



2016 Global Meetings and Events Forecast



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Colin Weaver

2016 GLOBAL MEETINGS AND EVENTS FORECAST

Contents

Executive Summary	5
2016 Global Meeting Activity	8
Meetings Activity & Characteristics	9
Budgets & Planning	11
Group Hotel Rates	13
Global Meeting Property Demand & Supply	14
Global Group Air Trends	19
Global Trends	24
Meetings Program & Policy Trends	25
Emerging Regions	34
Special Sections	37
Incentives	38
Mobile & Social Media	46
Compliance	53

Trends by Region and Commentary	57
North America	58
Meetings Activity	58
Meetings Budgets & Planning	60
Meeting Locations	60
Pricing Trends	61
EMEA	63
Meetings Activity	63
Meetings Budgets & Planning	64
Meeting Locations	66
Pricing Trends	68
Asia-Pacific	69
Meetings Activity	69
Meetings Budgets & Planning	71
Meeting Locations	72
Pricing Trends	73
Central and South America	75
Meetings Activity	75
Meetings Budgets & Planning	76
Meeting Locations	78
Pricing Trends	79

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Please note that all information stated within this forecast is based on a survey distributed by American Express Meetings & Events to industry professionals and suppliers during the months of July and August 2015. In some instances, figures from the 2015 forecast have been included for reference only and noted accordingly.

EXECUTIVE SUMMARY

Healthy Growth

Dear Reader,

I am proud to present our fifth annual global meetings and events industry forecast. As I look back over the last five years of this forecast, the meetings industry has transitioned from a state of recovery, to cautious optimism, to experiencing robust and healthy levels of growth around the world. Our industry has made excellent progress over the last five years, and I am excited by what I see in the results of our 2016 Global Meetings Forecast survey. The outlook for growth in all aspects of meetings and events is clear, and the industry experts we interviewed support those findings with their own stories of expansion as well as increased use of various event types, including incentives.

2015 was a strong year for the industry. We experienced increases in room rates and air rates consistent with those predicted in our 2015 Forecast. 2015 also saw a rise in compliance-related concerns. This has driven demand for more detailed compliance and reporting data, and created a deep focus on managing risk of all types across the globe. As I noted last year, I think this focus and rigor contribute to the long-term health of our industry.

In the results of the 2016 survey, for the first time we saw optimistic responses that point to growth across nearly every indicator studied for this forecast. And the positive responses were global, not restricted to one region.

Generally positive economic trends combined with the global expansion of many corporations is driving the need for more training and internal meetings as companies hire new talent and need to train employees in new regions. Training meetings outpace other meeting types in nearly all regions.

As further detailed in the forecast, respondents to our survey are seeing growth in managed travel programs across all regions, with organizations increasingly putting meetings-specific policies in place. The Asia-Pacific region is seeing strong growth in the implementation of such policies, with only 13% surveyed reporting no policies in place compared with 21% in 2015. Approval processes and policies related to the procurement of meetings and events



ISSA JOUANEH Senior Vice President and General Manager, American Express Meetings & Events

goods and services are the leading meetings-specific components indicated by those surveyed.

The need for speed is present as hotels are increasingly at capacity in key cities. Working quickly and far in advance to secure key properties has become a necessity and is predicted to be even more significant in 2016. While new hotel builds are in progress, supply has not yet caught up to demand in many popular cities. This availability challenge is putting more pressure on tight lead times, and is an added incentive for meeting owners to secure approvals in a timely fashion.

This year, we've taken a closer look at three areas of the meetings industry in our special sections: Compliance, Incentives, and Mobile Apps for Events. Each section includes insights on trends and provides suggestions from industry experts.

Compliance is clearly an area impacting the industry. In this section, we explore

three areas of compliance particularlyrelevant for meetings and events:1) payments, expenses and records,2) collecting and handling Personal

Information (PI), and 3) attendee selection.

The special section on compliance explores these areas of risk and provides insight into what meeting owners can do to help execute meetings in a compliant way. We also look at internal controls and risk mitigation strategies that organizations can put in place for meetings and events activity.

We're pleased to have worked with Prevue Magazine to put together the Incentives section, which explores how Millennials (defined as individuals born between 1981 and 2000) are influencing the design and execution of incentive programs today. It seems that most Millennials have a strong and unique point of view on what it means to be rewarded, a view that impacts meeting destinations, activities, giveaways, and corporate social responsibility. Choice

For the first time, we saw optimistic responses that point to growth across nearly every indicator studied for this forecast. And the positive responses were not restricted to one region, but were global. It seems that most Millennials have a strong and unique point of view on what it means to be rewarded, a view that impacts meeting destinations, activities, giveaways, and corporate social responsibility. Choice and personalization are key themes in designing an incentive that inspires and motivates this large segment of the workforce.

and personalization are key themes in designing an incentive that inspires and motivates this segment of the workforce. And it's all about infusing local flavor into the experience to bring the meeting destination to life for this group.

