the meetings industry to understand the changes that are taking place, how venues and suppliers can adapt to those changes and what meeting planners should expect to experience at venues.
“Venue operators are committed to running an ethical and socially responsible business.”

Which of the following meeting venue elements do you feel will be MORE important in the future than they are now?

- Socially responsible and ethical operations: 74%
- Flexibility of meeting space (ability to move furniture etc.): 72%
- The food and beverage offer (service styles, presentation and quality): 72%
- Access to interactive technology (i.e. Audience participation, collaborative communication): 62%
- Networking and social places adjacent to the meeting/event space: 60%
- Access to authentic local area experiences: 54%
- Location and access: 52%
- Availability of team building activities: 38%
- Acoustic friendly environment: 36%
- Other (please specify): 6%
The 2020 survey was conducted just before the real impact of the pandemic on the meetings industry was felt. It is a snapshot of perspectives taken based on operating realities in the previous 12 months and compared to the 12 months before that. The meetings landscape and attendee behaviours will undoubtably shift in the next 12 months and IACC feels it is important to keep the report true and publish in 2020. As trends evolve over many years, measuring the industry annually remains critical.

In this report we take the opportunity to include forward predictions of the probable impact of COVID-19.

Outside of this report, IACC updates its daily COVID-19 Resources & Guide to Re-opening web page, offering up information, case studies and venue best practice and experiences, as it pertains to meetings under 200 delegates.
EXPERIENCE CREATION

As younger generations place more emphasis on the overall “experience” of a meeting, we have seen a gradual increase in the share of key players in the industry who indicate that experience creation will become more important over the next five years. Our 2018 study saw just a slight increase in the share of venue operators who said that their role involves experience creation. In this edition of the report, 94% of operators report that their role entails experience creation.

As a venue operator, do you feel it is your role to provide the “memorable experience” element for clients and their delegates?

<table>
<thead>
<tr>
<th>2020</th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>94%</td>
<td>57%</td>
</tr>
<tr>
<td>No</td>
<td>0%</td>
<td>7%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>6%</td>
<td>36%</td>
</tr>
</tbody>
</table>

IACConline.org & IACCmeetings.com
The Venue’s Role of a Strategic Consultant

While our 2018 study found that venue operators seemingly rely more on meeting planners to provide the experience creation element, this year no operators indicated that their role does NOT involve experience creation. As event budgets stay relatively stagnant while costs are on the rise, meeting professionals are relying more heavily on their venue partners to help make choices that maintain the integrity of their brand experiences and education programs.

Venues are responding to these expectations by offering a variety of on- and off-site amenities that help with the experience creation element of meetings. Over the years, team building exercises and ice breakers have grown in popularity while creative meeting rooms and themed food and beverage remain the most common elements.

“Venue partners play key roles in the design of experiences that matter,” says Jessie States, CMP, CMM, director of the MPI Academy at Meeting Professionals International. “Our hosts have held thousands of meetings with a variety of business goals and objectives. They know what works and what wows ... and what doesn’t. They can advise on what elements need more investment and attention — and which can be side-lined in a pinch. As we seek to create experiences that move people, we need our expert partners’ insights to inform our approach.”
Please select all of the elements you offer, either onsite or off-site, to assist with the “experience creation” element of meetings.

<table>
<thead>
<tr>
<th>Element</th>
<th>Onsite</th>
<th>Off-site</th>
<th>Both</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative meetings rooms</td>
<td>81%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Themed food &amp; beverages</td>
<td>67%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Ice breakers</td>
<td>62%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Outdoor meeting rooms/spaces</td>
<td>59%</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Team building</td>
<td>55%</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Team based sporting activities/facilities</td>
<td>36%</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Destination based activities (wine tours, visiting cultural places, etc.)</td>
<td>20%</td>
<td>32%</td>
<td>48%</td>
</tr>
</tbody>
</table>

“The venue staff are a critical part of the attendees experience at a meeting, their engaging attitude, genuine nature and warmth, all add to the memory and experience.”

— Delphine Boisard, Sales Director at Chateaure禀

Mariela McIlwraith, VP Sustainability and Industry Advancement for the Events Industry Council (EIC) further adds that their 2019 State of Sustainability survey found that for the majority of event organisers, sustainability practices need to be either cost saving only (19%) or cost neutral/cost savings (51%). Mariela adds “Event organisers can track their savings online from sustainable practices and use these savings to invest in a sustainable practice that has a material impact and a wow factor.”

— Mariela McIlwraith of Events Industry Council (EIC)
COVID-19 Perspective

Outdoor meeting spaces are highly likely to become more desirable during the next 12 months, as limited contact is observed by attendees. In addition, team-based activities which do not require close personal contact may evolve as part of larger portfolios of group team development activities.

The Expectation to Do More with Less

Across the industry, budgets have remained flat while the demand for unique experiences, advanced technology and enhanced food and beverage offerings continue to rise. As a result, meeting planners must put innovative ideas for enhanced experiences second to budgets. We asked venues if they have experienced this. 66% said ‘Yes’ and that clients are more willing to lower food and beverage expectations compared to technology. Those who said ‘No’ said that their clients still had high expectations despite unchanged budgets.

Are you seeing a trade-off between tight budgets and higher expectations?

Yes

No

Sometimes

66%

27%

7%
Experience Creation on a Budget

Among the 66% who do offer enhanced experiences on a limited budget, many do so by turning to personalisation and creating bespoke experiences to fit the budget rather than selling from a ‘price list’.

Tracy Stuckrath, a supplier from thrive! meetings and events, says suppliers can work better with venues to create stronger and more memorable experience for their clients by “getting to know the client’s attendees themselves, and not relying on just the client’s point of view.” This can be achieved through surveys, chats and reading comments from previous events.

