2019 STATE OF THE CONFERENCE INDUSTRY REPORT
Delivering Educational Content: Current Challenges and Future Opportunities
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INTRODUCTION

For the fifth consecutive year, Omnipress has tracked the evolution of conference content and the role it plays at an association’s annual meeting. This year’s results indicate that while education provides significant value to members, association professionals continue to face challenges in how they deliver this content to meet the needs of an increasingly diverse and complex group of attendees.

The 2019 State of the Conference Industry Report reflects the responses collected through an online survey of 150 association professionals, many of whom are directly responsible for conference planning.

Opportunity is a key theme that is woven through this year’s report. From increasing cross-team collaboration, to how content is used to extend the conference experience, to preparing for new generations, associations should feel hopeful that, while challenges exist, there are substantial opportunities for associations to increase visibility, extend their value and reach new audiences.

We close this year’s report with some key questions to spark strategic conversations and generate new ideas. Our goal with this report is not only to shed light on common trends, but to also help associations leverage their greatest asset—educational content—to strengthen their connection with new and existing members.
ASSOCIATION MEMBERSHIP AND THE ANNUAL CONFERENCE

Growth of the annual conference continues to be a primary area of focus for associations, but it’s a bit of an uphill battle for meeting planners.

Since the release of the first State of the Conference Industry Report in 2015, increasing attendance has been the number one goal for meeting planners. However, most associations are still reporting only flat-to-modest member growth year-over-year. In fact, respondents from select industries (Environmental and Science) are reporting flat-to-modest decreases in membership.

Conference attendance growth trends typically mirror membership trends, making it even more important for conference and membership teams to work together to attract new audiences.

The annual conference provides a unique opportunity to demonstrate the association’s value to a prospective member before they make an annual commitment to the organization. In addition to featuring programming at the event for new attendees, conference and membership teams should consider synchronizing their marketing strategies, messaging and even pricing strategies to build a logical connection between the annual conference and membership.
How has your membership and conference attendance changed over the past year?

- Increased significantly: 21% Membership, 10% Attendance
- Increased modestly: 30% Membership, 29% Attendance
- Remained about the same: 40% Membership, 46% Attendance
- Decreased modestly: 17% Membership, 13% Attendance
- Decreased significantly: 1% Membership, 2% Attendance

What is your #1 goal for your annual conference in 2019?

- Increase attendance: 42% Membership, 13% Attendance
- Increase sponsorship or exhibitor revenue: 13% Attendance
- Expand the scope of the conference: 13% Attendance
- Attract new audience(s): 12% Attendance
- Increase attendee retention: 11% Attendance
- Decrease costs: 2% Attendance
- Other: 7% Attendance
DELIVERING EDUCATIONAL CONTENT TODAY

Attendees not only expect high-quality educational content at a conference, they expect it to be delivered in many different formats.

It probably comes as no surprise to associations that attendees strongly value the knowledge they gain by attending an annual conference. Organizations take this responsibility very seriously as they source and select session content. Equally important, however, is how they choose to deliver this content each year.

Not only are associations providing multiple types of content—from presentations to bios to worksheets—they are being asked to deliver it in more formats than ever before. On average, associations are providing 2.6 formats—up from 2.4 in 2018 and 2.1 in 2017. The most noted increase was in the number of respondents who are providing three and even four different content delivery methods for a single conference. The reason? Attendees indicate this is what they want.

Conference demographics are more diverse than ever, with four generations now living concurrently in the workplace. Additionally, there are more ways than ever for people to consume content, which is creating a diverse set of preferences that don’t always follow generational stereotypes.

While associations look for ways to provide device-agnostic content, budget does come into play—particularly with other internal stakeholders. Few meeting planners have the luxury—nor the bandwidth—to do it all, leading to some tough decisions.
What is the single greatest value your annual conference provides to your members?

Knowledge and education 60%
Networking with fellow attendees 35%
Notoriety and publicity 0%
Other 4%

Knowledge and education continues to be seen as the primary reason to attend a conference. But keep an eye on “networking with peers and/or thought-leaders” as a growing driver of value. Generation Z, it appears, crave social connections and are eager for professional growth opportunities.
How do you source educational content for your conference?