Of course we cannot ignore the impact technology continues to have on the meetings industry. We're seeing increased use of meetings technology of all kinds in our own business and that of our clients. We are highlighting the growing mobile event application segment in our special section on Mobile Apps, looking at how the technology is evolving and how to maximize its use to achieve desired outcomes. including attendee engagement, as well as measuring event effectiveness. In this age of multiple screens, meeting owners have an opportunity to leverage attendees' propensity to multitask to their benefit via mobile apps!

At American Express Meetings & Events, 2015 has been a year of exciting changes and expansion. We are thankful and appreciative of the confidence our clients have shown in our capabilities and are committed to continue to innovate, as well as retain and attract the best talent in the industry.

Looking to 2016, I am inspired by the role meetings are playing in global commerce, helping to drive business results for our customers and impacting the global economy in a very positive way.

Thank you for your interest in the 2016 meetings industry forecast.

Regards,

Issa Jouaneh,

Senior Vice President and General Manager, American Express Meetings & Events



2016 Global Meeting Activity

8 AMERICAN EXPRESS MEETINGS & EVENTS

Meetings Activity & Characteristics

Number of Meetings

Gathering average program numbers. In this year's forecast survey, we asked respondents to provide their predicted number of meetings per meeting type for 2016 within ranges. These results will serve as a baseline for discovering shifts in meeting type activity as we look forward to future years. We have gathered similar predictions for average meeting length, cost per attendee, and lead times. Respondents were also asked whether their responses represent an increase or a decrease compared with their current meetings activity.

A busy year ahead. Overall, survey respondents are most positive in their predictions for increasing activity-related responses across all meeting types. In all regions, over 85% of activity responses indicated either similar activity levels or increased activity. These predictions point to increased momentum as respondents continue to plan for growth at levels we haven't seen in our five years of preparing this forecast.

Focus on employees. Training and internal team meetings emerge as one of the predominant areas for growth over the coming year. As budget contstraints ease, respondents are seeing a resurgence of meetings that bring employees face-to-face and an increased willingness to invest in these efforts. While incentive meetings for employees tend to be lower in number than many other types, they do bring together one of the largest groups of people and are expected to increase in number in most regions.

Regional paths to activity growth. Respondent predictions, although overwhelmingly positive, do vary considerably across regions.

European respondents predict the greatest number of meetings per program at an overall average of 126 total across all meeting types and plan to hold an average of 20.2 conferences/ trade shows next year, eight more than Central and South America, the next closest region.

In contrast, respondents from Asia predict average activity levels of just 68 meetings per program, however they are the most likely to expect growth in their program activity.

North American respondents predict an average of 80 meetings per program next year, 30 of which are either training or internal team meetings.

Central and South American respondents anticipate hosting the second-highest number of meetings at 87 per program but are the most conservative in their estimates for growth relative to other regions surveyed.

Number of Attendees

Getting bigger. Not only are respondents predicting higher activity levels, they are also more likely to predict an increase in their meeting sizes for 2016. On average, no region has more than 10% of respondents predicting a decline in their meeting sizes; the rest predict either similarly sized or larger events. In past years, budget constraints have forced meeting owners to trim their meeting sizes. Going forward, they appear to be focused more on creating the optimal list of attendees and worrying less about the total meeting size.

Large conferences and trade shows. Meeting

▲ Respondents expect increase over previous year

▼ Respondents expect decrease over previous year

Number of Meetings Planned

	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	ASIA
Sales/Marketing	12.2 🔺	20.1 🔺	11.7 🔺	12.3 🔺
Training	15.7 🔺	21.9 🔺	12.1 🔺	10.6 🔺
Internal Team Meeting	14.7 🔺	22.7 🔺	11.0	10.7 🔺
Product Launch (Internal/External)	5.1 🔺	8.3 🔺	11.8 🔺	5.0 🔺
Conferences/Trade shows	10.0 🔺	20.2 🔺	11.8 🔺	8.9 🔺
Senior Leadership Meeting/Board Meeting	8.1 🔺	12.9 🔺	10.9 🔺	6.3 🔺
Advisory Board	7.6 🔺	11.3 🔺	8.1 🔺	7.5 🔺
Incentive/Special events	6.2 🔺	8.2 🔺	9.7 🔺	6.4 🔺

Number of Attendees

	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	ASIA	GLOBAL HOTELIERS
Sales/Marketing	173 🔺	103 🔺	196 🔺	122 🔺	93 🔺
Training	141 🔺	62 🔺	153 🔺	52 🔺	195 🔺
Internal Team Meeting	89 🔺	73 🔺	112 🔺	65 🔺	124 🔺
Product Launch (Internal/External)	198 🔺	171 🔺	250 🔺	85 🔺	195 🔺
Conferences/Trade shows	455 🔺	195 🔺	257 🔺	209 🔺	291 🔺
Senior Leadership Meeting/Board Meeting	62 🔺	37 🔺	61 🔺	38 🔺	59 🔺
Advisory Board	48 🔺	44 🔺	130 🔺	56 🔺	33 🔺
Incentive/Special events	210 🔺	137 🔺	297 🔺	140 🔺	226 🔺

Days per Meeting

	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	ASIA	AVERAGE	
Sales/Marketing	2.4	1.9	2.5	2.2	2.3	
Training	2.5	2.0	2.3	2.1	2.2	
Internal Team Meeting	1.8	1.7	2.3	1.9	1.9	
Product Launch (Internal/External)	2.3	2.0	2.5	1.4	2.1	
Conferences/Trade shows	3.2	2.8	3.3	2.8	3.0	
Senior Leadership Meeting/Board Meeting	2.2	1.8	2.4	2.1	2.1	
Advisory Board	2.0	1.5	2.1	1.9	1.9	
Incentive/Special events	3.2	2.5	3.9	3.3	3.2	

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.) owners appear to favor larger events when they are focused on revenue generation. Conferences and trade shows are predicted to be the largest events in nearly every region, ranging from 209 attendees in Asia to 455 attendees in North America.

