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# Industry Analysis: What should we expect for 2014?

By Roberta Morehouse, CMP, Meetings Manager, American Dental Education Association

> Most noticeably in 2009 and 2010, the future of the meetings and conventions industry has been uncertain. From a reduction to the number and length of meetings booked per year, short leadtime for bookings, constrained budgets, increased focus on approvals, and the introduction of meetings policies, one is left to wonder what is in store for 2014 and beyond. Based on new oversight and regulation of government conference spending with the passing of the Digital Accountability and Transparency Act (DATA) of 2013 to improve transparency in government spending, along with the elimination of nearly 50 conferences in 2013, and the elimination of the Conference Lodging Allowance, which allowed federal travelers to spend 25

percent above per-diem rates for conferences, it would appear to government planners and their supplier partners that the future is bleak.

However, according to industry experts and business travelers, exclusive of government meetings, travel spend may be on the rise and we should begin to see signs of stability in the meetings and convention industry through 2014. The Global Business Travel Association (GBTA) expects that this year alone, business travel spending is expected to increase by 8.2 percent. In the past two years, the growth of meetings within the U.S. and internationally (in most areas) includes only cautionary budget and activity increases due in part to uncertainty. We have also noticed an increase in the role



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# Board Board



Karen P. Miller, CEM

# Happy 2014!

I am proud and excited to lead our terrific chapter this year, and I thank you for allowing me this opportunity. Although some of you may already know me, here are some quick fun facts:

I've been with the National School Boards Association for almost 16 years, starting as the executive assistant to the Executive Director, "stalking" my boss for a job in the Meetings Department (more about that at a later time), and eventually becoming Director of Exhibits.

I am happily married with two offspring, who I often refer to as "The Beasts." They are nine and three and the age gap has afforded me some great free labor.

1'm a wine lover. Some may say I'm a wino, but I like to think my tastes have evolved over the years from the Boone's Farm days!

I don't make New Years' resolutions, primarily because I know I will break them, but also because I believe it's better to take a step back and recalibrate (if necessary) many times throughout the year. However,

I do like thinking about goals... whether it's getting out of bed tomorrow morning to eek out a paltry 20-minute workout or the always-popular "where do I want to be in five years?" I may not have the answer to either question for you today, but I will tell you my goal as Chair this year: engagement.

Over the past 12 years of being involved with IAEE, and specifically the DC Chapter, I've often been inspired by the level of commitment from our fellow members. We have our day jobs (which often take us into the night) and our personal lives, and yet, so many find ways...both large and small... to show their commitment and engagement in our industry. From volunteering at the food bank or helping out at a Chapter luncheon to more formal activities such as serving on a committee or running for a position on the Board, there is a plethora of ways to get engaged.

When IAEE changed the membership structure to being organization-based, it opened up opportunities for members of your company or association to take advantage of the terrific resources IAEE offers. Do you know who's a member from your organization? For that matter...do THEY know they are a member? Are they aware of the ways they can enhance their skill set through insightful articles, commenting on a MemberLink discussion, or volunteering for the Mentor Match program? IAEE and the DC Chapter are not just about happy hours and receptions (although these are a nice perk!), there are countless learning opportunities, ways to give back to the community, and networking to share best practices and ideas.

Every year the Chapter offers scholarships for CEM classes and to attend Expo! Expo! This year I'm looking forward to seeing applicants who have really been engaged with our chapter and fellow members. Joining one of our committees is an easy way to get your feet wet. I will be encouraging my fellow board members to more fully engage their committee members, so everyone feels involved. Contact Vice-Chair, Andy Ortale, for more information or just complete the volunteer form on our chapter website.

Chapter upcoming activities are noted on our website http://www.iaeedc-chapter.com/page.cfm/ID=1

Chapter luncheons are typically held the second Friday of every month EXCEPT in June, July, August and December.

## Typical agenda:

Registration and Networking Reception: 11:45 a.m. – 12:30 p.m. Luncheon and Education Program: 12:30 p.m. – 2:00 p.m.

