Virtual and Hybrid Meetings for Generation X: Using the Delphi Method to Determine Best Practices, Opportunities and Barriers

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ABSTRACT

The purpose of this study is to identify best practices, opportunities and barriers when planning virtual and hybrid meetings for a Generation X audience, 35 to 48 year old cohort within the USA. Through the use of the modified Delphi method, a panel of expert meeting planners contributed to four rounds of Delphi surveys determining group consent. Members of this panel had previously planned traditional, hybrid and virtual meetings for corporations, associations, and/or government. For virtual meetings, final recommendations for best practices included having planners collaborate with content designers of meeting, including interactive experiences, and including interaction with live experts. For hybrid meetings, best practices recommended comprised of including real world examples, providing easy to use and convenient technology, and having planners collaborate with content designers of meeting. Opportunities and barriers for each meeting genre are also identified.

INTRODUCTION

Members of Generation X were born between 1965 and 1978 and comprise about 45 million people (DeMarco, 2007). Sandwiched between the Baby Boomer Generation and Generation Y, and smaller than each generation, those within Generation X will continue to make up approximately 30% - 32% of the workforce through 2020 (DeMeuse, 2010). Out of all of the generations, Generation X is the best educated within the history of the United States and compared to other generations, they have the highest employment proportion at 86% (Keene & Handrich, 2011). Generation X has a high preference for business communication via the Web and e-mail and is known to be technologically savvy (Reisenwitz & Iyer, 2009). In the workplace and in meetings, Generation X expects immediate results (Fenich, Scott-Halsell & Hashimoto, 2012). This generation's ease and comfort with technology provides planners opportunities to provide meetings in virtual and/or hybrid environments.

Within the meeting industry, best practices, opportunities and barriers need to be identified to best accommodate the expectations of Generation X. Therefore, it is imperative to assess how the needs of Generation X are being incorporated into virtual and hybrid meetings being planned and how meeting professionals can better design meetings to attract Generation X. This study utilized a modified Delphi technique to determine the best practices, opportunities and barriers regarding virtual and hybrid meetings involving Generation X. Based on the criteria of the Delphi technique, group consensus was formed by an expert panel of meeting planners with regard to the virtual and hybrid meeting preferences for Generation X. The Delphi method has been effectively utilized by government agencies, research institutions and many other organizations and has been considered an appropriate method for gaining a group consensus on topics of interest (Day, 2002; Crews, 2004).

Virtual and hybrid meetings were chosen specifically for this study as they are identified in the literature as the newest genre of meetings being planned and are critical to the growth of the

meetings and events industry (PCMA Invests in Virtual and Hybrid Meetings, 2011). Virtual meetings are explained by the industry as "digital events, meetings and learning technologies that include: webcasting (streaming media); virtual environments (2D and 3D) such as virtual events, virtual trade shows, conferences, campuses, learning environments; and perpetual (365 days per year) business environments" (PCMA, UMB Studios and VEI, 2011, p. 3). Hybrid events "involve a mixture of physical events with elements of a virtual event usually running simultaneously and with overlapping content and interactive elements" (Virtual Edge Community, www.virtualedge.org/page/virtual-event-definitions, p. 1). By 2015, the virtual and hybrid meeting market is predicted to grow to an $18.6 billion dollar industry (PCMA, UMB Studios & Virtual Edge Institute (2011). In The Professional Convention Management Association (PCMA), UBM Studios and Virtual Edge Institute (2011) proposed that virtual meetings have been a favored method of meetings versus in-person meetings, and according to Meeting Planners International (MPI) Foundation (Fryatt et al., 2012), all meeting events will eventually utilize a hybrid platform.

METHODOLOGY

Through purposive and snowball sampling, a group of 46 meeting industry experts were identified and solicited for this study. Commitment was gained from 22 meeting professionals who agreed to participate with 12 completing all four rounds of the Delphi study. The expert panel was comprised of meeting management professionals who have experience with virtual and hybrid meetings and met the following two criteria: (1) individuals must have worked as a meeting planner (or have the job components thereof) within the past two years and have at least five years of meeting planning experience; and (2) individuals must have planned a virtual meeting or a hybrid event within the past two years.

