




# The Lumi take: Meeting trends for 2024





With 2024 well underway, here at Lumi, we're looking forward to what the next year will bring.

From playing an integral part in the 2024 AGM season globally to collaborating with the IR community to facilitate meetings that improve stakeholder engagement, gearing up to tackle the virtual, hybrid and in-room meetings of the year ahead feels exciting.

In 2023, Lumi ran over **3000** meetings worldwide, accommodating over **200,000** online stakeholders - and 2024 looks set to be another busy year. Read on to discover observations and insights from the voices of the Lumi team worldwide, as we share the meeting trends that you'll want to know about in 2024.



In 2023, we ran over  
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The staying power of virtual  
and hybrid meetings

Lumi's research shows that although the return to in-room meetings continued in 2023 post-pandemic, the popularity of hybrid meetings has also increased among our clients, growing year-on-year from 2021. The overall percentage of hybrid meetings taking place has grown from just 9% in 2021 to 40% in 2023.

The reason for the popularity of these meetings is clear – hybrid and virtual meetings offer the opportunity for a larger and more diverse sample of stakeholders to access the event wherever they are.



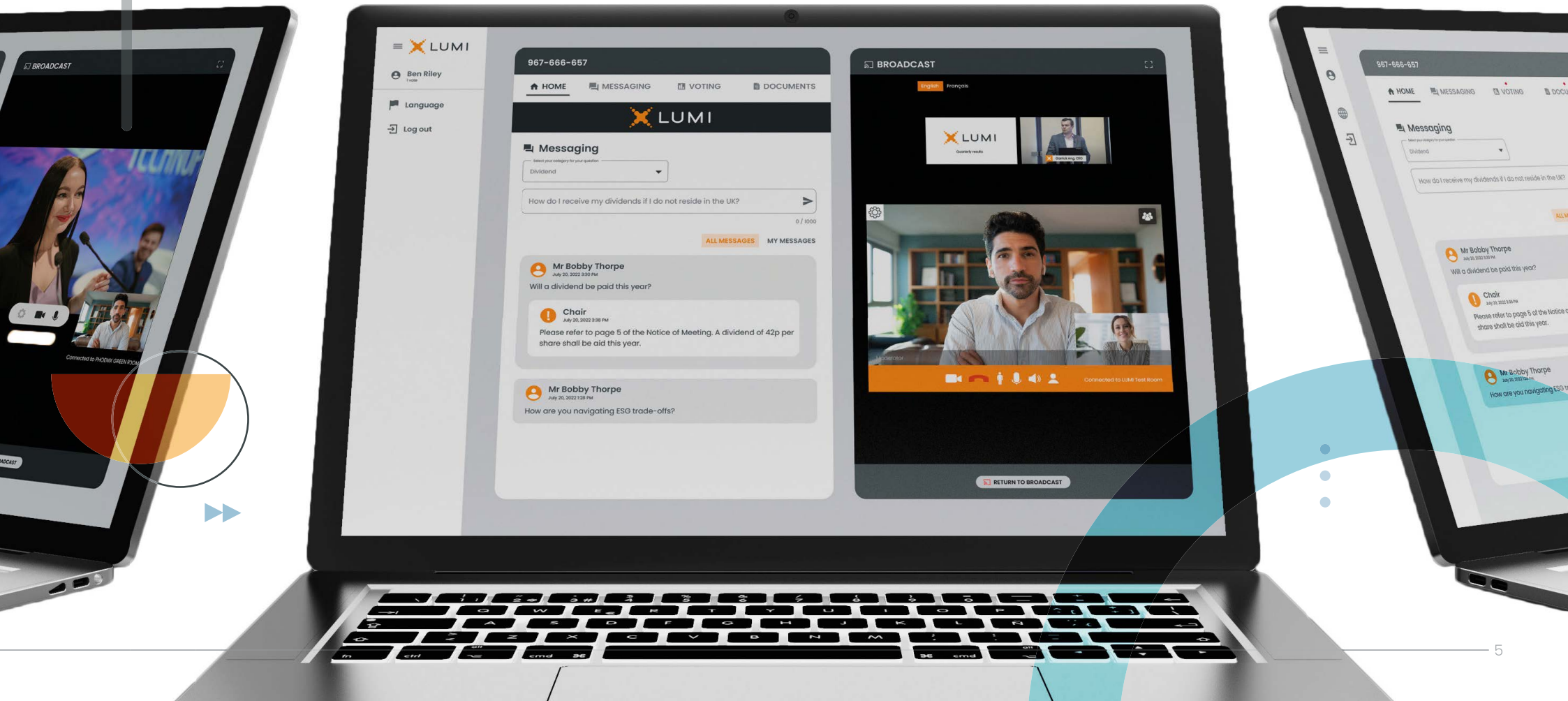
Whilst in-person meetings continue to return to pre-2020 levels, we have seen a hybrid approach increase in popularity and this looks to grow in 2024.

