

2016 MATSO Program | 23-24 May 2016

McCormick Place, S-505; Chicago, Illinois

Host Event: NRA Show 2016

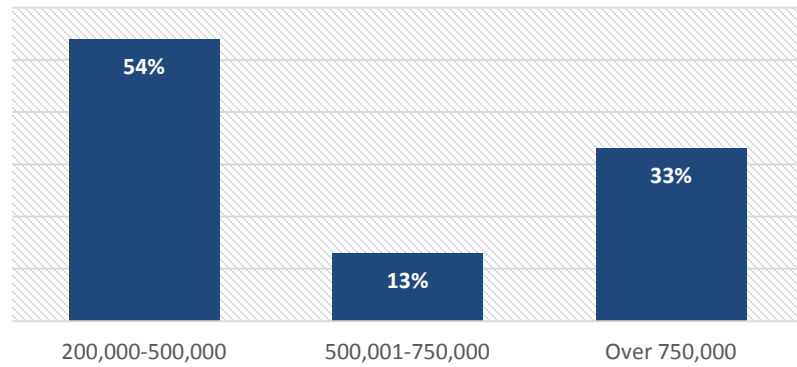
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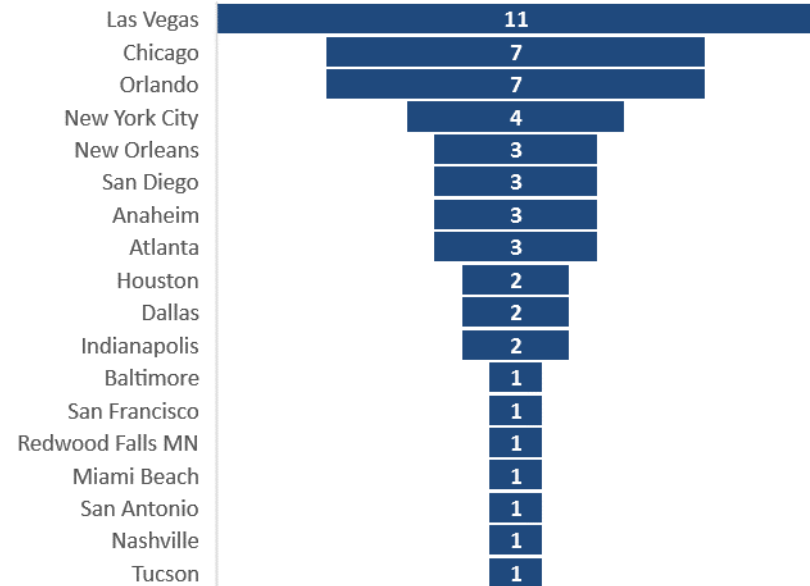
MEETING REPORT