Tim Chudley from Highgate House in the UK, which has its own separate business dedicated to experiences, finds that “when the venue sells the experience rather than the facilities/location, the trade-off between tight budgets and high expectations is less of an issue.”

Venues that offer budget-friendly packages maintain the quality of their experiences through being creative with their use of space and/or including modified food options (such as sustainable or healthy options) among others.

COVID-19 Perspective

We may see that meetings in the next 12 months add budget to the experience creation, as they seek to gain more social value from a smaller number of meetings. The value of attending an in-person meeting for an attendee may increase. Mike van der Vijver, Meeting Designer with MindMeeting from the Netherlands, expects a shift from meetings with high ‘information density’, such as traditional conferences, to greater importance of effective networking and experience creation.
Our survey of meeting planners in the 2017 and 2019 Meeting Room of the Future reports showed that there is agreement that meeting venue environments strongly impact how delegates interact, learn, and communicate, resulting in increased productivity. As planners source out the spaces that foster the most productivity, there are several things they look for and according to venues, the types of physical spaces they look for are vastly different today than they were five years ago.

Venue operators’ description of their dream meeting room perfectly matches those of meeting planners’ from our 2019 report:

1. Open
2. Flexible
3. Bright
4. Fun
5. Well-equipped with technology
Nick Hoare Chief Operating Officer at etc.venues in the UK and US comments on the findings: “These findings are certainly supported by our continuous evolvement of new venues with the latest one being Chancery Lane London. The venue offers built-in AV, all day service, artistic flairs and architectural quirks across meeting rooms as well as spacious lounge areas. There is a balanced contemporary workspace design with an urban street feel that has been designed to inspire, interact, and get creative in a more stimulating and inclusive setting. The venue features a vast opening lounge with both formal and informal zones to work, rest, and play. We are very much in tune with what our customers are looking for and Chancery Lane is an example of a great collaborative space coming away from the traditional offering of syndicate rooms and trainer’s offices.”
**COVID-19 Perspective**

Post-pandemic, there will be heightened demand for spaces that limit exposure and reduce the likelihood of getting infected. Some examples of venues and rooms that will hold higher priority are: rooms with more than one doorway to offer delegate flow by dedicating one entrance and one exit, private but spacious group social spaces immediately outside the meeting room and venues with limited or no access to the general public in key areas. In addition, venues with modern quality hard top desks (rather than clothed tables) will be best suited to maintain the highest standards of sanitation.

Nick Hoare of etc.venues further comments “we are adapting our operations by offering 25% more room free of additional charges. We can offer many of our spaces exclusively which will minimise exposure to general public or other groups. It will be interesting to see if demand for certain venues will increase as repurposing and remodelling of client’s office space is considered, with the creation of more collaboration and creativity areas replacing rows of desks. In addition, working from home may become more of a norm and might result in a greater need for teams to come together in a more structured environment offered by smaller meeting venues.”
Growing Importance of Multi-Functionality

Tight budgets, tight spaces and evolving expectations are difficult to change or control, but these problems can be addressed through multi-functional spaces and furniture. The trend towards multi-functional and flexible meeting spaces is escalating. In 2017 and 2019 editions of Meeting Room of the Future reports, meeting planners consistently indicated their preference for flexible layouts. This year, when respondents were asked what elements of a meeting they feel will be more important in the future, “flexibility of meeting spaces” was the second most popular answer with 72% of respondents saying this feature will be more important (graph on page 6).

What percentage of your meeting rooms have furniture/equipment which allow flexible layouts?

- 100%: 2017 - 28%, 2018 - 37%, 2020 - 33%
- 99%-75%: 2017 - 3%, 2018 - 4%, 2020 - 0%
- 74%-50%: 2017 - 9%, 2018 - 4%, 2020 - 4%
- 49%-25%: 2017 - 0%, 2018 - 0%, 2020 - 0%
- Less than 25%: 2017 - 0%, 2018 - 0%, 2020 - 0%
- None: 2017 - 0%, 2018 - 0%, 2020 - 0%
Jared Long of The Inn at Villanova University in the U.S. finds that his clients “are not looking for the same layouts now as they were previously; for example, instead of a classroom setup they want something more collaborative.” As meetings comprise different modes of learning — auditory, visual, and collaborative — a flexible layout allows for seamless reconfiguration without interruption. Shifting layouts provides a sort of “change in scenery” that can be invigorating and creatively stimulating for attendees.

Most of the venue operators we surveyed (81%) indicated that 75% or more of their meeting rooms have furniture that allow for flexible layouts. This number has gradually increased since 2017 (69%) and in 2018 (74%), making the trend towards flexible layouts more evident.

**Third Spaces and Breakouts**

While the flexibility of meeting spaces has and will continue to become more important, flexible furniture in non-meeting spaces is also growing in importance. Rik Husken of Kapellerput Hotel in the Netherlands says that all their furniture is flexible, “not only those in meeting rooms but also the tables and chairs in restaurants, bars, cafes and public foyers.” Using these third spaces as work cafes, breakout rooms or networking lounges is a great way to foster further collaboration and build trust among attendees. Tim Chudley of Highgate House in the UK says he has seen an increase in clients who ask for “more relaxed, less formal spaces while also desiring a return to more formal settings. These clients are now happier to use shared spaces, lounge areas, bars and more.”
Both the venue operators and suppliers surveyed tend to agree that breakout rooms are used more now than they were before. Suppliers also report increased demand for smaller rooms (90 pax. or less) and decreased demands for larger (100 pax. or more) fixed seating rooms. Many operators strongly agree that their venues will offer more collaborative/networking meeting space outside of the meeting room in the next three years to meet growing demands.

European 65 venue brand, Chateauform', note that it is good to have easily movable chairs and flipcharts so that participants have the option to form breakouts in the garden for example.