The Delphi technique utilized within this study was modified from the classical Delphi technique by including an initial list, gathered from a literature review, which was supplied to the participants instead of beginning the Delphi with a blank page. In Round One, researchers gave the expert panel a list of recommended best practices, opportunities and barriers which were collected from recent industry literature and publications. The panel was asked to keep, add, delete or edit the recommendations provided. The recommendations were categorized separately as hybrid or virtual meetings' best practices, opportunities and barriers. In Round Two, the panel members were given the results from Round One and asked to keep, add, delete or edit recommendations on the list. Participants could add back something deleted in Round One if they viewed the item as important. In Round Three, the panel was asked to then rank the recommendations (resulting from Round 2) on a 5 point Likert-like scale (5 = Definitely Keep to 1 = Definitely Delete). In Round Four, the final round, the panel was given their selected rankings (1-5) for each recommendation from the previous round, along with the group mean for each recommendation. To gain group consensus, a main goal of the Delphi technique, panel members were then asked to retain or alter their scores based on the group means. Common consent was deemed if two-thirds of all participants rated the item with a 4 or 5 on a 5-point

Likert-like scale (5 = Definitely Keep to 1 = Definitely Delete) (Crews, 2004). This manuscript focuses on the top recommendations based on a mean score of 4.0 or higher.

RESULTS AND DISCUSSION

Through the use of the Delphi method obtaining common consensus, a final list of 17 recommendations within the categories of best practices, opportunities and barriers for virtual and hybrid meetings for Generation X are identified (as noted in Table 1 and Table 2). The top recommendation for best practices in virtual meetings is for planners to collaborate with content designers of meetings. These findings support Perine's (2012) perception of Generation X meeting attendees in that they prefer to be prepared for the meetings they attend. Smith and Clurman (1997) mention that individuals within generation X tend to focus on "real-world effectiveness" (p. 133). This information supports the best practices recommendation of interaction with live experts, in addition to the barrier recommendation of perception of effectiveness. Beekman (2011) mentions that those within Generation X prefer direct communication and do not like to waste their time which also supports the barrier of the perception of effectiveness.

There is a best practices recommendation within the virtual opportunity category for reviewing presentation materials in advance. Smith and Clurman (1997) discuss this generation's preference for straightforward information and practical use of their time. By reviewing materials in advance, the planner can make the necessary adjustments to accommodate these preferences in addition to identifying any concerns about the presentation that may not be practical from a time and/or information standpoint.

Within the virtual category for opportunities, there is a recommendation to include interactive components. Smith and Clurman (1997) mention that while Generation X uses technology for practical and functional purposes, they also see it as an opportunity for fun. Klie (2012) notes that this generation looks for a sense of connectivity and affinity, and recommends that they are spoken to as peers versus authority figures. This supports the virtual best practice for including interactive components.

Table 1: Round four results in order of highest mean score		
VIRTUAL	**Recommendation**	**Mean Score**
Best Practices	Planners should collaborate with content designers of meeting	4.33
	Include interactive experiences	4.16
	Include interaction with live experts	4.00
Opportunities	Include interactive components	4.42
	In advance, review materials that will be presented	4.00
Barriers	Perception of effectiveness	4.00

Table 2 outlines the best practices, opportunities and barriers recommended for hybrid meetings including a Generation X audience. The top recommendation for best practices in hybrid meetings is for planners to include real world examples. This finding supports Perine's (2012) perception that this generation prefers to work with factual information. In addition, Smith and Clurman (1997) state that those within this generation focus on "real-world effectiveness" (p. 133), again supporting the recommendation for real-world examples in addition to supporting the barrier for perception of effectiveness. Offering shorter sessions to remote participants was identified within the best practices category of hybrid meetings. This finding is in line with a MPI article on hybrid events (Fryatt, et. al., 2012b) stating that shorter contents are preferred by remote attendees.

Within the opportunities category for hybrid events, all of the recommendations refer to engagement (keep audience engaged; offer more hands-on application opportunities; include interactive components; and audience engagement opportunities). As with the virtual opportunity recommendation for interactive components, these too are supported by Smith and Clurman (1997), Beekman (2011), and Klie (2012). In addition, Fryatt et al. (2012b) notes that while content promotes attendance at meetings, engagement keeps attendees at the meetings and promotes return attendance. Also noted within this article is the necessity of interactive sessions to keep attendees engaged while at the meeting.