PARTICIPANTS	
<i>Host Event and Sponsor Representatives</i>	<i>Presenters</i>
<p>Choose Chicago: Marc Anderson, CSO/Senior VP, Sales & Services; Lori Adlesick, VP, Industry Relations & Special Events</p> <p>Kuehne + Nagel, Inc.: Jackie Russo, VP</p> <p>McCormick Place: David Causton, General Manager; Moira O’Brien, Director of Sales</p> <p>NRA: Mary Pat Heftman, Executive VP, Convention & Strategic Alliances; Jennifer Morris, VP of Meetings & Tradeshows</p> <p>Savor Chicago: Alison Parks, Director of Catering Sales and Marketing</p>	<p>Emcee’s: Kelly Kilga, CEM; Camille Stern; Angela Harar, CEM (remote)</p> <p>Future Trends & Challenges Workshop: Francis Friedman, President, Time & Place Strategies Inc.</p> <p>City Working Group Reports: Chicago – John Catalano; Las Vegas – Justine McVaney; Orlando – Kelly Kilga, CEM; New York – Chris Nemchek; New Orleans – Sacha Carey, CEM</p> <p>CEIR: Cathy Breden, CAE, CMP, EVP & COO, IAEE</p> <p>Advocacy: David DuBois, CMP, CAE, FASAE, CTA, President & CEO, IAEE</p>
<i>Attendees</i>	
<p>Adam Andersen, Managing Director, Penton</p> <p>Raymond Bianchi, Senior Director Expositions & Events, IDEAg Group LLC</p> <p>Thomas Carbott, SVP of Exhibitions, Material Handling Industry</p> <p>Sacha Carey, CEM, Director Exhibition Sales & Operations, water Environment Federation</p> <p>John Catalano, Group Show Manager, Society of Manufacturing Engineers (SME)</p> <p>Jessica Curtis, CMP, Senior Director, Meetings & Show Services, National Association of Broadcasters (NAB)</p> <p>Christine Flanagan, CEM, VP of Operations, Reed Exhibitions</p> <p>Nancy Gavin, Operations Director, National Safety Council</p> <p>Lenay Gore, Senior Director – Meetings & Tradeshows, American Public Transportation Association</p> <p>Anne Halal, CEM, VP of Expositions Education & Member Services, North American Meat Institute</p> <p>Tiffany Hale, Event Manager – Expo, National FFA Organization</p> <p>Angela Harar, CEM, Senior Director of Tradeshows, The Vision Council</p> <p>Robert Hoffmann, Event Technology Manager, Association of Equipment Manufacturers (AEM)</p> <p>Kelly Kilga, CEM, Director of Operations, Graphic Arts Show Company Inc.</p>	<p>Iain Mackenzie, CEM, CMP, VP, Meetings & Events, International Sign Association</p> <p>Chris McCabe, EVP, Emerald Expositions</p> <p>Justine McVaney, SVP of Event Planning & Operations, National Association of Broadcasters (NAB)</p> <p>Kevin Murphy, CEM, Senior Manager, CES Operations, Consumer Technology Association/CES</p> <p>Chris Nemchek, SVP, Business Development, Specialty Food Association Inc.</p> <p>Merideth Newman, CEM, Exhibitor Services Manager, The Association for Packaging and Processing Technologies (PMMI)</p> <p>Michelle Sanford, CEM, Director, Event Operations, Association of Equipment Manufacturers (AEM)</p> <p>Camille Stern, SVP of Strategic Account Management, SPARGO Inc.</p> <p>Sheryl Strain, Trade Show Manager, National Safety Council</p> <p>Ryan Strowger, CEM, SVP Exhibitors, Conferences & Sales, International Association of Amusement Parks & Attractions (IAAPA)</p> <p>Megan Tanel, CEM, SVP of Exhibitions, Association of Equipment Manufacturers (AEM)</p> <p>Patricia Whitaker, Exhibits Manager, American Academy of Orthopaedic Surgeons</p>

Show Size of Attendees - NSF



MATSO Attendees Produce Shows in These Cities



Day 1 – Monday, 23 May

FUTURE TRENDS – Francis Friedman – Presentation available on IAEE MemberLink – MATSO Page

The report was based on findings from IAEE’s 2015 Future Trends Impacting the Exhibitions and Events Industry.

Future Trends Look Ahead

Major Factors – Industry Growth and Economic Outlook

- 2015-17 industry growth estimated at 2.5-3.0% per year
- Economic Factors to impact the industry
 - FED raised interest rates in 2015 and beyond; costs go up/investments down.
 - Stock market due for a “correction in the next two years
 - Global economy still weak; China slowing, Europe/Japan still in recovery and Euro/Japan banks show negative interest rates
 - Oil, commodity prices down; slow recovery over time
 - Mid-East turmoil/war; visa restrictions; terrorist attacks; US border issues
 - 2016 U.S. Election; post-election policies
- Shows tied to GDP and financial health of their sector

Onsite Data Capture

- Emerging trend that is growing in importance
- Purpose: Information – attendee behavior – show physical performance – exhibitor results – make better decisions
- Analytical gap – skill sets to analyze collected data, build understanding from data and build plans based upon data