#### **IAEE Luncheons:**

When: January 10, 2014 Where: Clyde's of Gallery

Place

*Topic*: Roundtable Discussions *Sponsored by:* Ungerboeck Software International



When: February 14, 2014 Where: Westin Hotel Alexandria, Alexandria,

Virginia

*Topic:* 7 tips for Exhibit & Sponsorship Sales

Presenter: Sam Lippman

Future Luncheons: March 14, 2014 April 11, 2014 May 9, 2014

Locations and Topics: TBD





# Industry Analysis: What should we expect for 2014?

Continued from page 1

of formalized and rigorous meetings policies relative to procurement and compliance.

Moreover, meeting professionals surveyed by American Express for the 2014 Global Meetings and Events forecast are optimistic that large declines in activity are a sign of the past. The number of attendees overall is expected to increase minimally in most regions except Europe and Asia. However, the consensus among survey respondents indicates that decisions regarding attendance numbers are driven by internal reasons. Additionally meeting length is still moving downward in

most parts of the world with no significant changes over 2013. Specifically, 93% of North American respondents expect shifts of no more than 5% up or downward since meeting programs have already been reduced to the maximum extent possible.

Meeting budgets and planning are another area of equal concern to planners and suppliers. Similar to the length of meetings and conventions, most companies, according to respondents have already made significant cuts to program budgets and are planning minimal if any adjustments for 2014. In North America, with

the exception of government meetings, budgets are expected to hold steady. Planning lead times for sourcing meetings continues to get shorter (if that's possible); however, as with other trends, predictions range from a decline of 1.6% (North America) to 4.0% (Asia). Regionally, we can expect that more meetings will be booked locally rather than abroad in order to comply with internal policies, reduce travel costs and save time as evidenced by drastic changes in government conference spending. Associations, in particular, want to present a cost-conscious image

in response to economic conditions and member feedback.

The use of technology to enhance the meeting experience has moved from a novelty to mainstream trend for most organizations. Part of the demand for conference specific technologies is a direct result of the public's comfort and reliance on the use of mobile apps for personal use. With large events particularly, conference apps are viewed as a communications tool which provides the ability to instantaneously deliver time sensitive information and updates and solicit

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# 2013 Board of Directors

#### Chair

Karen P. Miller, CEM National School Boards Assocation kmiller@nsba.org

#### **Vice Chair**

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Dede Walsh, CMP, CTS Projection Presentation Technology dwalsh@projection.com

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Debbie Dyson, CEM National Training and Simulation Association ddyson@ndia.org

## Education Programs – Co Chairs

Paula Herz, CEM Shepard Exposition Services pherz@shepardes.com

Charles Robinson, FASAE Tradeshow Logic crobinson@tradeshowlogic.

# Sponsorship/Advertising

Bill McGlade International Sign Association Bill.McGlade@signs.org

#### Marketing

Donna Johnson, CEM, CMP, CTS Courtesy Associates djohnson@courtesyassoc.com

## **Special Events**

B. Murphy Fern Exposition & Event Services bmurphy@fernexpo.com

# **Communities & Outreach**

Mary Higham, CEM
ASIS International
Mary.Higham@asisonline.com

Do you have a topic that you would like covered at a lunch? Contact Paula Herz, pherz@shepard.com or Charlie Robinson, crobinson@tradeshowlogic.com.

Interested in sponsoring an event? Contact Bill McGlade to learn more at Bill.McGlade@signs.org.

If you have any questions or comments about the articles in this newsletter, please contact Donna Johnson at 202.367.1271 or djohnson@ courtesyassociates.com.

If you would like an extra copy of any issue of Show Buzz, please send an e-mail to Donna Johnson at djohnson@ courtesyassociates.com. com with subject line Copy of Show Buzz.

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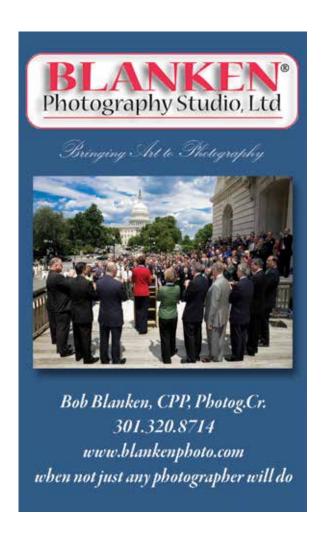
feedback about the attendee experience as it happens. With the technology becoming mainstream, organizations are focusing more on customization for their meeting apps—an area of great opportunity for technology vendors. Social media and meeting-specific-apps are no doubt "game changers" that have and will continue to change the face of meetings and conventions as we know it. In a 2013 survey conducted by TNS Global research, the number of virtual meetings has more than doubled in the past 5-10 years as a way to trim costs; however, it is not