Simon Bryan  
Managing Director  
Lumi Global, Americas



As well as broadening reach and accessibility by allowing more stakeholders to attend meetings, virtual and hybrid formats champion sustainable business practices, making them a win for businesses that have ambitious ESG agendas and goals.

In addition, having a partner that seamlessly consolidates both in-person and virtual elements into a singular platform enables stakeholders to actively participate through a [virtual microphone](#) or submit written questions. Consolidating in-person and virtual therefore becomes pivotal for helping to engage stakeholders throughout the year.

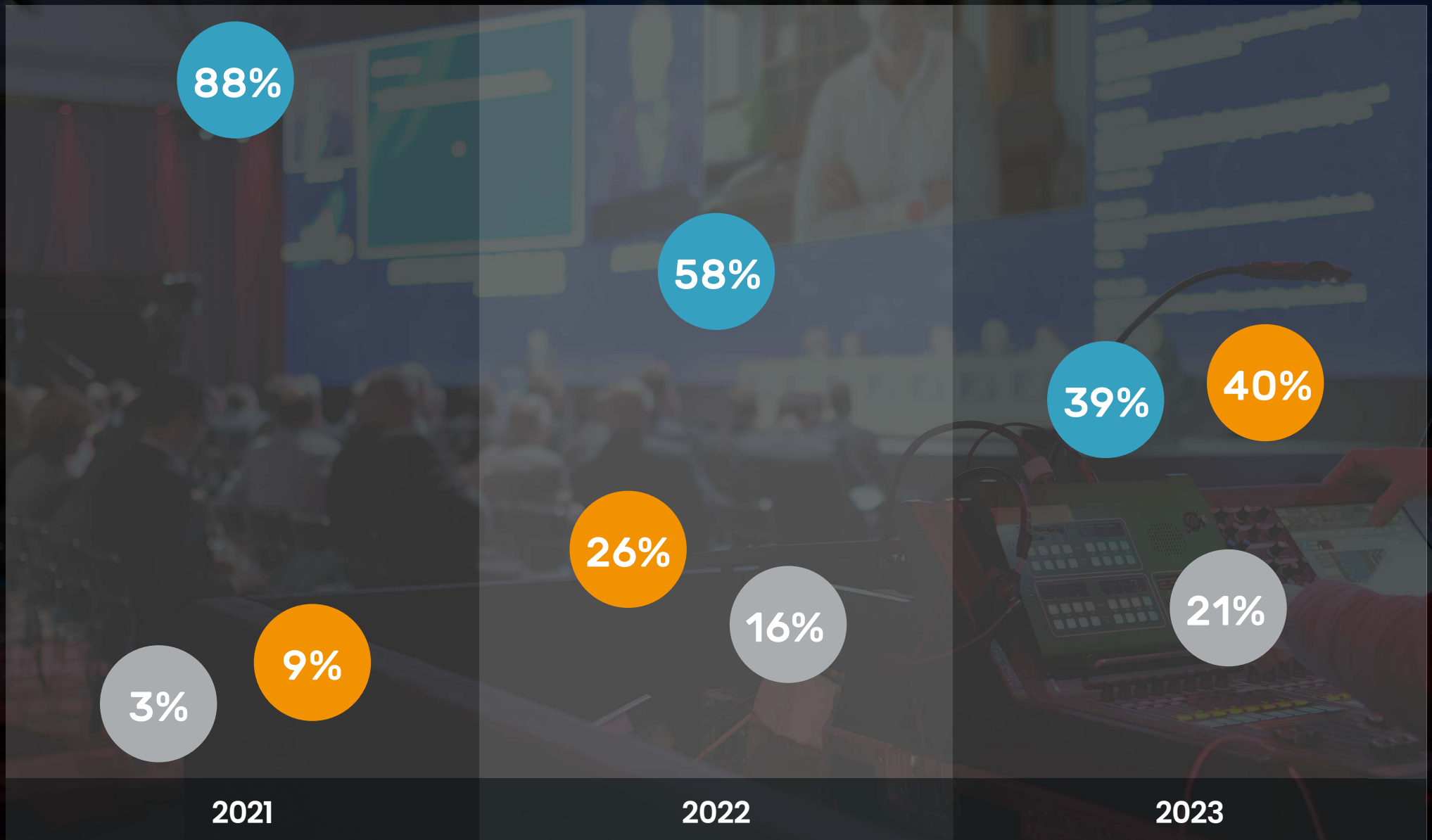


# Lumi's meeting format split from 2021 to 2023

● Hybrid

● Virtual

● In-room



A miniature model of a community, possibly made of wood or plastic, featuring a large, leafy tree in the center. Numerous small human figures are scattered around the base of the tree, some sitting on blocks, some standing, and some interacting. The scene is set on a textured, light-colored surface. The entire image is overlaid with a dark, semi-transparent filter, and a thin orange border frames the central text area.

# Responding to the ESG demand

**80%** of investors say that ESG is a crucial factor in their investments

ESG often dominates the headlines and Q&A sessions at capital market meetings, with issues like executive pay, gender diversity at the board and senior executive levels and climate change disclosures surfacing repeatedly.

And the evidence suggests that investors are driving demand for ESG – nearly **80% of investors** said that ESG was a crucial factor in their investment decision-making in a recent PWC survey.

In 2024, success in the ESG arena will mean engaging with your investors more frequently throughout the year, helping to foster an ongoing dialogue. It also means a renewed importance being placed on reporting to demonstrate transparency and accessibility.