**COVID-19 Perspective**

This aspect of meeting environments may experience the most radical change in preference, as fixed, well-spaced meeting room layouts are required to avoid attendees moving seats closer together and breaking health guidelines. There is likely to be careful consideration given to different physically distanced room layouts that support different meeting objectives. In addition to this likely change, the downward curve of group sizes may become even more prominent.
Meeting Space Furnishing

When asked what types of furniture they are incorporating to help facilitate collaboration and flexibility, venue operators most frequently said:

1. Lounge furniture (couches, bean bags, soft-seating, pods, armchairs)
2. Variety of styles of tables and chairs, especially differing heights
3. Furniture that is easily movable (easy-to-carry furniture, furniture with wheels)

These findings are the same as our 2018 survey of venue operators. Venues report an increase in providing furniture that allows for flexibility in movement and position (sitting versus standing) as it fosters fireside chat environment and opens viewing angles. Many venue operators attribute the increase in lounge furniture to the preferences of the new generations of meeting attendees: millennials and post-millennials. Because of their lower need for privacy than previous generations, millennials thrive in collaborative and comfortable environments. Just as offices have transformed to build what is most conducive to these younger generations’ productivity, so have meeting spaces. Millennials have shifted the meaning of professionalism towards a more relaxed culture for most of the Western world regardless of what generation one may fall into. As a result, details such as lounge spaces that evoke feelings of home help build trust and comfort and foster further collaboration and productivity.

Respondents also noted that offering furniture that gives attendees the flexibility to sit or stand is also growing increasingly common with many spaces offering regular soft-seating coupled with high-boys in the back. This is another trend that operators attribute to millennials and their seemingly short attention spans.

“While space and furniture design will be evolving to meet these new cultural preferences, venues and planners alike must still be aware of the needs of delegates and guests with disabilities. Spaces, seating options, signage and flow should allow for all participants to be able to access and use the space equally.”

— Tracy Stuckrath from thrive! meetings and events
COVID-19 Perspective

Venue operators should look out for changes in attendee behaviour in the early days and weeks after the serious threat of infection recedes. The forming of groups in the social spaces outside of meeting rooms is likely to be less popular in the short-term.

Human-Nature Connection

In addition to spaces that allow for movement throughout the day, spaces with a more home-like, colourful and natural touch also help boost morale and productivity during meetings. Julian Kettleborough of The Studio Venue in the UK says that clients “tend to be more ‘creative’ with the spaces they need. Generally, there is an enthusiasm for more colourful spaces and clients are making it their preference not to use brand environments.” Stine Kold of Rungstedgaard Hotel in Denmark adds that “atmosphere and comfort means more today even for pure business meetings.”

This falls in line with prior research from Steelcase Event Experiences which found that all humans innately crave human-nature connection, even during business meetings and that elements like fresh air, lush greenery, use of nature-inspired materials and natural lighting go a long way to re-charging event participants, increasing productivity and improving overall wellbeing.

Mariela McIlwraith, of Events Industry Council adds that biophilic design concepts have a clear connection with attendee wellbeing when incorporated into venues. The biophilia hypothesis proposes that most humans have an innate love of nature — we long for it and without connecting with it, our health could suffer. So, biophilic design is an applied solution to appease this desire for nature by integrating natural elements and processes into the built environment.
Of the operators surveyed, 73% said they provide human nature connection of some sort. Some common ways respondents provide human nature connections include:

- Artwork hung throughout the meetings spaces and/or property
- Maps of walking and running trails
- Well designed outdoor spaces used for events and/or recreational use
- Ambient soundscapes

Venues without much greenery or outdoor spaces can also provide human nature connection through the use of soundtracks, placing plants and artwork around the meeting space or property, using furniture made from (or that resemble) natural materials, incorporating natural light and much more.

Delphine Boisard from Chateauform’ UK & USA says that having a memorable feature in the meeting room (which can be anything from a quirky coat hanger to accent pillows) makes a difference as it helps break the ice when participants arrive and helps them distinguish their own meeting room from the others after refreshment breaks. Adding unique touches can also help with marketing as they are “Instagrammable” — an especially important characteristic to have during the digital age.
Barriers and Tensions

For the third year, cost of investment and product storage issues remain the greatest barriers to investing in new furniture/equipment.

Opting for stackable conference chairs offering ergonomic seating that is now widely available from leading suppliers can help venues overcome these barriers. It is particularly difficult to find creative and trendy furniture (especially lounge furniture) that is economical and easy to store. Outsourcing rental of furnishings can offer an opportunity to address this challenge while simultaneously enhancing experience creation for attendees.

On the bright side, slightly fewer venue operators report experiencing each of the barriers listed. While a larger share, 26% (up by 8% compared to 2018 and 2017) report that they face ‘no barriers’ to flexible meeting space.

In the face of tight budgets and tight spaces, multifunctional spaces and furniture can help venues overcome a multitude of barriers. Mariela McIlwraith of EIC further adds that venue operators who consider the environmental impact they have on the planet, considering the circular economy when re-purposing old furniture and equipment, will be heightening their social impact.

What barriers are there, if any, to your venue offering more flexible meeting spaces which would provide your clients with different types of layouts? (Please select all that apply).

- **Cost of investment**
  - 2017: 58%
  - 2018: 56%
  - 2020: 56%
  - 2017: 65%

- **Product storage issues**
  - 2017: 50%
  - 2018: 56%
  - 2020: 56%

- **No barriers**
  - 2017: 18%
  - 2018: 18%
  - 2020: 26%

- **Product innovation**
  - 2017: 13%
  - 2018: 16%
  - 2020: 8%
Buying is Still More Popular to Hiring

Despite the constant advancement of technology, 91% of venues continue to outrightly purchase new technology equipment when needed. The cost of high-quality audio-visual technologies is decreasing due to consumer demand.