Suppliers continue to be bullish. Suppliers predict not only more meetings in 2016, but larger ones as well. They see available space being snapped up further in advance than in past years as demand swells.

Days per Meeting

Staying the same. Meeting length is predicted to remain unchanged across most regions with the global average of 2.3 days per meeting across categories. As in past years, conferences and trade shows, and incentives and special events are significantly longer than other meeting types. Internal team meetings and advisory board meetings are lowest at 1.9 days.

Longer in the south. Central and South American meetings are predicted to be longer than those in other regions on average, led by incentive and special events at 3.9 days, nearly a full day longer than the overall average across regions. Respondents from Europe and Asia predict shorter meetings averaging 2.0 and 2.2 days overall respectively.

Budgets & Planning

Overall Meeting Spend within Organizations

A rising tide. In a first since our initial forecast in 2012, survey respondents across all regions are predicting increases in their overall program

budgets, and in larger increments than we've seen previously. While these predicted average increases are not large, the combination of their size compared with past years and the consistency across regions is a welcome sign for the industry. It may also represent an increasing vote of confidence from the C-suite regarding the value of meetings and events to organizations.

North American respondents see an average jump of 1.9% in spending compared with a predicted increase of just 0.3% in 2015. European and Asian-based respondents see a reversal from minor declines in predicted spending for 2015 to expected increases of 1.8% and 2.1% respectively. Central and South American respondents predicted the smallest change from 0.9% in 2015 to an anticipated 1.4% in spending.

Is it enough? Given the optimism for more meeting activity and larger events in 2016, combined with an expected rise in group hotel rates (see Group Hotel Rates below), these anticipated budget increases may be insufficient. Meeting owners may find they need to either temper their activity plans, or alter their cost per attendee plans, in order to stay within the planned budget increases.

Cost Per Attendee

Spending a little more on people. Rather than ask respondents to provide predictions on their individual meeting budgets as we've done in past forecasts, this year we asked them to indicate their average expected cost per attendee (less air costs) for 2016 and whether they see it increasing or decreasing.

Not surprisingly, anticipated costs per attendee tend to be lower for internal team and training

Overall Meeting Spend within Organizations



(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Lead Times (weeks)

North America	18
Europe	7 🔻
Central/South America	6 🔺
Asia	8 🔺
Global Hotelier	4 🔻

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Cost Per Attendee (excluding air costs)

			EUROPI	E	CENTRAL/ S. AMERICA	ASIA	GLOBAL HOTELIERS	
Sales/Marketing	\$476		\$337		\$594 🔺	\$406 🔺	\$325 🔺	
Training	\$425		\$326		\$480 🔺	\$311 🔺	\$400 🔺	
Internal Team Meeting	\$273		\$320		\$480 🔺	\$232 🔺	\$300 🔺	
Product Launch (Internal/External)	\$419		\$401		\$687 🔺	\$358 🔺	\$486 🔺	
Conferences/Trade shows	\$609		\$551		\$778 🔺	\$459 🔺	\$700 🔺	
Senior Leadership Meeting/Board Meeting	\$510		\$432		\$671 🔺	\$590 🔺	\$350 🔺	
Advisory Board	\$489		\$323		\$644 🔺	\$443 🔺	\$256 🔺	
Incentive/Special events	\$711		\$551		\$911 🔺	\$661 🔺	\$581 🔺	

(Sources: North American, European, Asia-Pacific, Central/South American and Ke Supplier Surveys from American Express Meetings & Events, August 2015.)



Group Hotel Rates

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015 and September 2014.) meetings and highest for incentive meetings and special events. Respondents from Europe and Asia-Pacific (APAC) are more likely to predict a lower cost per attendee for most event types than their counterparts in North America. Central and South America cost predictions are the highest for all meeting types.

In all regions, cost per attendee increases are expected in 2016, for all meeting types, although there is some variability amongst the predictions. In North, Central and South America and Europe, the percentage of respondents predicting increases for cost per attendee is highest for conferences/trade shows and incentives/special events meeting categories. Asia-Pacific respondents are most likely to indicate an increase in spending for incentives and special events as well as senior leadership/board meetings.

Lead Times

Lead times can't get smaller. As in previous forecast years, respondents and meetings experts report short lead times, but in 2016 some lengthening is predicted for Central/South America and Asia. Lead times are predicted to be between six and eight weeks for most regions while respondents predict 18 weeks for North American meetings. This response could be partly due to the larger meetings that require some of the longest lead times, such as conferences and trade shows, being held in North America.