- Technology Tools – smartphone apps and phone technical capabilities (including unique smartphone ID although phone has to be on and allow contact)
- NFC (Near Field Communications – short range)
 - RFID (Radio Frequency Identification – badges)
 - iBeacon (blue tooth communications – 75-foot range)
 - Sensors under aisle carpets to measure aisle traffic
 - Registration system card swipe data and aisle traffic “heat maps”

Exhibition Industry Future in Rapidly Expanding Digital World

- Digital marketing budgets will continue to expand
- Social Media marketing, video/virtual marketing, etc. will expand
- Tradeshow marketing – increased competition for marketing dollars and staff time and face-to-face options
- Relevancy and productivity – key criteria for tradeshow dollars
- Research and quality data
 - Important tools for individual shows and the overall industry
 - Document tradeshow value, productivity and ROI
 - Meet changing marketer needs and criteria
 - Prove the industry’s role in integrated business-to-business marketing channel

Mobile Computing and Related Topics

- World is going mobile and smarter (80% penetration)
- Younger audiences and “C” generation
- Shows – mobile enabled – more sophisticated
- Show management issues
 - On-site mobile downloads; policy and revenue
 - On-site technologies for downloads and costs
 - Permissions and disclosures
- Facility Data/WiFi Infrastructure/Costs
 - Limited – expensive services
 - Services – robust and cost effective; but who pays?
 - Large vs. small facilities/large vs. small events
 - Hotels and adjacent facilities
 - 5G ahead 4-5 years
- New Technology Rollout
 - Wearables – watches, bands, headsets
 - Smart phone upgrades – 2016 started next series
 - Virtual reality – engagement/products/experiences
 - Headsets, surround sound, immersion experiences
 - Marketing

- Virtual presence, augmented reality
- Part of a larger, connected world – and data collections systems

2016 – the Dawn of IMMERSIVE MARKETING

- Virtual Reality – immersive viewing in 360° (drones, parallel online games)
- Virtual Presence
- Internet of Things (IoT)
 - Small microphones embedded in everything
 - Individual Internet address
 - Reporting through and controlled over the Internet
 - Major data generation source
 - Device control
 - Reporting status and function data
 - Marketing/customer/behavior and use data
- Social Media Marketing
 - Growing sophistication and penetration – must keep up
 - Rapidly changing marketing tools – exhibitors, attendees
 - Omni-channel marketing
 - Show management not using all available tools/techniques
 - Show team talent and learning curve
 - New skills needed (e.g., SEO, content strategy/development)
 - Increase use of social media (e.g., retailer video chat)
 - Speed – design, implementation
 - Analysis
 - 24/7 show (BizBash, Blogher)

Demographic Changes/Generational Considerations

- Millennials (20-33 years of age) 80+ million, larger than Gen X, Gen Z following
- New exhibitors, new employees
- Digitally raised, lifestyle
- Don't trust government, society
- New social norms, expectations
- Tied to their social reference group(s)
- In a hurry, short attention span, want to “hack” through stuff
- Focused on “**the experience**” (e.g., Airbnb)
- Show managers marketing to changing generations
 - Sales appeals, vocabulary, graphics and “stories”
 - Media usage
 - Digital usage

- Social reference structure and its importance
- Pre-show promotion – segmented targeting, copy, appeals
- On-site executional segmentation (e.g., “color” run)
- Show managers hiring the changing generations
 - Different mentoring and career development for employees (Gen X, Millennials - now, Gen Z – soon)
 - Cross generational issues – reverse mentoring
 - Ongoing research, awareness and change

Trade Show Design and Programming

- Design and programming will be a unique skill set – job title
- Time is a key value consideration – all audiences
- Value/ROI – attendee and exhibitor – increasing concern
- Show management will need:
 - Recognize that change is driving the business
 - More ongoing research and needs assessments
- Willingness to experiment and risk

Engagement

- Important concept – definition expected to change
- How defined? By whom?
- Require more sophisticated research methods, understandings
- Important executional skill sets (who is engaged by what?)
- Will have to constantly change show-to-show
 - As demographics/psychographics change
 - As digital increases – use and experiences
 - Attention span challenges
 - Monetization – value delivery

Experiential Tradeshow

- It’s a show
- It’s an experience
- Engagement
- Apps
- Social media and marketing
- Gamification
- Show design and programming
- High value delivery
- Don’t bore me!