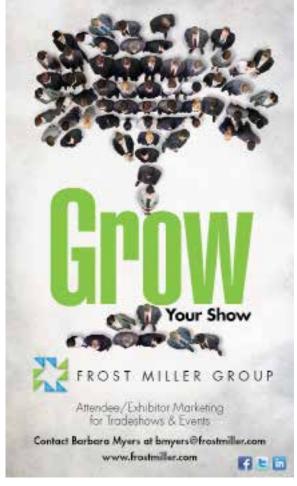
expected that this method will replace face-to-face meetings in the short term as 81% of respondents feel that face-to-face meetings are better for building long-term trust necessary for securing relationships.

Overall, there is a greater sense of stability returning to most aspects of the industry in North America, while abroad we expect to see slight declines in overall meeting spending. Further, meeting planners expected to continue to turn to more local and regional meetings as budgets, compliance and the need for greater meeting

efficiency is likely to increase. According to Issa Jouaneh, Vice President and General Manager, American Express Meetings & Events, "Heading into 2014, meetings and events will likely continue to remain critical drivers for organizations to align on strategic business objectives and effectively communicate with employees, customers and partners worldwide." Further, meeting organizers and technology providers must continue to look for ways to utilize social media tools and technology to create higher quality and more engaging programs that better meet

the needs of attendees. The future will be truly exciting for the industry as we redefine the meetings investment and experience management through the incorporation of digital meetings solutions," continued Jouaneh.





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Photos of the Washington, D.C. chapter luncheons and other events Photos: Bob Blanken IAEE DC December Luncheon



Ronnie Schaer



Joe Felpenn and Ronnie Schaer



Debbie Syson and Patti Steele



Mark Szymezak, Dot Hewitt



Amy Fisher and Diane Jidoni

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Jason McGraw and Andrew Ortale







Richard Melliand



B. Murphy

# A New Regulation Shines Bright

By Paul Bascomb, Program Manager, American Academy of Otolaryngology, HNSF



When it comes to our industry we are bound by many rules and regulations that need to be followed. If your association is represented by the medical sector then the newest law is directed to you and Exhibit Managers worldwide need to prepare their exhibiting companies accordingly.

Earlier this year the Physician Payments Sunshine Act (The Sunshine Act) was passed and to summarize it states that manufacturers of drugs, medical devices and biologicals need to report payments and items of value given to physicians.1 This directly affects medical associations that produce events where meals and giveaways are readily made available to attendees as the majority of our attendees are medical professionals. Our annual event, AAO-HNSF Annual Meeting & OTO EXPO<sup>SM</sup>, is sponsored by the American Academy of Otolaryngology-Head and Neck Surgery Foundation, and we have taken steps to ensure that our exhibiting companies

fall in line with this new regulation. While we cannot force these companies to adhere to these regulations, we can make them aware and set it as a regulation of our own in order to exhibit at our annual event.

Exhibiting companies in our industry may feel overwhelmed by the number of regulations in place that need to be followed, but as an association we have to do our part to see to it that everyone is on the same page. We have companies that must adhere to the PhRMA Codes and AdvaMed Codes so this should not be any different. The best thing that you can do is to include The Sunshine Act in your own set of Rules and Regulations. This is normally a section connected to the exhibitor application or included in the exhibitor prospectus. We have ours linked to our exhibitor application and we have our exhibitors sign the bottom of the page to note that they have read and understand all of the regulations. For us, it's only one more step to take, but it's worth it.

We don't want any of our exhibiting companies to be assessed penalties for non-compliance. Here's what could happen:<sup>2</sup>

 A civil money penalty of not less than \$1,000, but not more than \$10,000, for each payment or other transfer

- of value or ownership or investment interest not reported. The total amount of civil money penalties will not exceed \$150,000.
- Knowingly failing to submit payment information will result in a civil money penalty of not less than \$10,000, but not more than \$100,000, for each payment. The penalty will not exceed \$1,000,000.
- Combined, penalties may not exceed \$1,150,000.