- **Mix of both invited and open call**: 56%
- **Open call for speakers, papers or abstracts**: 16%
- **Invited speakers/presenters**: 26%
- **Other**: 3%

Who determines which content is ultimately selected for the conference?

- **Conference, education or other committee**: 71%
- **Peer review**: 8%
- **Association staff**: 9%
- **Other**: 12%
Which types of content do you currently provide at your conference? (Select all that apply.)

- Session presentations: 89%
- Speaker/presenter bios: 65%
- Awards: 63%
- Posters: 44%
- Worksheets/handouts: 37%
- Abstracts: 32%
- Papers: 32%
- Supplemental videos: 19%
- Other: 6%

How do you distribute this content to your attendees? (Select all that apply.)

- Online/web-based digital materials: 73%
- Conference app: 65%
- Printed materials: 59%
- Offline digital materials (USB, DVD, CD): 12%
- Other: 3%
What is the primary source of influence on which formats you offer?

- Feedback from attendees/members: 52%
- Conference budget: 20%
- Board or executive input: 11%
- Recommendations from peers: 5%
- Recommendations from predecessors: 4%
- Other: 8%
What is the primary source of influence on which formats you offer? (Segmented by role within the organization.)
LOOKING TO THE FUTURE

It’s not just about the formats being used to deliver content. There are potentially some big changes on the horizon for how attendees want the content to be presented.

Associations continue to note shifts in how attendees want to receive and consume conference content, although the rate of change has slowed slightly as web-based and mobile content has increased in prevalence at conferences.

This year marked a noted change in the number of respondents who plan to increase the number of content delivery formats they offer at the conference. Budgets for conference content were also expected to increase accordingly.

What will the content mix of the future look like? There seems to be continued uncertainty among respondents. A five-year measurement of current and future predictions by meeting planners shows a potentially significant decline for certain formats—most notably print. But this has yet to materialize. Organizations are still hesitant to completely abandon print in favor of digital content, and are instead opting to offer both.

Respondents are also noticing preferential shifts that align with emerging themes in training and learning. Attendees, they observe, are starting to favor educational content that is short-form, visual and interactive. The question is how to best apply these content trends in a way that works in an environment designed for in-person delivery of complex content.
Are you seeing a shift in the formats that attendees prefer?

- Yes: 64% in 2019, 70% in 2018
- No: 18% in 2019, 13% in 2018
- Unsure: 18% in 2019, 17% in 2018
What shifts are you seeing in how attendees want to receive and consume conference content?

- **Printed material**: 56% Less demand, 27% No change to demand, 5% More demand, 7% Unsure
- **Web-based material**: 68% Less demand, 21% No change to demand, 5% More demand, 5% Unsure
- **Mobile-friendly material**: 65% Less demand, 13% No change to demand, 12% More demand, 8% Unsure
- **Shorter content**: 46% Less demand, 22% No change to demand, 21% More demand, 9% Unsure
- **Interactive or dynamic content**: 48% Less demand, 22% No change to demand, 23% More demand, 4% Unsure
- **Visual-based content**: 42% Less demand, 25% No change to demand, 25% More demand, 5% Unsure
- **Text-based content**: 39% Less demand, 8% No change to demand, 80% More demand, 2% Unsure
- **Ability to comment within content**: 30% Less demand, 25% No change to demand, 31% More demand, 10% Unsure
Do you expect to change the number of formats you use to provide content at your 2019 conference?

How will your association’s budget for conference content change in 2019?

Looking to the Future
Which formats do you currently use to deliver content?