In summary, three-year look ahead:

- There will be economic challenges and budget issues

- Technology will grow in use and importance
- Data will be an important management tool for organizers in attendee development, experience delivery and attendee/exhibitor ROI
- Future Challenge – DATA - analysis, interpretation, plan building and execution
- Need to continually evolve “the show” experience

IDENTIFY CHALLENGES FOR MATSO TO CHAMPION AND MAKE CHANGE – Facilitated by Francis Friedman

Six challenge areas were identified in advance of the meeting through a pre-event survey and data from the needs assessment conducted in 2014. **The main challenge areas included: Costs; Business of the Event; Exhibitor Issues; Attendee Engagement; Technology and Marketing.** Before breaking into groups, the facilitator engaged the attendees in discussion and two other areas were brought forward. One was the *overall tradeshow model* and the other *data strategy*. It was noted that the two new categories could easily fit under already identified challenge areas and that data collection and usage will help to address many of the general issues/challenges that were identified in the pre-event survey. The participants were then asked to write down and post notes to the flipcharts indicating their biggest issues in each of the six challenge categories. The facilitator did a general review of the notes in each of the challenge categories and the group voted on which two challenge categories were the most important for the group today. **Attendee Engagement** and **Business of the Event** were selected. The next step was for breakout groups to further define issues in the two main challenges categories. There were five tables; three of the groups worked on The Business of the Event and two groups worked on Attendee Engagement. The group reports are recapped below.

Business of the Event

Group 1

Maximizing Revenue Opportunities/Cost Containment

- attendees
- exhibitors
 - Exclusive services
 - Hotel costs
 - General service contractor

Group 2

Threats

- Corporate Events – public and private
- Non-trade Shows – road shows, regional shows, user conferences
- Niche Shows/Innovative events
- Digital
- Loss of Bellwether exhibitors

Opportunities

- Non-endemic sponsors/new sponsorship opportunities
- Launches & new markets
- Sustained community/online market place
- Outside of the box staff

Attendee Engagement

Group 1

Generational Concerns/Sustainability

- Generation gap ⇒ current attendees aging out/determine methods to attract new
- Instant gratification
- New model must evolve through walking aisles

Data Analysis

- Collecting and analyzing data to better understand how your attendees want to be engaged
- What motivates attendees?

Solution

Understand the data first

Group 2

Understanding Your Attendees

- Personas
- Customer-centric model
- Create an experience
- Help facilitate engagement from attendees to exhibitors

Create An Experience

- Show Engagement

<p>Group 3</p> <p>Traditional Tradeshow Model</p> <ul style="list-style-type: none"> ▪ Hire an outside voice to research better model to contain costs for show managers and exhibitors ▪ Provide outline of ideas and invite partners/vendors to join conversation ▪ Recreate the show model for cost containment and evolving attendee base <p>Metrics of Success</p> <ul style="list-style-type: none"> ▪ Review and recommend metrics/criteria that should be used to determine success <p>Up-skill Staff</p> <ul style="list-style-type: none"> ▪ Provide/use future of industry to define evolving job needs with descriptions to assist with the hiring/training of staff 	<ul style="list-style-type: none"> ▪ Unique Events ▪ Partner with facility for use of public space ▪ Technologies to help measure attendee patterns and preferences ▪ Community Engagement x365 ▪ Understand industry trends and capitalize on them ▪ International engagement may look different than domestic <p>Exhibitor: Attendee Engagement</p> <ul style="list-style-type: none"> ▪ Sponsor engagement, is it logos/branding or activation? ▪ Is “matchmaking” still relevant? ▪ Technology selection – what is usable? What will last? ▪ Exhibitor ROI
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In Summary