I don't expect officials at events policing this rule, but why risk it. Inform your exhibiting companies because I'm confident that they would prefer to invest revenue in promoting their products and services rather than paying fees.

There is a lot of information that needs to be reviewed and sorted through and it should be our job as industry professionals to help in any way that we can. In a publication by Carter Ledyard & Milburn LLP3 it mentions what types of payments and transfers of value must be reported. Items include consulting fees, gifts, food and beverage, entertainment, education, grants and travel and lodging. When it comes to food and beverages it's not required to track or report buffet meals, snacks, or coffee provided to everyone

at a large-scale event. It also discusses who is considered a "Covered Recipient" and it explains this includes physicians and teaching hospitals. All payments and items of value over \$10 must be reported, however, this definition does not include residents or nurse practitioners. Other exclusions mentioned in this publication include:

- Existing personal relationships (a husband would not have to report personal gifts given to his wife, given that the wife is a physician)
- Educational materials that directly benefit patients
- · Discounts and rebates
- In-kind items for the provision of charity care
- Contractual warranties

This comes down to the level of customer service we provide to our clients, the exhibitors. Face-to-face events are created to enhance networking and increase exposure for companies looking to educate the public on what products and services are available to them. With medical events, this education is directly linked to physicians, surgeons, nurses and other hospital personnel in order to provide better overall patient care. We should do all that we can to inform our clients on all of the newest rules and regulations. So do your research and spread the word about The Sunshine Act to all parties involved. It's simply the right thing to do.

<sup>1</sup> Toolkit for Physician Financial Transparency Reports (Sunshine Act), AMA-American Medical Association. https://www.ama-assn.org/ama/pub/ advocacy/topics/sunshine-act-and-physician-financial-transparency-reports. page

<sup>2</sup> Physician Payment Sunshine Act Final Rule: Quick Reference Guide, Policy and Medicine. http://www. policymed.com/2013/02/physicianpayment-sunshine-act-final-rule-quickreference-guide.html

<sup>3</sup> The Physician Payment Sunshine Act: A Dawning of New Reporting Requirements for Drug and Medical Device Manufacturers, Carter Ledyard & Milburn LLP. http://www.clm.com/ publication.cfm?ID=431



Thank you to all our IAEE DC Chapter Members who volunteered at the Capitol Area Food Bank!







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# Congratulations

# CEM's

**Access Intelligence LLC** 

Lindsey Fuller Jess Tyler

**Aircraft Owners & Pilots Association** 

Jenni Rosenthal

**American Anthropological** Association

Carla Fernandez

**American College of** Radiology

Pamela Plater

**American Council on** the Teaching of Foreign Languages

Alison Bayley

**American Orthotic & Prosthetic Association** (AOPA)

Kelly O'Neill

**American Society of** 10: Human Genetics

Carrie Morin

**American Wind Energy Association** 

Brandon Kopp

**Association of Corporate Travel Executives** 

Lisa Williamson

**Consumer Electronics Association/CES** 

Kristen Nafziger

**Fern Exposition & Event** Services

B. Murphy

**Freeman** 

Gary Zgorski

Global Experience Specialists (GES)

Stefanie Moss

**Goodwill Industries** International Inc

Naomi Iheme

**Hargrove Inc** 

Kevin Murphy

**International Association** of Amusement Parks & Attractions

Stacey Mills

**International Sign Association** 

Iain Mackenzie Bill McGlade

| Spargo & Associates Inc

Eileen McGill

**Las Vegas Convention & Visitors Authority** 

Devin Lewis

**National Association of Broadcasters** 

Ashley Lerner

**National Automobile Dealers Association** 

Terri K. Carter

**National Defense Industrial Association** 

Angie De Kleine

**Optical Society of A**merica

Kathleen O'Driscoll

**Produce Marketing Association** 

Belinda Keota

**Specialty Graphic Imaging Association** 

Jean Lockwood Lambert Alexandra Olisko Katie Wolfe

The American **Association of Immunologists Inc** 

Mr. Clayton Moore

#### **US Department of** Commerce

Hector Maldonado Graylin Presbury Deborah Semb Mr. Michael Thompson

Mr. Mark Wells

**US Pharmacopeia** 

Tanya Barrett

**Visit Norfolk** 

Faye Pastor

Water Environment **Federation** 

Stefanie Walter

# CMP's

LLB Enterprises, LLC

Lori Burke

**National Association of Chain Drug Stores** 

Sally Cranney

# Shooters

## **PROMOTIONS**

John F. Boyle is now Assistant Vice President, Professional Development & Education at NAIFA.