2024 is now a pivotal year for governance in ESG, as we see the spotlight extend beyond superficial evaluations and delve into inner-circle board dynamics, ensuring a proper understanding of corporate decision-making processes.

**Sylvie Harton**  
Chief Business Strategy  
Officer, Lumi Global







# The emerging role of AI

AI and its uses are the matter of the moment in 2024. It's a tool that should be seen to empower and enable IROs to deliver impactful and highly engaging IR programmes and can benefit Issuers, regulators, and shareholders alike. When it comes to stakeholder meetings, implementing the power of automation can save you time and provide deeper insight into your attendees.



In 2024, tools like [ChatGPT](#) can be used by IROs to speed up the script-writing process ahead of meetings. Additionally, tools like [SpeechCraft Analytics](#) can be implemented to understand executives' speech patterns during earnings calls, offering deeper insights into their intentions. With all the possibilities that AI offers, from saving IROs and corporate secretaries valuable time to helping with personalisation when speaking to stakeholders, now is the time to add this technology to your toolkit.



The advent of artificial intelligence software is front of mind for clients in 2024.

Jeff Robinson  
Sales Director,  
Lumi Global



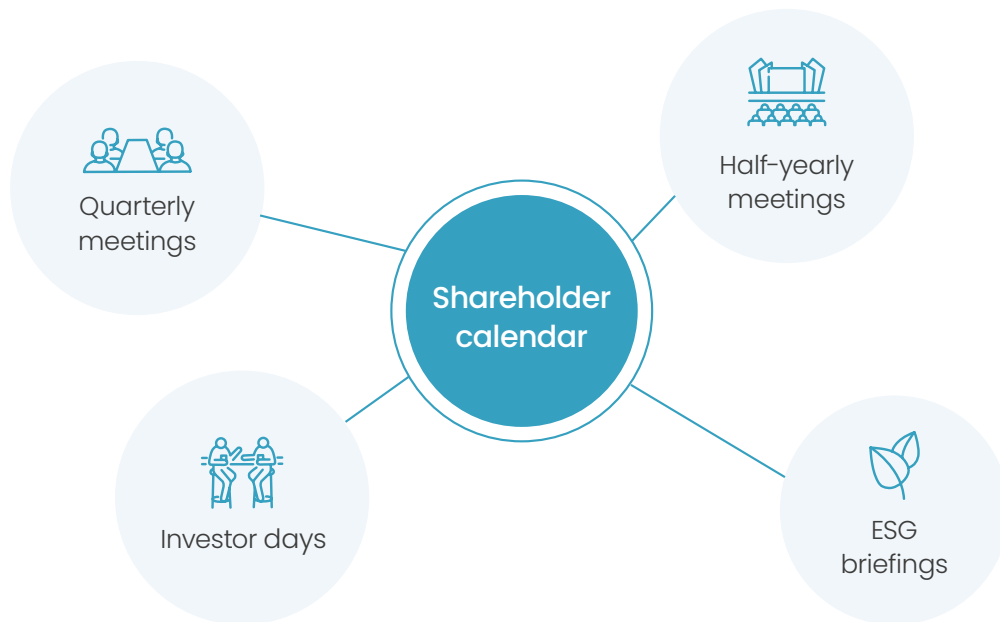


IR meetings stepping  
into the spotlight

Good governance is about prioritising transparent, regular communication with investors. To facilitate this, businesses need to extend their communication to multiple touchpoints across the year. Investors are no longer content with one annual meeting to voice their opinions and concerns.