Matt Harvey, VP of Specialty Services PSAV highlighted a growing trend in venues purchasing AV as a service under a leasing model with AV installed and services such as maintenance and repair added. “With AV playing a role in the experience creation, think lighting, projection mapping etc., the ability to lease more with less financial up-front costs may allow venues to pivot quickly with new offers.”

When purchasing and evaluating new technologies, venues’ own on-site staff are the most trusted and preferred consultants to their leadership and owners. Not only do they face the consequences of their own tech purchase decisions every day, but they also are more likely to use the venue’s built-in technologies thus reducing cable clutter.

When a technology upgrade is needed, who evaluates potential new technology and equipment?

- On-site (venue-employed) technology support staff 67%
- A/V contractor supplying on-site permanent tech support 16%
- Other (please specify) 13%
- A/V contractor providing tech support staffing on a per... 4%

Respondents were also asked what they believe are the most essential AV and IT equipment for quality meeting experiences. Interestingly, device charging stations are among the top five essential equipment among the must-have equipment such as data projectors, flat panel screens and speaker systems.
What do you consider as essential AV & IT equipment for today’s quality meeting experience? (Please select all that apply).

- Data projector: 78%
- Flat panel screen: 78%
- White boards: 68%
- Attendee device charging stations: 62%
- Speaker system for audio playback: 62%
- Desktop or laptop computer: 60%
- Wireless screen sharing (i.e. Click share): 58%
- Paper-based flipcharts: 56%
- Electronic flipcharts: 24%

Suppliers again this year report seeing increased demand for portable technologies like LCD flat panel and data projectors; venues must ensure that they have the infrastructure in place to handle these devices.

COVID-19 Perspective

Although charging stations have recently grown in popularity, they may be less popular among attendees as they look to limit the number of shared surfaces they touch (due to threat of infection). As attendees bring their own chargers, this may result in a shortage of electrical outlets in venues.

Maria Griffiths of etc. venues in the UK expects to see more innovative use of mobile technology to reduce contact. This may include mobile event registration, attendee badging and even remote opening of doors.
Collaborative Technologies

Younger generations of meeting attendees use technology to collaborate and stay connected than ever seen before. As attendees expect spaces and activities that foster collaboration, technology must play the role of facilitating that collaboration.

In our 2019 Meeting Room of the Future survey, meeting planners reported that access to interactive and collaborative technology will be more important in the next five years. The number of operators that indicated that their venues offer collaborative technologies increased from 43% in 2017 to 63% this year. Despite the growing demand, we still find that 37% of venues do not offer any form of collaborative technologies. When it comes to offering this service for free versus for a cost, operators are equally split in their practice.

Please indicate which technology based products and services you offer (please choose all that apply):

- Technology that enables remote participants or remote presenters to join the conference: 55%
- Live events streaming: 48%
- Digital signage: 45%
- Screen sharing technology: 45%
- Audience participation/social q&a: 36%
- Live slide sharing: 20%
- Other: 16%
- Conference apps: 16%
- None of the above: 14%
- Beacon/GPS delegate tracking: 2%
Matt Harvey of PSAV comments that collaborative tech can be costly and therefore is not an investment venues can make without proof of value. Third-party providers can be a cost-effective source and can also offer more detailed set up and monitoring. Matt Harvey further highlights that free services are often unsupported and risk leaving planners to fend for themselves in times of need.

Video conferencing (including live event streaming and technology that enables remote participants) and screen sharing technology continue to be the most offered products. However, it is important to note that use of video conferencing hardware has declined significantly given that it is a large investment and that cheaper cloud-based alternatives (like Zoom, GoToMeeting and WebEx) are now much more widely used. However, they must be supplemented with the associated hardware like lighting, cameras and microphones.

Definitions:

- **Video Conferencing** – Typically involves a small group of people talking and collaborating virtually.
- **Webinar** – Typically involves 1-3 speakers delivering a presentation to a larger audience. Mainly one-way with some Q&A managed by muting microphones, polls or other interactive tools.
- **Live Stream/webcast** – One-way push of content for a very large online audience. Often no voice/video collaboration option for participants.

In addition, touchscreen and interactive displays or boards (such as SMART boards) are also listed as products that do not warrant the investment. According to operators, they are rarely used by clients as they are not intuitive to use without technical support. This was also seen in our 2018 edition of the study. Given the investment in this area by major technology companies (such as Microsoft with their SurfaceHub) technology, this is a particularly troubling finding for hardware companies with related products.

As venues build upon their arsenal of collaborative technology offerings in a multitude of spaces, venue bandwidth capacity meeting demand will become crucial to the success of meetings.

“Smaller meeting room AV systems will need to be capable of hooking into corporate Microsoft Teams or Zoom accounts in a way that is effective for the size of the meeting room and number of people using hardware such as Crestron’s Mercury All in One Meeting Solution. Venues need to be prepared to talk about these solutions or offer access to a hybrid event production provider.”

— Matt Harvey from PSAV
COVID-19 Perspective

Jessie States of MPI believes that we will see more venues investing in low and no-touch technological solutions for everything from check-in and registration to meal and drink delivery and more.

COVID-19 will leave a legacy of people being much more comfortable with participating and engaging remotely at meetings in future. Venues have already factored into their re-opening plans, the need to offer new services and staff to support hybrid events, with remote attendees participating. It is further anticipated that there will be gaps in knowledge and ability for those who arrange meetings, to be proficient in adding a hybrid element and will seek solutions where this can be offered by the venue.

Mariela McIlwraith of EIC anticipates seeing individually packaged and sanitised speaker kits with microphones, slide advancers and cloud-based presentation management rather than USBs.