After reviewing the ideas that the breakout groups reported on, the group as a whole identified that there were several concrete and measurable ideas presented. It was determined that being broad in thinking would be important as MATSO further defines a plan of action. Some items highlighted in the recap included:

- Personas - develop broad buckets through data collection; write copy for them as some will fit into an archetype
- Data collection and its impact on everything – data manipulation and smart usage
- Cost containment (drayage)
- Exhibitor ROI – mapping ROI will grow in importance
- Challenge the current Tradeshow model

Staff, with feedback from the MATSO Council, will develop an action plan based on the challenges session and other outcomes from the meeting.



Day 2 – Tuesday, 24 May

<p>HOST CITY REPORT - Chicago</p> <p>Chicago is Breaking Records</p> <ul style="list-style-type: none"> ▪ 2015 – first time domestic visitation topped 50 million (a 4.6% increase over 2014) ▪ 2016 Q1 – Record growth in leisure hotel room demand; hotel performance saw 1.99 million rooms occupied surpassing the first quarter post-recession average of 1.75 million <p>The Future</p> <ul style="list-style-type: none"> ▪ 2018 – Downtown Chicago will have a 20% increase in inventory over a five-year period 	<p>Presenters</p> <p>Marc Anderson, Chief Sales Officer and SVP, Choose Chicago David Causton, Regional Vice President, McCormick Place – SMG</p>
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<ul style="list-style-type: none"> ▪ Developments – Navy Pier Centennial; Wrigley Field; Chicago Riverwalk and McCormick Square 	
CITY WORKING GROUP REPORTS – Full presentations available on IAEE MemberLink – MATSO Page	
<p>Chicago – John Catalano, Society of Manufacturing Engineers (SME)</p> <ul style="list-style-type: none"> ▪ Health of Meetings Business <ul style="list-style-type: none"> → Domestic Visitors topped 50 million → Total visitors exceeded 53 million → Business visitors grew 5.1% to 11.65 million → Compression is expected to lessen with added inventory by close of 2018 ▪ Choose Chicago Tourism Board – state funding & regaining staff on the horizon? ▪ Hotel Development/New Properties/Attractions under development through 2018 ▪ Airports/Air Lift/Transportation – Taxi and now Uber providing service to/from both airports ▪ Labor & McCormick Place – Some challenges and confusion with some aspects of labor at McCormick Place ▪ Security – Considerable discussions are underway to improve security in light of recent attacks at public venues 	<p>Las Vegas– Justine McVaney, National Association of Broadcasters</p> <ul style="list-style-type: none"> ▪ Annual Visitor Volume (2015) – 42.3 million breaks tourism record! ▪ Year-End Room Inventory (2015) – 149,213 ▪ Citywide Occupancy (2015) – 87.7% ▪ 2016 Visitor Volume Forecast – 42.5 million ▪ Southern Nevada Tourism Infrastructure Committee – Reviews various projects for development, prioritizes the list of approved projects and development funding models to present to the governor. The following entities have submitted projects for review: McCarran International Airport; various stadiums, arenas and event centers, convention center, pedestrian movement and roads, highways and mass transit.
<p>Orlando – Kelly Kilga, CEM, Graphic Arts Show Company, Inc.</p> <p>OCCC Campus Capital Improvement</p> <ul style="list-style-type: none"> ▪ \$187 million project includes – Destination lounge, N/S wayfinding, west building restroom renovations, I-drive pedestrian bridge, Vision Gardens and renovations to Hall E & F, West Building restrooms and the Valencia Ballroom <p>Proposed Campus Master Plan</p> <ul style="list-style-type: none"> ▪ 5 to 20-year Master Plan includes – Campus improvements to all the buildings and priority for the Campus Circulator, N/S Building connector, Multipurpose Hall, Activity Hub, and new Parking Garage 	<p>New York – Chris Nemchek, Specialty Food Association, Inc.</p> <ul style="list-style-type: none"> ▪ City Issues – Meetings business health is strong; CVB-NYC & Co support is moderate to high; new attractions present an ever-evolving cityscape; three international airport hubs; taxis/Uber offer extensive ground transportation in addition to wide-ranging subway and commuter rail; and security concerns, while there is extensive security, NYC is still a target ▪ Convention Center Issues – expansion/renovation plans from 1.2 million sq. ft. in late 2016 to 3.3 million sq. ft.; in-house vendors include a variety of food vendors, FedEx printing and shipping on-site; ease of doing business – timeliness of communications can be an issue, follow-up and diligence is required at times; and incentives – none offered <p>Housing – Eight new hotels coming on line early to mid-2016; expansions/renovations are in a constant state of renewal; rate/contract challenges – rates can be high to very high at times of year close to major city events; occupancy rates are moderately high but never completely</p>