Even if lead times are not necessarily getting shorter, they remain an issue for meeting planning as contracting becomes more involved. According to one expert in the Asia-Pacific region, "For a fully executed contract, it takes longer because both the hotel and the meeting owner have to review a larger number of clauses and that simply takes time." Another industry expert suggests that, "Shorter lead time leads to an increased risk of higher air and hotel rates as availability becomes a greater challenge," which can result in an unexpected increase in the meeting budget.

Group Hotel Rates

Rates rising with demand. Respondents expect average group hotel rates to rise between 1.5% and 4.2% globally, while global hoteliers are predicting a 2.9% increase across all regions. These predictions are relatively similar to those of 2015, with North American respondents again anticipating the highest rise of any region.

Experts and hotel suppliers interviewed are also in agreement that average group rates will rise slightly in 2016. Milton Rivera, Vice President, Global Business Development at American Express Meetings & Events, notes, "The prevailing expectation is that negotiations will be tougher because hotels will have the upper hand. Availability is tighter now, which gives them more leverage to push for higher rates."

Starting the planning process early and allowing for flexibility in terms of dates and days of the week for an event may help owners and planners mitigate some of the expected increases.

Direct access. A relatively recent trend some experts point to is that of individualized distribution channels, where the hotel supplier or a consolidator provides online access to meetings-related availability and reservation capabilities, a long-standing desire of meeting owners and third-party meetings management companies. One German meetings expert explains, "I don't see major increases in 2016, but as we look ahead, online distribution channels are likely to continue to increase."

Global Meeting Property Demand & Supply

Property Type Demand

The trend continues. Respondents continue to see the demand for mid-tier properties increasing into 2016. Decreasing interest in luxury and resort hotels remains similar to 2015 predictions as well, although Central and South America stands out with a very slight 0.8% predicted increase in resort properties.

For the fourth year in the row, our survey respondents indicate interest in mid-tier properties will rise. Meeting owners will likely face increased competition for hotel rooms from not only other meetings, but from increasing numbers of transient business and leisure travelers as well. **Searching for something different.** All experts agree that there is a growing interest across regions in unique hotels that can offer a new experience to attendees. In response, "Bigger hotel brands are creating new brands to address the desire for individuality," comments one hotel construction expert.

This demand is also reflected in predictions of rising interest in non-traditional meetings facilities, a trend continuing from previous years.

Group Hotel Space Availability

Fewer rooms. Respondents predict a decline across most regions in group hotel space availability by at least 0.9%. North American respondents predict a decrease of 2.6% in 2016 and a further decrease of 2.7% in 2017. European respondent predictions are relatively flat.

SURVEY RESULTS

Property Type Demand

	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	ASIA	GLOBAL HOTELIERS
Resort Properties	-0.5%	-2.4%	0.8%	-2.7%	3.0%
Luxury Properties	-0.9%	-2.8%	-3.0%	-2.8%	3.0%
Mid-Tier Properties	1.2%	1.8%	0.5%	2.1%	5.0%
Lower-Tier Properties	-1.5%	0.2%	-1.5%	0.3%	0.0%
Non-Traditional Meetings facilities	1.3%	2.5%	1.1%	1.5%	4.0%

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Group Hotel Space Availability

	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	ASIA	GLOBAL HOTELIERS
2016	-2.6%	0.1%	-1.1%	-0.9%	0.5%
2017	-2.7%	0.7%	-0.6%	0.1%	0.5%

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.) Interestingly, global hoteliers are predicting an increase in availability, possibly as meeting planners are focused on specific locations and times of year, whereas global hoteliers are thinking of overall availability.

2016 Hotel Openings & Construction by Region

Fewer openings globally. A review of the data regarding the ratio of midscale to luxury hotel openings and construction from 2014 to 2016, compiled by TOPHOTELPROJECTS GmbH, shows the number of new hotels opening in 2016 will decline in most regions. Europe will see the greatest decline, just 404 new hotels next year compared with 587 in 2015.

Conversely, North and Central America will witness a significant jump in hotel openings with

731 new properties becoming available in 2016. After many years of under-development in North America, the increased construction activity witnessed last year is translating into new supply for meeting planners.

But not for long. With the exception of Europe, all regions are seeing an increase in hotels under construction. Asia-Pacific is seeing a jump of 384 additional hotels under construction from 2015 numbers. Even more notable is the more than doubling of hotels under construction in North and Central America to 1,399 hotels. In the coming years, these new properties will offer more choice for meeting planners and owners, and hopefully alleviate some of the occupancy challenges currently being faced.

Too much in the Middle East? Rolf Schmidt, Managing Director of TOPHOTELPROJECTS GmbH, indicates that there is an excess of



(Source: TOPHOTELPROJECTS GmbH, as of August 2015)

Hotel Openings (Midscale to Luxury Segments) 2014–2016

016 GLOBAL MEETINGS AND EVENTS FORECAST 15

investment money for hotel development globally but nowhere more so than in the Middle East. "We're seeing one to two new projects per day appearing that are focused in the Middle East." Mr. Schmidt believes the key driver is a desire to create new business hubs for travel, finance, and meetings and events in the region, as a means to diversify these economies and reduce their dependence on oil and gas revenues.