- **Print**
  - 2015: 96%
  - 2016: 81%
  - 2017: 85%
  - 2018: 80%
  - 2019: 81%

- **CDs/USBs**
  - 2015: 42%
  - 2016: 54%
  - 2017: 62%
  - 2018: 52%
  - 2019: 44%

- **Online**
  - 2015: 59%
  - 2016: 59%
  - 2017: 66%
  - 2018: 55%
  - 2019: 51%

- **Mobile App**
  - 2015: 46%
  - 2016: 58%
  - 2017: 61%
  - 2018: 66%
  - 2019: 59%

Which formats do you plan to use in the future?

- **Print**
  - 2015: 51%
  - 2016: 46%
  - 2017: 14%
  - 2018: 15%
  - 2019: 18%

- **CDs/USBs**
  - 2015: 42%
  - 2016: 54%
  - 2017: 62%
  - 2018: 52%
  - 2019: 44%

- **Online**
  - 2015: 59%
  - 2016: 59%
  - 2017: 66%
  - 2018: 55%
  - 2019: 51%

- **Mobile App**
  - 2015: 46%
  - 2016: 58%
  - 2017: 61%
  - 2018: 66%
  - 2019: 59%
CONTENT CHALLENGES

Meeting planners face increased challenges as they offer attendees new choices.

For the first time ever, “managing last-minute content changes” surpassed “managing the collection and review process” as the most common challenge among meeting planners. Last-minute changes to content and schedules is nothing new, but having to manage these changes across multiple formats—and potentially multiple vendors—becomes an increasingly time-consuming endeavor.

Managing the collection and review process continues to be perceived as the single greatest challenge for a majority of respondents—a trend that has held steady since this report was first published in 2015.

The one challenge that saw the greatest year-over-year decrease was “offering a mix of formats to meet the needs of all members.” With more organizations providing three to four different ways for attendees to access conference content, this is less of a focus for associations.

Emerging trends that gained more prominence this year include delivering mobile-friendly content and offering the right mix of formats to support learning retention. In an effort to meet the needs of new, often younger members, many training and education professionals are thinking about how to deliver content in a way that is easy to access, easy to consume and facilitates deeper learning. As a primary method for delivering educational content to members, it’s no surprise that these themes are emerging among conferences.
What are your top challenges with managing and distributing your conference content? (Select all that apply.)

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Managing content changes</td>
<td>51%</td>
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<tr>
<td>Managing the collection and review process</td>
<td>44%</td>
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<td>Leveraging content after the conference</td>
<td>38%</td>
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<tr>
<td>Offering a mix of formats to meet the needs of all members</td>
<td>36%</td>
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<td>Delivering mobile-friendly materials</td>
<td>33%</td>
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<tr>
<td>Offering best formats to support learning retention</td>
<td>33%</td>
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<tr>
<td>Keeping up and understanding new technology options</td>
<td>32%</td>
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<td>Monetizing content</td>
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<td>Managing access control</td>
<td>21%</td>
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<td>Putting content online</td>
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<td>Managing multiple vendors</td>
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<tr>
<td>Other</td>
<td>7%</td>
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Which of these is your single greatest challenge?

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<thead>
<tr>
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<td>Managing access control</td>
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<td>Putting content online</td>
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<tr>
<td>Delivering mobile-friendly materials</td>
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<tr>
<td>Managing multiple vendors</td>
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REPURPOSING CONFERENCE CONTENT

There are still untapped opportunities to increase the conference footprint through content.

A majority of associations continue to re-use conference content outside of the event, although adoption of this practice has stalled in the past year, with no increase in the number of associations that have put this practice into place.

With the focus on increasing attendance, most conference planners are using their content to promote next year’s event, creating a fear of missing out (FOMO), which is particularly effective at motivating younger members to participate.

But younger members are also actively seeking opportunities to create and maintain connections and tap into professional development opportunities on more than just an annual basis. As organizations look to shift the demographic profile of their conferences, there is opportunity to use this content to extend the conference experience beyond the venue.
Do you currently re-use your content from your conference for any purpose?

- Yes: 55%
- No: 32%
- Unsure: 13%

How do you re-use this content? (Select all that apply.)