<p>New Orleans – Sacha Carey, CEM, Water Environment Federation No longer RECOVERING. We are now CREATING.</p> <ul style="list-style-type: none"> ▪ 1,400+ restaurants ▪ 9.52 million visitors ▪ \$6.83 billion in visitor spending ▪ 129 festivals attended ▪ Recent major sporting events include Super Bowl, WrestleMania, Final 4 <p>New Construction</p> <ul style="list-style-type: none"> ▪ BioMedical District ▪ airport redevelopment 2018 ▪ infrastructure upgrades and improvements <p>The Next Big Thing – Convention Center District development will revitalize the area bringing new entertainment, dining, arts and cultural opportunities and increasing safety measures</p>	<p>booked out due to extensive room inventory; compression is very high in Manhattan and surrounding neighborhoods</p> <p>Closing Discussion on City Working Groups – to be used in development of the Action Plan</p> <ul style="list-style-type: none"> ▪ How to keep the info going year-round ▪ Identify who wants to participate in which city group ▪ Identify MATSO members who participate on client advisory boards and in which city (or assign a liaison when needed to get on a meeting agenda for a challenge faced by organizers in a specific city) ▪ Format the city working groups session at Expo! Expo! as breakouts or roundtables to better foster discussion (start with a brief update and break into groups for more discussion specific to each city) ▪ More opportunities to share versus present ▪ Develop online resources relevant to cities and include contact information ▪ Develop a post-show reporting process for MATSO members to share their experiences with the group ▪ One suggestion was to have city working group sessions spread throughout all the education days during Expo! Expo!
<p>MATSO COMMUNITY DISCUSSION – Angela Harar, CEM</p>	
<p>The goal of the MATSO community discussion was to get ideas on engaging the MATSO community year-round by determining the best platform(s) to regularly share relevant content and conduct private, group conversations to execute the groups fundamental principles.</p> <p>Part 1 – Explore how to best communicate</p> <ul style="list-style-type: none"> ▪ MemberLink – only a few attending the meeting use MemberLink although several are aware of it. ▪ MATSO Private LinkedIn Group – Six participants have used the LinkedIn private group to ask questions. NOTE: While both of these groups are private, many indicated they would not feel comfortable posting or responding to certain questions/topics online. <p>Part 2 – What types of content and interaction will be most useful for the group?</p> <ul style="list-style-type: none"> ▪ Continue holding two programs per year (Expo! Expo! and co-located with a MATSO show) ▪ Explore different types of events; corporate, consumer event, etc., instead of the traditional MATSO show ▪ Content suggestions <ul style="list-style-type: none"> → Data collection and how to use (justifying expense of aggregating/analyzing data) → ROI for exhibitors → Behavioral tracking 	