Within the barriers noted for hybrid meetings, the perceptions of time worthiness and effectiveness are identified. Both of these barriers are considered when Beekman (2011) discusses the preference for direct communication and time efficiency for Generation X. The barrier for creating a sense of belonging is considered by Klie (2012) noting Generation X prefers a sense of connectivity and affinity. This barrier was also mentioned by Fryatt et al. (2012a) who reported that this was most important for remote participants and that virtual audiences should be acknowledged and valued throughout the meeting. One suggestion was to provide exclusive content as an opportunity to create this sense of belonging and value for these participants.

Table 2: Round four results in order of highest mean score

HYBRID	Recommendation	Mean Score
Best Practices	Include real world examples	4.75
	Provide easy to use and convenient technology	4.50
	Planners should collaborate with content designers of meeting	4.50
	Offer shorter sessions to remote participants	4.25
Opportunities	Keep audience engaged	4.42
	Offer more hands-on application opportunities	4.42
	Include interactive components	4.33
	Audience engagement opportunities	4.33
Barriers	Perception of time worthiness	4.33

Create a sense of belonging	4.08
Perception of effectiveness	4.08

IMPLICATIONS

The results of this study indicate that meeting professionals should consider the preferences of Generation X when designing and executing virtual and/or hybrid meetings in which they are attending. Based on the results of the Delphi method, different recommendations (or different priorities were placed on overlapping recommendations) for the use of best practices, opportunities and barriers to consider when planning and executing virtual and hybrid meetings. For meeting genres, planners should collaborate with the content designers of the meeting (best practices), include interactive components (opportunities) and consider the perception of effectiveness (barrier).

The barriers noted for consideration within this study highlight opportunities for marketing virtual and hybrid meetings to Generation X. In order to effectively market a product, marketers need to understand their customer's needs. The goals of marketers include providing value to a target market, motivating a purchase, and then satisfying the needs of their customers (Kotler, Bowen & Makens, 2010). Marketing journals emphasize the value of consumer research and promote the need to understand the motivations and attitudes of consumers for marketing success (Heath & Heath, 2008). This study notes the perception of time-worthiness and the perception of effectiveness as barriers that should be considered when planning virtual and hybrid meetings for a Generation X audience. With this in mind, marketers have the opportunity to address these barriers by promoting the value of time worthiness and effectiveness within these meetings directly to this generation. If Generation X can identify why and how these meetings are worth their time and how they prove to be effective, attendance from this generation is likely to increase.

CONCLUSION

This research provides a foundation for meeting planners to use when planning virtual and hybrid meetings for Generation X. Based on the findings of this research, meeting planners should consider the preferences of Generation X when including them as attendees. The results offer a helpful tool for meeting professionals as well as add to the foundation of academic research currently being built. While there is a gap in the academic research within this area, there is an immediate need to better understand these types of meetings within the MEEC industry due to the quickly evolving advances of technology.

Limitations

The meeting planners who participated in this study represented eight states (within the United States), but including additional representation would have offered a wider range of viewpoints and information. The addition of international planners would have also increased the richness of the knowledge obtained through this study.

Future Research

     This study identifies best practices, opportunities and barriers for virtual and hybrid meetings. While this information has been identified, there is opportunity for future research within these categories providing a "next step" for meeting professionals. How can meetings including Generation X, for example, be more interactive? What is the best way to engage the Generation X audience in virtual and hybrid meetings? What is the most effective way to market to this generation to promote value in the perception of time-worthiness and effectiveness? Many of these recommendations can now be further explored.

     Technology is quickly evolving, providing a continuous feed of new opportunities for meeting planners to implement within the planning and execution of their meetings. Future research can re-address these technological preferences due to ever-changing technology and the continuous increase in the technological savvy of the meeting attendees (and meeting planners). In addition, future research can address new and innovative opportunities as they arise and provide additional answers to how these recommendations can be best implemented using cutting edge technology.

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