Indonesia rising. In Asia-Pacific, Indonesia stands out, with more than 120 hotels now under construction. The government has chosen to focus on increasing tourism to help drive their economy and is encouraging hotel investment in both new and existing destinations.

More room in Mexico. Similarly, according to Rolf Schmidt, "The Mexican government plans

to double its 2013 hotel capacity by 2030," although he believes concerns around the political situation as well as safety and security issues may impede the achievement of this goal.

Moving Upscale. In Europe and North America, midscale properties continue to be the predominant type of hotel being opened, but luxury properties have closed the gap considerably. In 2016, a new luxury property will open in Europe for every 2.15 midscale properties opened, compared with one for every 3.59 in 2015.

In North and Central America, the change is even greater. New midscale properties outnumbered new luxury ones by almost 5 to 1 in 2015. Next year, that ratio will decline by almost half, according to the data provided. While meetings and events demand continues to be focused on



4 & 5 Star Hotels Under Construction 2014–2016

16 AMERICAN EXPRESS MEETINGS & EVENTS

the mid-tier, increasing tourism and a rebounding economy are likely driving this trend towards higher-end hotel construction.

Shifting leaders, fewer openings. Openings in top cities will decline for the most part in 2016 as construction activity is more widespread and the top four cities have changed slightly from previous years. While London, Dubai, New York and Riyadh have consistently led, Miami has now moved to the top four with a jump in hotel openings from 11 in 2015 to 20 in 2016. New York now leads globally with 26 for 2016, but this marks a drop from its 31 openings in 2015. Most markedly, London has dropped from its 38 in 2015 to 19 in 2016. This halving of its dominance reflects the possible saturation of this city and the high cost of this destination.

Top Cities for Hotel Openings 2016

New York	26
Dubai	25
Miami	20
London	19
Riyadh	17
Doha	15
Shanghai	14
Houston	13
Chongqing	12
Frankfurt	11



016 GLOBAL MEETINGS AND EVENTS FORECAST 17

2016 Hotel Openings: Top 3 Cities per Region



	CITY	HOTELS		CITY	HOTELS
	New York	26		Dubai	25
NORTH AMERICA	Miami	20	MIDDLE EAST	Riyadh	17
	Houston	13		Doha	15
	London	19		Shanghai	14
EUROPE	Frankfurt	11	ASIA	Chongqing	12
	Hamburg	10		Bali	10
			'		
	Rio de Janeiro	o 6		Cairo	7
SOUTH AMERICA	Cartagena	4	AFRICA	Marrakech	5
	Sao Paulo	4		Algiers	5

(Source: TOPHOTELPROJECTS GmbH, as of August 2015)

Global Group Air Trends

Group Air Rates

Continuing to rise. The results of our group air survey suggest modest overall group air rate increases anticipated at 1.9% in 2016 and 2.7% in 2017.

Regional Group Air Rates

Rates on the rise. Intra-regional air rates are predicted to rise in all regions next year. In North America, respondents see similar increases of 5.5% compared with 5.0% in 2015.

European regional predictions are significantly higher in 2016 at 5.5% for Western Europe and 8.0% for Eastern Europe. Asia-Pacific, Central and South American regional predictions have also risen from a prediction of less than 2% in 2015 to 5.5% for next year.

Airline Capacity & Group Volume

More and more seats. Group air survey respondents point to continued increases in both airline capacity and volume across all regions. North, Central and South America are expected to see the highest increases in both capacity and volume ranging from 4% to 5.5%. In other regions, increases are limited to 1.5% to 3.0%.

Shifting destinations. Airlines appear to be helping meeting owners and planners who are looking for unique destinations for their events. Stefano Mastrantonio, National Manager, Group Sales, for Air Canada explains that, "Airlines now have the opportunity to target new routes and destinations in their expansion efforts and offer those routes to meeting planners." This increased ability to reach new destinations should open up new opportunities for meeting planners in 2016 and beyond.

Inclusion of Group Air Management

Varies around the globe. This year's survey results suggest that the integration of air travel into meetings planning continues to vary across organizations and regions.

Central and South American respondents have the highest predictions, with nearly 40% expecting to include attendee air management for more than half of their meetings. Other regions have predictions between 27% and 28% of meetings incorporating attendee air management, indicating there is still much room for further integration. As companies pay closer attention to meeting policies and have a heightened awareness of compliance and duty of care, group air may become an increasingly important

SURVEY RESULTS

Group Air Rates	
2016	2017
+1.9%	+2.7%

Regional Group Air Rates

REGION	INCREASE
Within North America	5.5%
Within Eastern Europe	8.0%
Within Western Europe	5.5%
Within Asia-Pacific	2.5%
Within Central America	5.5%
Within South America	5.5%
Within Middle East	3.0%
Within Africa	3.0%
International (across continents)	0.0%

(Source: American Express Meetings & Events Group Air Expert Survey, August 2015) element in the meeting management process. For more details, see the special section on compliance included in this forecast.