Instead, in 2024, the AGM must work in conjunction with multiple events in the shareholder calendar to guarantee accessibility, transparency and stakeholder engagement.

This year, with IROs having an increased focus on identifying the right type of investors and growing their investor base, holding those all-important quarterly and half-yearly meetings as well as ESG briefings and Investor Days will become the defining factor of success for businesses. Organising additional check-ins throughout the year similarly benefits analysts, whose focus is to ensure that the financial story of the business is understood by the wider investor community.



As good corporate governance practice entails further outreach and interaction with shareholders, and as those holders, particularly on the retail side, look for increased engagement, the Annual Shareholder Meeting is increasingly being seen as another IR touchpoint, and not just a regulatory check box.

**Peter Fowler**  
Chief Operating Officer,  
Lumi Global

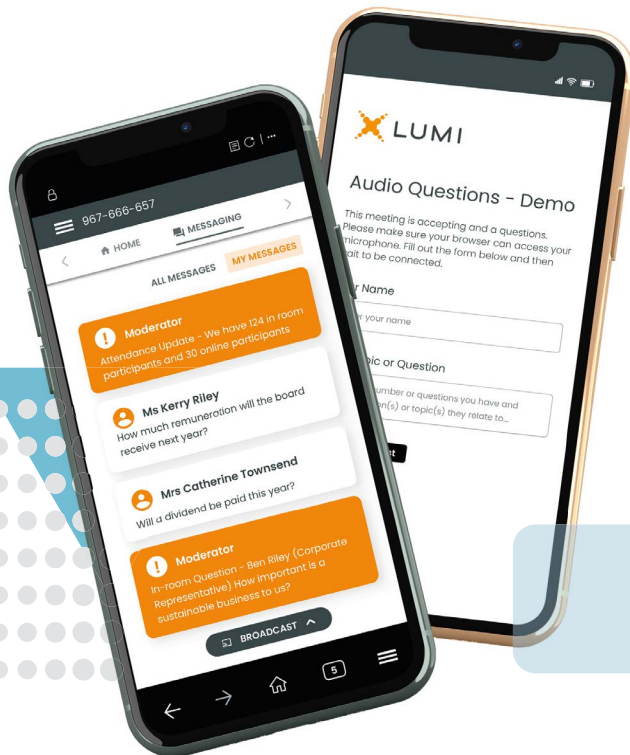


A woman with long dark hair and glasses is looking at a tablet computer. She is wearing a dark jacket. The background is dark with glowing blue and green digital data, including lines of code and circular patterns. The text is centered in a white box with a thin black border.

The need for reliable  
technology to enhance  
connectivity

As issuers look to provide regular touchpoints throughout the year with stakeholders, technology is playing an increasingly integral part in ensuring accessibility and transparency. As such, the demand for reliable meeting technology software is increasing.


Tools that allow for real-time, two-way debate, as well as facilitate equal access to technology that facilitates Q&A, polling, virtual video, legislative voting and elections for both in-room and remote audiences are key.



There is now an increasing desire for higher production meetings which include features such as video, high-quality presentations and live, verbal and written questions from shareholders.

**Simon Bryan**  
Managing Director  
Lumi Global, Americas





The Lumi features that will set  
your meeting apart in 2024

Lumi is a capital markets meetings expert, well-versed in providing high-quality, high-production meetings and services that assist Issuers, Registrars, and event organisers.

We aim to improve mission-critical meeting engagement and experiences. To do this, we provide software and hardware that can register delegates, provide live, secure polling, Q&A management services, and audited reporting through pioneering technology.



The introduction of virtual video into the market will transform the way stakeholders view virtual meetings. They will be more likely to want to attend virtually with this ability being provided.

**Andrej Vadar**  
Managing Director at Lumi  
Global, South Africa





The key features of our offering include:



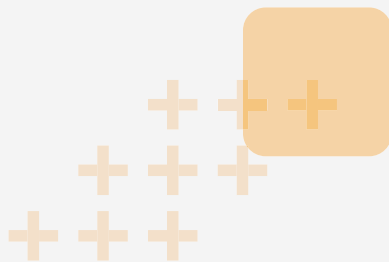
### White glove service

Virtual, in-room or hybrid meetings can be provided with full white glove service, maintained by a skilled team or licensed remotely for a self-service offering.