In addition, companies with meeting attendees from multiple locations may choose the multi-hub approach and bring smaller regionalised groups together and then use technology to join these groups. For IACC venues, who collaborate extensively, this presents an opportunity to assist with multi-hub meetings.
The Bandwidth for Collaboration

Availability of high-quality internet has consistently been rated the most important by venue operators, meeting planners and suppliers across several editions of our study. Its importance is only growing with increasing reliance on cloud resources and collaborative technologies. As Director of AV Technology at Convene, Michael A. Judeh, puts it: “Internet access has become a basic utility like electricity and running water”.

Attendees today come to meetings with not just one, but often two or three devices. When this is coupled with the varied and abundant technologies already present at venues that also use its broadband, it can spell trouble for those that have not adequately planned their internet infrastructure.

As the use of these portable technologies grow, it must be met with an understanding of the connectivity requirements of these new devices.

While our 2018 research found that only around 40% of venue operators indicated that their guest rooms, public spaces, and meeting rooms had 150Mb/s or less of bandwidth available, this year’s results paint a vastly different picture. Today around 80–90% of venue operators report that they have over 100MB or more of bandwidth available. This is evident of growing demands for improvements in bandwidth and connectivity. IACC’s Online Bandwidth Calculator, adapted for smartphone and tablet use, is a useful tool for planners and venues in evaluation.
Please indicate the bandwidth (in MB) available in each area of your venue (meeting rooms, public spaces, guest rooms).

<table>
<thead>
<tr>
<th>Bandwidth</th>
<th>Guest Rooms</th>
<th>Public Spaces</th>
<th>Meeting Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 GB/s or More</td>
<td>43%</td>
<td>37%</td>
<td>40%</td>
</tr>
<tr>
<td>999–500 MB/s</td>
<td>7%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>499–300 MB/s</td>
<td>7%</td>
<td>6%</td>
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<tr>
<td>299–200 MB/s</td>
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<tr>
<td>199–100 MB/s</td>
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<td>3%</td>
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<tr>
<td>Less than 50 MB/s</td>
<td>7%</td>
<td>8%</td>
<td>2%</td>
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</table>

**COVID-19 Perspective**

Increasing demand for hybrid meetings will only add to the demands on internet infrastructure in venues over the coming months and possibly years. When evaluating a venue in the future, it is anticipated this will become a higher priority and, therefore value, for buyers.

Maria Griffiths of etc. venues in the UK and US feels venues offering hybrid meeting related services can use this as an important factor in place of further pressures on pricing which may materialise.
Guaranteed and Free Broadband

Despite the strides made in venues’ internet capacity, connectivity issues still occur frequently. As a result, many meeting and event planners are spending more time evaluating that a venue can guarantee high quality internet. Some are even creating back-up plans in the event of internet issues mid-event. Our 2019 Meeting Room of the Future research found that 44% of meeting planners would not even consider a venue that does not provide that guarantee. An even larger majority (56%) indicated that affordable (or free) high speed wireless internet will be the most critical technology needed for meetings in the next five years.

Venues are already investing more in their internet connectivity — 73% of operators report investing in their internet in the last two years and 44% are planning to increase their investment in internet bandwidth in the next 12 months.

Almost all operators surveyed (98%) indicated that their venues provide free internet to meetings, indicating that this is the new norm. Although 82% of venue operators report that they feel they are offering sufficient bandwidth, it will be important to stay ahead with further improvements to connectivity in order to remain competitive in a market saturated with venues with free, high-quality internet. As the need for quality solutions increases, the investment in these areas also increases and may put pressure on the need for free internet-related services (for instance, free tech support). With hybrid having the potential to be a new addition to more live events, this may result in a second-tier service and pricing model for internet provision from venues.

![Have you invested in your internet infrastructure and/or hardware in the last 2 years?](chart)

- Yes; 73%
- No; 27%

![Are you planning to invest in your internet infrastructure and/or hardware in the next 12 months?](chart)

- Yes; 44%
- No; 56%
Cybersecurity

In the race to win over planners with new technology integrations and high-speed internet, cybersecurity must not be overlooked. Although they are uncommon, events are still vulnerable to a variety of cyber-attacks. Numerous operators report having been victims to phishing attempts, wire transfers, booking system hacks and other data breaches. Whilst guest Wi-Fi almost always is separated from the operator’s network, it needs to have a robust separation so that meeting planners and attendees that use a venue’s technology are not vulnerable to a wider network used by venue operational teams.

Meeting planners were asked to rate on a scale of 1 (strongly disagree) to 10 (strongly agree) how much they agree with a set of sentences pertaining to cyber security. Many agree that cyber security is a concern when implementing new event technologies and that it will become a greater priority in the next few years as we rely on technology further. It is important for venues to uphold security standards and provide reassurance to planners.

How much do you agree or disagree with the following statements? (1 = Strongly Disagree; 10 = Strongly Disagree)

- Cyber security will become a greater priority in the next 3-5 years 8.8
- Cyber security is a concern when implementing new event technologies 8.8
- I have had to deal with cyber security issues in past events 4.4
COVID-19 Perspective

Matt Harvey of PSAV reports “There has been much discussion in the media about the relative security of available cloud collaboration platforms. Many of these platforms now include enhanced security on a paid for, enterprise version. Venues will be well placed to offer enterprise versions of tools and advise planners of the risk of free personal platforms.”

Virtual Reality

Another new technology trend that unlike cybersecurity, many in the industry have yet to embrace is virtual reality (VR). VR is not reserved for just video games and entertainment; early adopters of VR in the meetings and events industry are showing that it can be just as powerful in event planning, promotion, and engagement.

Technology consultant Corbin Ball, president of Corbin Ball Associates says: “There’s going to be a lot of changes in the next two to three years as VR products work their way into the consumer market. And as they become a regular part of the consumer playing field, they’re going to work their way into events.”