Challenge of dispersed attendees. As companies are becoming more virtual, their employees can often be spread across great geographical distances, which can present additional challenges for securing group air rates. One meeting planner explains that, "Whereas in the past, a company might have a large group traveling from one origin to a destination, we now see lots of people originating from many different airports. You might be flying 50 or more people from the East Coast to the West Coast but they are all essentially coming from different places so the typical group rate isn't available."

Analysis continues to be important. As a result, organizations continue to look very carefully at the cost of travel as a key factor when selecting a meeting destination. One North American air expert explains that a good analysis

can help an organization identify the most cost-effective destination from a travel perspective, based on the location of attendees that are scattered geographically.

Kaaren Hamilton, Vice President of Global Sales for Carlson Rezidor Hotel Group, has noted that while she is not seeing a trend towards specific locations, "Customers are looking very carefully at the cost of travel, which can influence their ultimate destination choice."

Group Air Booking Process

Internal air management leads. According to survey respondents, 32% of companies primarily use internal group air specialists for contracting their air travel but there is no overwhelming consensus. Twenty-one per cent of respondents most often book directly with the airline. Many companies also look for external expertise, with 23% booking through a travel management



2016 Airline Capacity and Volume

SURVEY RESULTS

20 AMERICAN EXPRESS MEETINGS & EVENTS

company and 9% with a meetings management supplier. With growing needs around compliance and duty of care, organizations would do well to evaluate how they are managing this function to ensure they are meeting organizational requirements.

Types of Group Air Contracts

Flat rates preferred. Respondents find that airlines are most likely to prefer negotiating a flat rate from one destination, rising to 50% from 45% last year. Their inclination to negotiate a combination of a flat rate and mini route deals/ conference window rates has declined significantly to 24% from 41% in last year's forecast.

Combining meeting with transient. Norma Dean, Director Specialty Sales for Delta Air Lines, points out a new initiative to incorporate their clients' meeting contract needs into their overall transient travel contracts, in order to gain a full

SURVEY RESULTS

Types of Deals Airlines Prefer to Negotiate

Both flat rate from one destination and mini routes deals/conference window rates	24%
Flat rate from one destination	50%
Mini route deals/conference window rates	16%
Other	11%

(Source: American Express Meetings & Events Group Air Expert Survey, August 2015)

360-degree view of their air spend and their travel needs. She explains that, "We see customers wanting reporting and reconciliation of all travel costs, i.e. transient and meetings. So that means meeting travel needs to be as easy to plan and price as regular business travel, and Delta's vision is to offer the individual corporate traveler the full scope of benefits in the suite of Delta Edge services on travel for either transient or meetings

SURVEY RESULTS



Percentage of Meetings that Include Group Air Management

(Source: American Express Meetings & Events Group Air Expert Survey, August 2015)

Group Air Booking Resources Used Most Frequently

Internal group air specialist	36%
Travel Management Company	26%
Direct arrangements with airline	
Meetings management supplier	10%
Other	5%

(Sources: North American, European, Asia-Pacific, Central/ South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Terms Airlines are Open to Negotiate in Contract

Cancellation Fees	37%
Change Fees	51%
Attrition Penalties	44%
Concession Tickets	35%
Name Changes	81%
Ticketing Deadlines	54%
Deviations	50%
Complimentary Lounge Access	54%
Carbon Emissions Offsets	40%
Complimentary Wi-Fi Where Available	50%

(Source: American Express Meetings & Events Group Air Expert Survey, August 2015) purposes. As the needs and demands of Strategic Meetings Management evolve, Delta will continue to invest in our meetings products to better serve our partners and travelers."

Group Air Contract Elements

Room to move. To accommodate group bookings, respondents have found that airlines are willing to negotiate in several areas. In fact, 81% of air experts believe that airlines are willing to negotiate on passenger name changes, while more than 50% feel they are willing to negotiate on change fees, ticketing deadlines, deviations, complimentary lounge access and Wi-Fi. Only 35% believe airlines are willing to negotiate on concession tickets and on cancellation fees that number was 37%. Meeting planners suggest that while many of these are important items of negotiation for customers, "complimentary lounge access, for example, becomes less important to a company than cancellation fees, as their travelers may only have 15 minutes in the lounge, by the time they get through security at the airport." On the other hand, Stefano Mastrantonio of Air Canada suggests that customers are becoming more interested in the overall value delivered than the actual air rate. He explains, "If you have an incentive group, you likely want it to be a seamless experience for them with checked bags and meals already covered for their flights."

Groups are important to airlines. As with hotels, group bookings are important in providing a key segment of demand for air suppliers. Stefano Mastrantonio of Air Canada explains that, "We build our base with groups and, fortunately, during tough times, group volume was surprisingly steady. We are now introducing a lot of new and interesting destinations and want to let our partners know they exist."