### Virtual video & microphone

Our technology allows stakeholders to ask audio and video questions during the meeting.



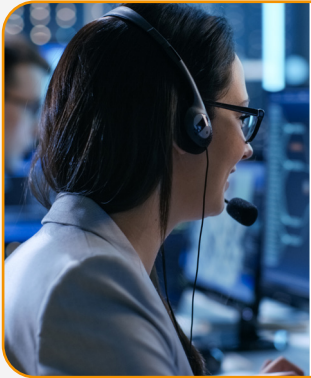
### Low-latency streaming

With Lum's unrivalled low-latency technology, our clients can hold productive and efficient meetings, which allow for real-time transmission of audio and video with minimal delay.



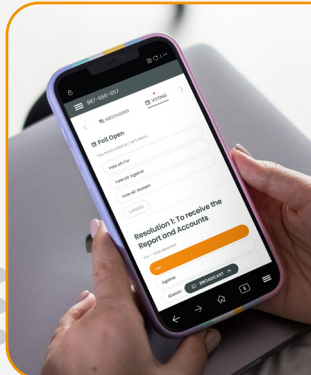
### Unmatched reliability

Our streamlined meeting solutions offer organisers peace of mind. You can depend on Lumi for your critical engagements.



### End-to-end meeting support

From registering stakeholders to supplying live or post-meeting analytics, reporting, transcripts and on-demand playback after the meeting.



### Extensive voting options

Lumi's transparent voting system, all results are captured in real-time and seamlessly merged with any existing proxy votes to provide instant resolutions, ensuring every vote counts.



### Accredited meeting security

**Lumi's SOC2 accreditation** validates that we manage the data and security of our customers to the highest of standards.



Issuers have started recognising the need for the platform they are using to be as secure as possible. They are looking for platforms that are robust when it comes to the security of the platform against unwanted access and disruption that could cause failure to their meeting.

André Cinq-Mars  
Managing Director  
Lumi Global, Canada



# Choose Lumi for your mission-critical meetings



Here at Lumi, we create engaging meeting experiences, tailored to your business needs. To discuss your next AGM or IR meeting, get in touch today.

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# Get in touch

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## AUSTRALIA

Gavin Reed

✉ [gavin.reed@lumiglobal.com](mailto:gavin.reed@lumiglobal.com)

☎ Sydney: +61 2 8075 0100

☎ Melbourne: +61 3 9044 0722

## CANADA

André Cinq-Mars

✉ [andre.cinq-mars@lumiglobal.com](mailto:andre.cinq-mars@lumiglobal.com)

☎ +1 514-642-3664

☎ +1 866-449-3664

## BELGIUM

Bart De Vry

✉ [bart.devry@lumiglobal.com](mailto:bart.devry@lumiglobal.com)

☎ +32 3 740 33 00

## FRANCE

François Lenormand

✉ [francois.lenormand@lumiglobal.com](mailto:francois.lenormand@lumiglobal.com)

☎ +33 1 84 19 57 80

## HONG KONG

Merion Trask

✉ [merion.trask@lumiglobal.com](mailto:merion.trask@lumiglobal.com)

☎ +852 3728 9700

## ITALY

Gabriele Limonta

✉ [gabriele.limonta@lumiglobal.com](mailto:gabriele.limonta@lumiglobal.com)

☎ +39 351 6620 167

## GERMANY

Daniel Matschke

✉ [daniel.matschke@lumiglobal.com](mailto:daniel.matschke@lumiglobal.com)

☎ +31 346 860 000

## NETHERLANDS

Frank Schoonhoven

✉ [frank.schoonhoven@lumiglobal.com](mailto:frank.schoonhoven@lumiglobal.com)

☎ +31 346 860 000

## MIDDLE EAST

Yousef Qaren

✉ [yousef.qaren@lumiglobal.com](mailto:yousef.qaren@lumiglobal.com)

☎ +971 4 501 5505

## SOUTH AFRICA

Andrej Vladar

✉ [andrej.vladar@lumiglobal.com](mailto:andrej.vladar@lumiglobal.com)

☎ Gauteng: +27 87 470 0734

☎ Western Cape: +27 87 470 0934

## SINGAPORE

Merion Trask

✉ [merion.trask@lumiglobal.com](mailto:merion.trask@lumiglobal.com)