Virtual site tours eliminate the time-consuming nature of site visits for meeting planners with busy schedules and allows for planners to easily involve key stakeholders in the decision too. Compared to regular virtual tours, virtual reality tours provide an elevated illusion of reality, making planners feel like they are experiencing the site for itself. Mariela McIlwraith of EIC also views VR for venue appraisal as supporting the reduction of our carbon footprint of travel.

Virtual reality can also be adopted for educational purposes. Microsoft’s HoloLens, which offers a mixed reality experience through projecting holographic images in the physical space, is one tool that those in the events industry have their eyes on. This type of technology could be used during meetings rather than PowerPoint’s to create a more immersive and memorable participant experience.
Virtual reality could have a multitude of other uses in the industry for all key players and is an important technology to keep in mind.

Matt Harvey of PSAV feels augmented reality is likely to be a key developing driver within events, citing Apple Glasses as one breakthrough product likely to support further augmented reality incorporation.

**COVID-19 Perspective**

54% of venue operators indicate that they either offer VR tours today or are planning to offer it in the next 12 months. Due to the onset of COVID-19, we expect this number to increase drastically in the next few quarters. This was seen in a similar study of meeting planners from around the globe conducted by NorthStar Meetings Group during the week of April 14th. They find that due to COVID-19, 76% of meeting planners expect that they will require more virtual site visits.

**When considering virtual reality venue tours...**

- We do not plan on offering this: 46%
- We offer this today: 32%
- We are planning to offer this in the next 12 months: 22%
Refreshment Breaks

As seen in previous editions of the study, frequent refreshment breaks continue to grow in popularity and venues are continuing to develop their offering of break stations.

The majority (93%) of venue operators we surveyed offer continuous refreshment break services, this number has jumped up significantly from 80% in 2018 and 77% in 2017, indicating a clear trend towards frequent refreshment breaks.

Do you offer continuous refreshment break service throughout the day for your meeting delegates?

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2018</th>
<th>2017</th>
</tr>
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<tbody>
<tr>
<td>Yes</td>
<td></td>
<td></td>
<td>93%</td>
</tr>
<tr>
<td>No</td>
<td>2%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>5%</td>
<td>20%</td>
<td>19%</td>
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</table>

COVID-19 Perspective

While physical distancing remains either a directive or habit for attendees, restrictions to the past open and shared format for break stations for multiple groups will be altered and group designated stations, with serviced items by venue staff will be adopted, possibly at fixed times in the day.

“We will see a lot of changes to meals and break times, mainly including pre-packaged options (at least in the early days of re-opening) with Grab & Go options. Fixed break times will play an integral part allowing venues to utilise restaurant spaces effectively and reduce cross-contact of groups.”

— Maria Griffiths from etc.venues, UK & US
Organic Food

Consumers in general are eating more organic food and using more organic products than ever before, according to the 2020 Organic Industry Survey released by the U.S. Organic Trade Association. There is a clear trend towards transparency in food processing and sourcing and this is also reflected in meeting attendees’ preferences.

However, 67% of venue operators feel that there is a substantially higher cost to serving locally sourced and/or organic foods. Among those who agree, respondents are equally split between whether or not they pass on this higher cost to clients with 42% saying they pass on the cost, and a slightly larger share (58%) saying they do not.

“Organic foods have always been available and I do see their popularity rising but along with that the price of items has significantly gone up. If you have the money and the customer base willing to pay extra for organic items then enjoy, but as we all look for profitable ways to restart Food & Beverage in our properties, extra cost is going to be hard to accommodate with all the new associated costs of cleaning, sanitising, PPE’s and labour to open the doors.”

— Murray Hall, Executive Chef at Dolce Hotels and Resorts, Global

Murray Hall, Executive Chef at Dolce Hotels and Resorts adds that “guests are looking more for the traceability of where their food comes from and the push for local is much stronger now than I feel it has been. However, depending on where you live in the world (like Canada) local produce only starts with any significant variety in late May beginning of June till about the
end of October. The rest of the year we are highly dependent of fresh produce from other countries.” Chef Murray highlights that there is a gap in knowledge wherein meeting attendees are unaware that local produce is difficult to come by in some regions of the world during certain times of the year. Nevertheless, venues must get creative in how they tackle this issue. Chef Murray does this through looking for “many local items outside of seasonal items such as maple syrup, meats, artisan items, beverages and signature products to highlight the local area year-round.”

**Accommodating Specific Dietary Needs**

When respondents were asked to respond ‘true’ or ‘false’ to the set of statements in the graph below, a large share agreed that in the past year there has been an increase in the number of requests to accommodate dietary preferences and requirements. Meeting and conference guests have broadened palates from experiencing a variety of global cuisines and culinary creations — as a result they have developed sophisticated palates. Many are also conscious of their diet and how their body reacts to different foods and so, they are more aware of their dietary restrictions and have more specific preferences. A 2019 study, “Prevalence and Severity of Food Allergies Among US Adults” found that 10% (26 Million) U.S. adults have food allergies, more than double what has been previously reported by the U.S. Centers for Disease Control.

Justin Griffith of RLA Learning and Conference Center in the United States shares that he has seen last minute requests for “special menus made the day of event for attendees on diets and attendees requesting calorie, sodium, and other specific content information for food”.

Julian Kettleborough of The Studio Venue Company, shares that it is difficult to balance healthy diets with healthy appetites and find a solution to accommodate all delegates — a sentiment expressed by many other venue operators and suppliers alike.
This explains why our results show that operators agree more with the importance of accommodating dietary preferences, incorporating sustainable practices, promoting healthy eating, and providing nutritional and allergen information over offering outdoor dining options and themed-specialty events. The Events Industry Council often uses the acronym FLOSS to highlight this importance:

- Fairly sourced
- Local
- Organic
- Seasonal
- Smart (Brain Friendly)

<table>
<thead>
<tr>
<th>Does your venue provide...</th>
<th>Yes</th>
<th>Unsure</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food labelling with allergen information at every meal (breakfast, lunch and dinner)</td>
<td>82%</td>
<td>3%</td>
<td>15%</td>
</tr>
<tr>
<td>Allergen training for all staff managing food preparation and food service</td>
<td>79%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>Dietary management training for all staff managing order taking, food preparation and food service</td>
<td>77%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Food labelling with allergen information at every break station</td>
<td>72%</td>
<td>5%</td>
<td>23%</td>
</tr>
</tbody>
</table>
Please indicate if each of the following statements are true or false in relation to your venue’s food and beverage offerings:

- **True** - **False**

In the past year there has been an increase in the number of requests to accommodate dietary...