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Global Trends

Meetings Program & Policy Trends

Meetings Management Trends

A need to move quickly. A predominant trend across regions is an increase in pace. As more meetings are planned, locations fill up quickly and compliance and risk issues rise in importance, the scope of meeting planning activities has grown but the time allowed to complete them has not. As a result, meeting planners and owners must be much more proactive. One expert explains, "Businesses needs to be thinking strategically much further in advance then they have been. One organization, for example, has a global conference of 5,000 employees and we're already negotiating contracts for 2020 in order to secure the properties they want. When you're talking about large spaces where more than one hotel will be required, it is critical to move quickly."

Top Meeting Location Concerns

Budget drives location. Respondents across all regions identify budget as the key consideration in choosing a meeting location. Ultimately, regardless of the intent of the meeting, the choice of venue will nearly always be influenced by budget. Companies will determine what they are willing and able to invest in each event, with costs for accommodation often consuming a significant portion of that investment, and location heavily influencing transportation costs as well.

While budget drives location choice, one-fifth of respondents from North America and Europe identify the type of location required as a priority. Type of location could include its proximity to a training facility or an airport. This element is ranked as less important in Asia and Central and South America. Ease of transportation to the location is also a priority across regions as it can impact both attendee time requirements and travel costs.

Economic and political instability. For 14% of respondents from Asia, safety is an important consideration and for 16% economic and political instability is also a key concern. While experts refer to these as important across all regions, economic and political shifts in Asia may be driving the higher level of concern in the region.

The influence of managed programs. Managed travel programs appear to quickly becoming the norm across all regions. "The number of organizations that are implementing managed meetings programs and looking to our company to be a preferred supplier is increasing" says Kaaren Hamilton of Carlson Rezidor Hotel Group. The growth of managed programs is driving new attention to all aspects of meeting planning so that location and accommodation remain high priorities but are among a range of considerations in the hotel sourcing process.

Policy Status & Components

Driven by compliance. The implementation of formal meetings policies continues to grow within and across regions. "Overall meeting management is on the rise and growing in terms of priority and companies are struggling with how to address the need for meeting policy and driving adoption," according to a meetings expert from North America. Asia continues to see remarkable growth in this area with only 13% of organizations reporting no formal policy compared with 21% in our 2015 Forecast. While 68% of North America-based respondents state that policies are in place for some or all of the

Top Factors Influencing Meeting Location

	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	APAC	GLOBAL HOTELIERS
Economic/political instability concerns	2%	4%	8%	16%	13%
Currency/exchange rate	1%	1%	10%	4%	6%
Online reviews	1%	0%	4%	1%	6%
Safety concerns	2%	3%	4%	14%	13%
Perceptions around "resort" destinations for meetings	5%	4%	8%	4%	0%
Participation in company's or organization's preferred supplier program	5%	8%	0%	9%	6%
Past experience of colleague	1%	2%	0%	5%	0%
Your own past experience	0%	0%	0%	0%	0%
Ease of air lift/transportation to location for attendees	18%	14%	20%	7%	6%
Budget	28%	24%	32%	23%	38%
Client directive based on past experience	10%	10%	6%	7%	0%
Repeat destination for meeting	7%	8%	4%	1%	6%
Specific location type needed – airport, near training facility, near customer location, etc.	19%	22%	4%	9%	6%

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

organization, 25% still state that there are no formal policies at the organizational level. More than 70% of Europe-based respondents indicate that formal policies are in place for entire organizations, while 18% suggest that there is some formal policy. Similarly, Milton Rivera of America Express Meetings & Events sums up the current meetings policy shift by suggesting that, "The torch at the front of the initiative is compliance." Another meetings expert in Asia indicates that, "Companies are looking at developing more robust policies and those companies that had a meetings policy last year are working on making it more effective this year."

Compliance leads to consolidation of meeting planning within an organization to provide

greater transparency of meeting processes and to ensure fit with policy.

Policies cover a range of components. Meetings policies cover a range of issues including expansion, safety, payment and approval processes. Meetings policies in Asia appear to cover a wider breadth of components, with at least a third reporting the inclusion of all surveyed components. Policies that relate to meetings/events payment tools are important across all regions as are the procurement of meetings and goods and services policies for those meetings. While 38% of organizations in Asia include Return on Investment ("ROI") metrics in their meetings policies, this component is included in less than one fifth of organization policies in other regions.

Formal Meetings Policy Status

Formal policy is in place for the entire organization

Policies are in place for some parts of the organization (e.g. not all departments, geographies)

Formal policy is in development

No formal policy exists



(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Components Included in Organizational Meetings Policies

ТҮРЕ	NORTH AMERICA	EUROPE	CENTRAL/ SOUTH AMERICA	APAC
Meetings ROI metrics	14%	18%	15%	38%
Global expansion/standardization of meetings and events program	23%	29%	18%	45%
Implementation of meeting planning technology	27%	27%	21%	52%
Meetings/events payments tools	42%	40%	38%	50%
Social Media	20%	11%	21%	29%
Payment methods and processes associated with meeting/events goods and services	50%	51%	44%	57%
Procurement of meetings/events goods and services	51%	51%	29%	64%
Safety and security	31%	43%	41%	36%
Use of 3rd party meeting planners	32%	24%	35%	33%
Use of preferred hotel / air / transportation suppliers	39%	69%	53%	60%
Approval Process	58%	55%	44%	60%

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Meetings ROI Metrics

ROI matters more. While still relatively small compared with other policy components, the percentage of respondents reporting explicit language around the expanded use of ROI metrics continues to rise from 2015 in all regions. The most dramatic shifts are seen in Asia where the ROI component has risen from 20% inclusion noted in our 2015 Forecast to 38%, and Central and South America where it has risen from 5% inclusion in 2015 to 15% in 2016. More and more companies are wanting to see the return on investment for meetings measured in some way. However, there still does not appear to be one consistent way meetings are measured.