☎ +65 6385 6676

## UNITED KINGDOM

Peter Fowler

✉ [peter.fowler@lumiglobal.com](mailto:peter.fowler@lumiglobal.com)

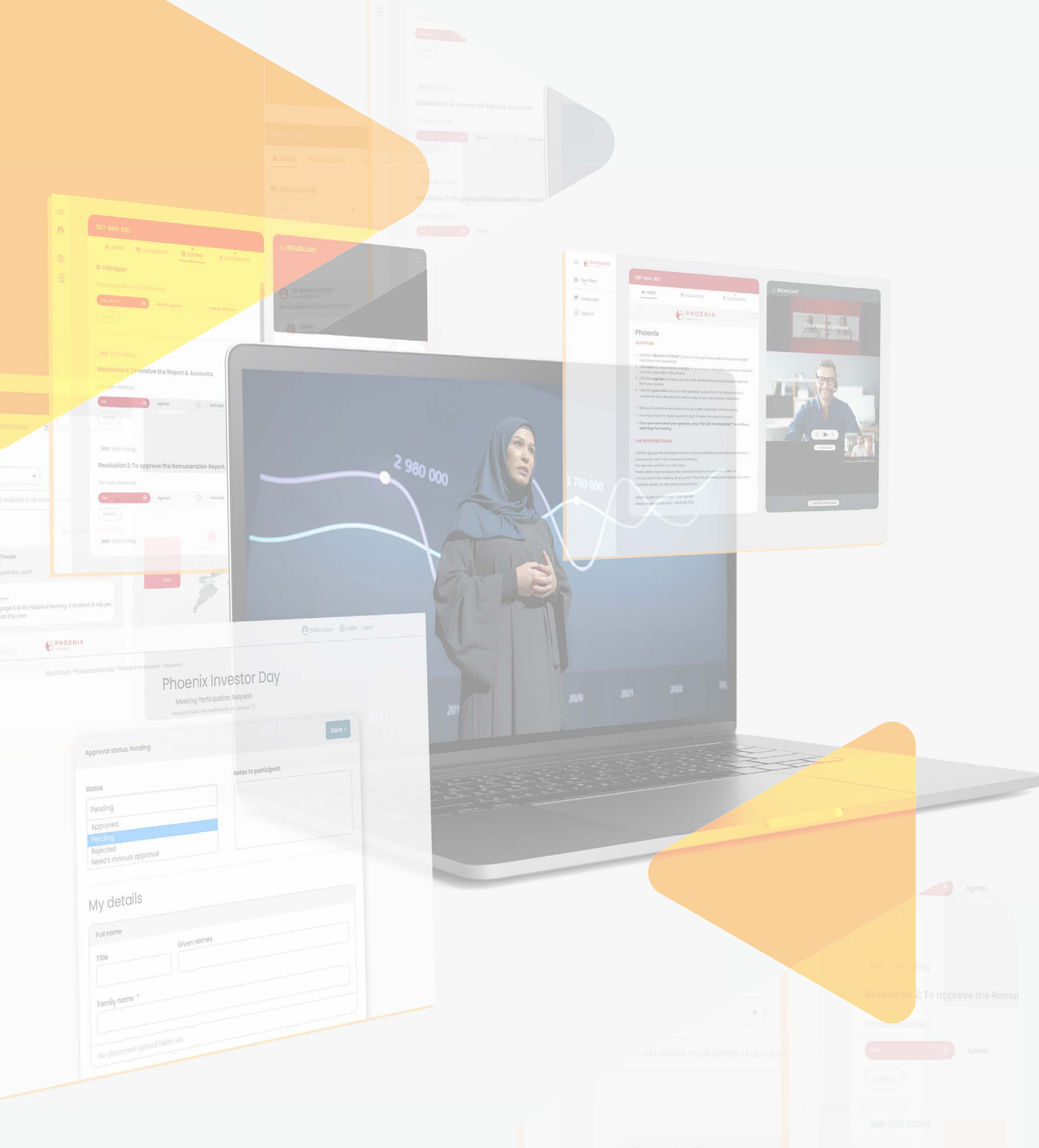
☎ +44 7500 760 643

## UNITED STATES

Simon Bryan

✉ [simon.bryan@lumiglobal.com](mailto:simon.bryan@lumiglobal.com)

☎ +1 612 851 2037



 [lumiglobal](https://www.linkedin.com/company/lumiglobal)  
[lumiglobal.com](https://lumiglobal.com)