Matthew W. Chaney is now National Account Executive at Hargrove, Inc.

Sally Cranney is now Director of Meetings & Special Events at National Association of Chain Drug Stores.

Kathy Hashko is now Manager, Sales & Financial Administration at Show Management Solutions, Inc.

Brad Lewis is now **Exhibition Manager at Show** Management Solutions, Inc.

Vincent T. Polito is now Principal at VP International.

Frederick Sanchez is now Citywide Sales Executive at Marriott & Renaissance Hotels & Resorts.

## **MOVERS & SHAKERS**

Michelle Beckner is now Director of Meeting Services at American Industrial Hygiene Association.

Karen Bogaczyk is now Project Manager at a2z, Inc.

Lori Burke is now President & CEO at LLB Enterprises, LLC.

Christine Faiman is now Global Account Executive at Marriott International.

Wanda D. Jackson-Lewis

is now Regional Manager, Meeting & Convention Sales, Tourisme Montreal.

Charles A. McGrath is now Executive Director at Interlocking Concrete Pavement Institute.

Kim Rodrique is now Global Account Director at Sonesta Hotel Collection.

# Happy 2014!

Continued from page 2

#### Directors of Programs, Paula Herz and Charlie Robinson

This committee works to determine the topics, speakers, and locations for our educational luncheons. They also help coordinate the last minute details at the location.

# Director of Sponsorships, Bill McGlade

This committee work on finding sponsors for our luncheons, our fun events (karaoke, receptions, bowling, etc.), and our chapter newsletter, ShowBuzz.

## Director of Marketing, Donna Johnson

This committee creates the content for the e-mail blast on the luncheons and other fun events, creates the chapter newsletter, and is always looking for volunteers to write articles for the chapter newsletter.

# Director of Communities & Outreach, Mary Higham

This committee, meets and greets attendees at chapter events, talks up first timers to get them engaged in the industry and the chapter, manages our chapter content on the chapter website, handles the 50/50 drawing, social media network communication, and recognizes new members, anniversaries, etc.

# Director of Special Events, B. Murphy

This committee plans our special events, including location, food and beverage, etc. They usually plan the fun chapter events (karaoke, receptions, bowling, etc.), work with our chapter charities and community service projects, and plan the chapter reception at Expo! Expo! each year.

I understand not everyone can or wants to give the commitment to a committee, so engage me! Tell me what would make you get more involved with IAEE. What are you looking for? What ideas do you have for member engagement? What more can we do or what have we missed out on doing? E-mail me your thoughts at kmiller@nsba.org.

Finally, last but certainly not least, I'd like to extend my deepest heartfelt thanks to my fellow board members, many of whom are returning to board duty: Debbie Langelier, Andy Ortale, Dede Walsh, Bill McGlade, B. Murphy, Mary Higham, Ronnie Schaer, and Donna Johnson. I'd also like to extend a special welcome (and welcome back) to Charlie Robinson and Paula Herz.

I look forward to seeing many of you throughout the year and let's make 2014 a great year for everyone!

# Connect with the D.C. Chapter

- Facebook: www.facebook.com/ IAEEDC
- LinkedIn Group:
   Join International
   Association of
   Exhibitions and Events
   (IAEE) Washington,
   D.C. Chapter"
- Twitter: www.twitter. com/IAEEDC
- Chapter Website: www.iaeedc-chapter.
- Instragram: Follow IAEEDC
- Pinterest: www.Pinterest.com/ IAEEDC

Interested in speaking at an upcoming chapter luncheon please contact our 2014 Program Co-Chairs:

Paula Herz, email: pherz@shepardes.com

Charlie Robinson, email: crobinson@tradeshowlogic.com

Insterested in writing an article for an upcoming issue of Showbuzz, please contact our 2014 Marketing Chair:

Donna Johnson, email: djohnson@courtesyassociates.com



IAEE Washington, D.C. Chapter c/o Donna Johnson 2025 M Street, NW, Suite 800 Washington, DC 20036