- Promotion for next year's event: 42%
- Reinforce learning after the conference: 26%
- Ongoing content marketing for the association: 25%
- Revenue generation: 20%
GENERATIONAL READINESS

Based on the size of the Millennial and GenZ populations, associations should have every opportunity to grow membership and conference attendance in the coming years.

According to the Census Bureau, the number of Millennials in the U.S. has eclipsed Baby Boomers. Meanwhile, Bloomberg estimates that Gen Z will surpass Millennials in size. This means the pipeline for prospective members is substantial, if associations can connect with them and deliver the value they’re looking for.

Unfortunately, associations are not yet seeing a corresponding rise in the number of Millennial and Generation Z members. Respondents indicate that Baby Boomers still comprise the majority of members and conference attendees. The reason? A significant percentage of associations have not developed a strategy to address the needs and preferences of younger professionals.

With the oldest of Millennials turning 37 in 2019, the idea of preparing for this generation may be behind us. Generation Z, however, is just starting to enter the workplace. As they do, they bring good news for association leaders and conference planners. All indications are that this is a more pragmatic generation who are actively seeking out professional development opportunities and personal connections. They are also the largest generation—reported to be larger than Millennials or Baby Boomers, making Generation Z a prime target for associations.
Has your association developed a strategy to address the needs and preferences of Millennials?

Has your association developed a strategy to address the needs of the post-Millennial generation (Generation Z)?
Approximately what percentage of your association’s membership falls into each of the following demographic categories?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Baby Boomers</th>
<th>Generation X</th>
<th>Millennials</th>
<th>Generation Z</th>
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Approximately what percentage of your conference attendance falls into each of the following demographic categories?

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Conference attendee demographics mirror association membership demographics, making it difficult to increase the number of younger professionals at the annual event.
PARTICIPANT DEMOGRAPHICS
What industry does your association serve?

- Health & medical: 30%
- Trade/Professional: 23%
- Education: 15%
- Science/Technical: 8%
- Engineering: 8%
- Legal: 4%
- Environmental: 3%
- Other: 9%

What is your primary area of responsibility?

- Conference planning: 50%
- Executive: 20%
- Education: 10%
- Membership: 6%
- Communications: 3%
- Publications: 2%
- Other: 9%

How many members does your association have?

- 1,000 or fewer: 28%
- 1,001 - 2,500: 19%
- 2,501 - 5,000: 13%
- 5,001 - 10,000: 10%
- 10,001 - 25,000: 10%
- 25,001 - 50,000: 4%
- 50,001+: 6%
- Not a member organization: 10%
QUESTIONS TO CONSIDER

The goal of this report is not only to shed light on some common trends facing associations, but to also help organizations take action. As you prepare for your next conference, here are some questions to consider and discuss with your stakeholders, peers and members:

1. How closely do your Conference and Membership teams currently work together? Are there ways you could better integrate and coordinate your efforts, so that you’re both working toward a shared goal?

2. Are there current/emerging adult learning trends (like micro-learning, just-in-time learning and increasing retention, for instance) that you’re keeping an eye on? How might these trends impact or change the structure of your conference? How conference content is delivered to attendees?

3. What aspects of managing your collection and review process are the most challenging each year? Are there any simple changes you could make so that you can have more time to focus on other tasks?

4. What steps can you take to make it easier to manage last-minute content changes across multiple formats?

5. What are some new and non-traditional ways you can re-purpose your conference content to keep attendees engaged year-round?

6. What are 2-3 small steps you can take in the coming year to help your association better understand and connect with young professionals? Are there a few, simple tactics surrounding the conference (before, during and after the event) that you can test?
NOTES:
ABOUT OMNIPRESS

Omnipress was founded to help associations and other organizations collect, produce and distribute educational content for conferences, instructor-led courses and member publications.

Forty-plus years and over 30,000 conferences later, we provide more than industry-leading products and services. We offer guidance and best practices to help simplify the process of getting materials into your members’ hands.

Our portfolio of products and services include:

- CATALYST® Abstract, Speaker and Content Management System
- Digital Conference Materials
- Mobile Conference App
- Printed Conference Materials
- Print and Fulfillment Services

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