- 95%
- 5%

We have made significant changes overall to our food and beverage offerings in the last year

- 74%
- 26%

It is important to promote healthy eating and active living and this is reflected in the food and...

- 92%
- 8%

We should provide better allergen information on all or most of our food and beverage offerings

- 72%
- 28%

We should provide better nutritional information on all or most of our food and beverage offerings

- 71%
- 29%

There has been an increase in offering evening activities, beyond simply bar service after dinner

- 61%
- 39%

We offer more outdoor dining options currently than we have in the last year

- 43%
- 57%

We offer more themed-specialty events currently than we have in the last year

- 46%
- 54%
With EU requirements on labelling for allergens, and US requirements for providing nutrition information on menu items, providing more details about the contents of a dish is becoming a standard. Our findings show that the majority of venues provide food labelling, allergen training and dietary management training — indicating that emerging dietary and allergen needs are being considered by venues. Yet, 15%–23% of venues still are not providing adequate training and allergen information — this is particularly more common for foods offered at break stations, as 23% of venues say they do not offer allergen information at break stations. Once venues become better at clear and detailed food labelling, planners may experience slightly fewer special requests. IACC, in collaboration with thrive meetings!, have developed a range of dietary and allergen training for venues to support the required change.

While labelling is easy, choosing a menu that will satisfy such a complex and diverse set of guests is certainly not. As outlined in our 2018 Meeting Room of the Future Report, some solutions that may address this are:

- Less meat, more vegetarian and vegan, plant-based and water-friendly dishes featuring seasonal fruits and vegetables.
- Carbon-friendly and plant-forward dishes.
- Locally produced and sourced dishes that showcase the destination while providing transparency
- Dining as entertainment (i.e. food trucks and markets, cooking classes and more).
- Universal design concepts which exclude common allergens and are presented in ways that meet accessibility needs?
This plays into an overarching theme of wellness, according to MPI’s Jessie States. According to the May 2020 Meetings Outlook quarterly research, 79% of meeting professionals say that their organisations are showing an increased interest in wellness at events. Though the survey was conducted in March, the data suggests this interest is not driven from the current health crisis. Rather, meeting professionals say it is driven by attendee interest in mental and physical health and wellbeing (50%) and organising staff desire to provide for healthy experiences (32%).

Maria Griffiths of etc.venues adds “Dietary needs have increased in recent years as the survey shows. People are more particular about what they eat; there is a balance in establishing a dietary requirement compared to a dietary preference. Continuous training of our team is key, as it’s often impossible to plan for needs where we are not advised in advance. It’s how we react to this “in the moment” that is important whilst also limiting food waste.”
As was the case in previous editions of this study, customer feedback remains top of mind for venue operators when deciding how to invest in resources, followed by national competitor product and service offers.

In recent years, as venue operators become more interested in industry research and trends reports, IACC research has gained popularity this year among the venue operators surveyed. Interest in global competitor product and service offerings have also increased in 2020.

It is important for venues to look at all these factors holistically. While observing competitors can provide useful intel on what sort of offerings do well, it only takes into consideration the events of today without considering future possibilities influenced from outside of the immediate meetings and hospitality industry. Research reports, when used in conjunction with competitive analysis, can provide an understanding of why competitors and others in the industry behave the way they do, what the future holds, and how to best adapt to trends and changes.
Millennial Influences

One major change that is important to take into consideration is the growing force of millennials. As previously touched upon in the meeting furnishing section, millennials currently make up the largest generation in the workforce and are shaping behaviours in professional settings.

New trends that are emerging, such as comfortable lounge-like furniture, frequent refreshment breaks, networking spaces, are largely brought about by the specific needs and preferences of millennials. Yet, when venues were asked if they do anything to specifically address the behaviours and needs of millennials, only 41% said ‘Yes’, indicating that half of venues are not yet creating meeting environments that are conducive to the productivity of the largest generation in the workforce.

To better address the needs of millennials, a good starting point may be to hire them. While the operators surveyed have an average of 40% millennial staff, only an average of 18% of them are in leadership positions, able to influence key decisions and ensure they are delivering appropriately to millennial delegates.

“Millennials will also have different expectations about content programming. Venues should expect shorter, more dynamic sessions and should be ready to provide clients advice on how to optimise their meeting programs.”

— Mike van der Vijver, Meeting Designer with MindMeeting
Out of the total workforce, what proportion or millennials are employed by your venue?

- 25%–0%: 35%
- 50%–26%: 35%
- 75%–51%: 23%
- 100%–76%: 7%

What percentage of your millennial workers are in leadership positions or able to influence key decisions?

- 25%–0%: 79%
- 50%–26%: 10%
- 75%–51%: 8%
- 100%–76%: 3%

Those who haven’t already need to be hyper-focused on the needs of Generation Z — whose birthdays starting in the mid- to late-1990s now place them as cohort pacesetters entering the workforce, according to MPI’s Jessie States. “Defined by their entrepreneurial spirit and belief in social justice and environmental responsibility, these young professionals will co-define the future of experiences. Event owners will be applying Gen Z’s core values into their experience design.”
In our 2019 Meeting Room of the Future Report, when meeting planners were asked what the most important venue elements would be for the future, they ranked social and ethical practices as the second most important element. In this edition of the study, we asked venue operators the same question and they ranked social and ethical practices as the most important element (graph provided on page 6).