<ul style="list-style-type: none"> → Technology at events (know your show to determine best technology) → Cost containment and value add ▪ Draft a survey to acquire feedback from the larger MATSO community to determine what types of content and delivery methods resonate with them. Some suggestions from the room included: <ul style="list-style-type: none"> → webinars → white papers/case studies → research findings → city updates → face-to-face → combination live event and webinar follow-up → lots of networking opportunities at live events 	
MATSO IMPACT – CEIR – <i>Cathy Breden, CMP, CAE</i>	ADVOCACY – <i>David DuBois, CMP, CAE, FASAE, CTA</i>
<ul style="list-style-type: none"> ▪ Mission and Vision of CEIR ▪ 501©3 Organization ▪ Relationship with IAEE ▪ Provides unbiased industry research <ul style="list-style-type: none"> → Supports ongoing industry education → For board reporting → Budget justification for organizers and destinations → Exhibition performance to include benchmarking & performance metrics, attendee focused research, exhibitor focused research, technology trends and industry insights → Two “big” reports, Index (year over year performance metrics) and Census (when and where events are held) → Supports advocacy ▪ Under development <ul style="list-style-type: none"> → Event Performance Calculator → Economic Impact Calculator ▪ Supporting CEIR <ul style="list-style-type: none"> → Providing data to the CEIR Index → Attending Predict Conference and Golf Events → Providing individual and corporate contributions → Sponsoring specific research relevant to your industry sector 	<p>How does IAEE support the industry through advocacy?</p> <ul style="list-style-type: none"> ▪ IAEE Advocacy Task Force – to advocate and promote awareness of face-to-face exhibitions and events as the primary marketing medium for business development and growth. ▪ Exhibitions Mean Business ▪ U.S. Exhibitions Day – Proposed 2016 industry issues <ul style="list-style-type: none"> → Housing – Availability, Piracy & Scamming → Proposed Overtime Regulation → Visa Waiver → Airport Passenger Facility Charge → Crisis Response ▪ Global Exhibitions Day ▪ Chapter Engagement & Activation ▪ Coalitions – US Travel and Meetings Mean Business ▪ Advocacy Survey – Strategic Development

MATSO IDEA EXCHANGE

For this part of the program, attendees were asked to bring a tip or “hack” to share.

National Association of Broadcasters – Registration was flat so they came up with two ideas to implement to bring in more revenue from those already attending.

1. VIP Package for regular registrants – Special badges, lounge with Wi-Fi and beverages, concierge service, VIP seating at the general events, massage chairs and specialty areas on the show floor. Many registrants bought the VIP package but few used it but worked well to generate some extra revenue.

2. Stay and Play Package – To encourage attendees to stay through the end of the show and through the weekend after the show. This one didn’t work.

IDEAg Group LLC – Looking to improve traffic flow at event so built cultivation centers (like silos) around their shows so attendees could engage by demographic. Silos are determined through pre-reg. and a perfect opportunity for a sponsorship.

Association of Equipment Manufacturers and National Association of Broadcasters – Work with local transportation to enhance the attendee experience: free transportation via monorail with your badge and designated Uber, Lyft, Taxi’s during your event. Taxi companies are not as agreeable as Uber or Lyft.

Water Environment Federation – Wanted to provide more member value at their event. They opened housing a week early for members and changed the registration structure from free expo for both members and non-members to charging for non-members.

International Sign Association – Developed a sponsorship opportunity that provides full floor graphics with exhibitor map/listing.

The Vision Council – Print badges on-site – no mailing in advance.

There was additional conversation about why are we still using paper badges (mostly for exhibitor convenience) and the use of mobile apps. Several attendees commented that the mobile app usage for their event is low. It was noted with the influx of technology the mobile app experience will continue to improve.

Connect with your MATSO network between meetings

- [MemberLink](#) (IAEE’s online members-only forum)
- LinkedIn Group – [Apply here](#)
- [MATSO webpage](#)

Future MATSO Programs

- Expo! Expo! – Anaheim, CA; 6-8 December 2016
- ConExpo-CON/AGG – Las Vegas, NV; 7-11 March 2017

**Thank you to our sponsors
and host!**



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