Growing climate concerns has made the “sustainable lifestyle” an imperative. CGS, a global provider of business applications, enterprise learning and outsourcing services, found in their 2019 Retail and Sustainability Survey that more than two-thirds of respondents consider sustainability when making a purchase. Several other studies, including the Event Industry Council’s 2019 State of Sustainability study have found similar results where consumer’s environmentally conscious choices are extending to almost every industry and they are bringing their preferences along with them to meetings.

The impact that venues can have on their staff, their attendees and their local communities’ social responsibilities is considerable. Inspired by this, IACC’s Better Tomorrow global program was launched earlier this year. IACC sees a post COVID-19 future where being socially conscious and active will be more important as a result of our experiences from the pandemic.

### Does your venue have in place...

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<th>Item</th>
<th>Unsure</th>
<th>No</th>
<th>Yes</th>
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<tbody>
<tr>
<td>The ability to manage food waste</td>
<td>3%</td>
<td>8%</td>
<td>89%</td>
</tr>
<tr>
<td>A program to reduce the consumption of single use plastics</td>
<td>8%</td>
<td>10%</td>
<td>82%</td>
</tr>
<tr>
<td>Environmental or sustainability policy statement</td>
<td>5%</td>
<td>15%</td>
<td>80%</td>
</tr>
<tr>
<td>Community giving activities for all staff to participate in</td>
<td>5%</td>
<td>21%</td>
<td>74%</td>
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The ability to donate unused food to local community outreach programs | 13%    | 23%| 67% |
As planners pick up on this, they are also more likely to consider venues that operate in a more environmentally friendly way. We asked respondents about the different sustainable practices that their venues offer. 89% of all respondents said their venue manages food waste. Closely followed by programs to reduce the consumption of single-use plastics, which 82% of venues currently offer. IACC’s own European Chapter, representing over 140 venues, signed up to a pledge in 2019 to eradicate single use plastics.

When it comes to single use plastic products, our results show 69%–61% do not use single use drink cups, indicating a movement towards eliminating single use plastic products. However, just over half of venues surveyed (56%) still offer drink products in plastic bottles. It is typical to give out plastic water bottles to attendees at meetings to ensure hydration and many venues still continue to do this, however, as we find that 82% of venues now have in place programs to reduce the consumption of single use plastics, plastic bottles will soon be replaced with mugs and beverage/water dispensers.

Does your venue offer

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<th>Unsure</th>
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<th>Yes</th>
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<tbody>
<tr>
<td>Single use hot drinks cups in meeting rooms</td>
<td>0%</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>Single use hot drinks cups in guest rooms</td>
<td>8%</td>
<td>31%</td>
<td>61%</td>
</tr>
<tr>
<td>Drinks products in plastic bottles</td>
<td>0%</td>
<td>44%</td>
<td>56%</td>
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</table>
One particular sustainable practice that only 23% of venues say they do is ‘donating food to local community outreach programs’. Justin Griffith of RLA Learning and Conference donates to the outreach group Mission for Mars; Peter Angelis of UCLA Luskin Conference Center donates to the UCLA student food closet and a campus group that deals with economic crises.

Sustainable and ethical practices and messages can be implemented beyond just the policy statement and food elements of a venue. It can be integrated into every aspect of a venue from meeting space and furniture, to technology, to equipment and the venue’s use of resources. Venues that are able to show that they are ethical and sustainable will be more desirable to attendees as well as planners as this area grows in importance.

COVID-19 Perspective

How the industry balances the short term need to offer attendees reassurance of contamination free products (by using more single use plastics and wrappers) with the longer term ambitions to reduce the use of plastics will be interesting to monitor over the coming months, as on some levels the two objectives are not complementary.

Alan Corlett, group Commercial Revenue Director for De Vere Company in the UK comments “There are new assurances for venue selection, hygiene, safety, social distancing measures, technology, catering operational standards that are being seen as important as sustainability in planner’s proposal requests. This suggests more elements are important today in the interim first recovery phase for meetings.”

Mark Ralph, Food & Beverage Manager at Warwick Conferences in the UK adds “I feel it is important that although we will use more disposables and individually wrapped products, the packaging should be sustainable, with the goal to return to plastic-free and limited disposables as soon as possible”. Mariela McIlwraith adds to this “from a sustainability perspective, venues can mitigate the impact of disposables by having compostable service ware.”

“COVID-19 is the most urgent threat facing humanity today, but we cannot forget that climate change is the biggest threat facing humanity over the long term.

Soon, economies will restart. This is a chance for nations to recover better, to include the most vulnerable in those plans, and a chance to shape the 21st century economy in ways that are clean, green, healthy, just, safe and more resilient.”

— Patricia Espinosa, UN Climate Change Executive Secretary
The expectations, preferences and behaviours of meeting guests and planners are evolving rapidly. Venues are left to grapple with new and emerging technology, needs and motivations of incoming generations and attendees that are increasingly interested in transparency and ethical conduct, all while facing tightening budgets.

Some major themes from previous editions of Meeting Room of the Future reports are continuing in 2020, such as increasing importance of infrastructure, flexible spaces, and lounge furniture. While at the same time some new themes emerge such as, preference for human-nature connection, taking social responsibility and sustainability seriously and new technology considerations like cybersecurity and virtual reality.

Although these surveys were conducted during the early stages of the COVID-19 pandemic and the results do not reflect the changes that the meetings and events industry will encounter in the immediate future, many of the trends and changes predicted will hold true to some degree as much of these trends (especially preferences, sustainability and human-nature connection) are reflections of greater consumer trends and issues that will matter even in the wake of a pandemic.

**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](http://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.