Global Expansion and Standardization

Standardization is stable. The number of respondents incorporating globalization/standardization content in their meetings policies is relatively similar in both North America and Europe at 23% and 29%, respectively. Central South America-based respondents report a lower number at 18%, and in Asia, respondents see a big rise to 45% from 26% in the 2015 Forecast.

The changing work of the meeting planner.

As the work required of the meeting planner broadens in scope to include data tracking and analysis provision as well as effective meeting delivery, the job of the meeting planner becomes more complex. "We need to be very organized and very data savvy to manage the client activity and expectations. The job is becoming more intense at the local level requiring a shift in skill set," explains one meetings expert.

Meeting Planning Technology

More questions. Respondents report that the inclusion of policies regarding the use of meeting planning technology ranges from 18% to 29%, with the exception of Asia, where it has nearly doubled to 45% since last year's forecast.

Milton Rivera of American Express Meetings & Events sees the need for a concerted strategy to make the most of the ever-changing meeting technology landscape. He explains that, "While the features available through meetings technology keep increasing, customers often struggle with knowing which feature is applicable. The company that has a well-thought-out strategy and understands its requirements will be better able to take advantage of the solutions that are available."

Another meeting professional suggests that the uptake of technology will increase as those with more skills move up through the meeting planning process. "Right now, technology is often seen as very complex but as the younger generation takes hold in the industry this will likely change quite quickly, given their near constant exposure to, and experience with, technology."

Social Media

The rise of social media. While the inclusion of social media language in meeting policy remains at 11% in Europe, it has risen to 20% across other regions and 29% in Asia. Meeting owners and planners are beginning to look more and more to the potential utility of social media tools in the meeting process, and the potential risks.

Multitasking. Planners reinforce the importance of ensuring that the event app doesn't take away from the meeting. However, Yma Sherry, Vice President American Express Meetings & Events explains, "While it used to be insulting to the presenter for audience members to be on a device during the presentation, now it is expected. But we have to make sure the technology is contributing to the meeting, whether the attendee is communicating with others who are connected in some way to the meeting, or enabling the meeting owner to more closely monitor the activity of the attendee."

Payment & Procurement

Pay policies a priority. Survey results indicate that payment and procurement components continue to be present in a large percentage of meeting policies globally. Language regarding meetings and payments tools are incorporated into 44% to 57% of meetings policies, depending on the region with Central and South American-based respondents reporting the highest percentage. This is up slightly from last year for most regions with Central and South America remaining stable.

Streamlining. In North America, respondents cite reconciliation as a top payment challenge, while card acceptance appears to be a greater

challenge in Central and South America.

One meetings expert states that, "Companies are definitely interested in a payment process that is much more streamlined in terms of a reconciliation point of view. Generally, a card solution or virtual payment process removes the time lag enabling tighter reconciliation." Payment cards provide companies with the capacity to consolidate payments in one place.

Use of Third-Party Meeting Planners

Outsourcing the team. "We are increasingly seeing the outsourcing of meeting management and planning where companies keep one account manager in a leadership role, but the meeting planning team is being outsourced," explains one meetings expert.

Leveraging outside expertise. Policy language specifying the use of third-party meeting planners is similar across regions with the highest in Central and South America at 35% and the lowest in Europe with 24%. As discussed earlier, the trend towards consolidation continues and

SURVEY RESULTS

	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	APAC
Acceptance of Desired Payment Type	11%	17%	12%	24%
Card Acceptance	10%	20%	38%	13%
Currency Exchange Fees on Card	6%	9%	10%	13%
Fee Charged for Utilizing the Card	13%	13%	17%	15%
Managing Pre-payment	25%	23%	15%	18%
Reconciling Final Bill to Estimate	35%	17%	8%	16%

Top Meeting Payment Challenges

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.) experts suggest that outsourcing to a single source for meeting planning can in many cases ease the compliance process and allow for greater accuracy of financial tracking.

Meeting Approval

Approval processes predominate. Language regarding the approval process predominates in meeting planning policies with the highest in Asia at 60% and the lowest in Central and South America at 48%. All regions report that their easiest meetings approval processes are for training meetings, which aligns with the rise in training meetings noted earlier. In North America, respondents also report senior leadership meetings being one of the easiest types to approve while Europe identifies internal team meetings that way. Interestingly, Asian-based respondents are split when it comes to sales and marketing meetings with respondents reporting them to be either the easiest or the most difficult to approve. This points to organizations having very different perspectives regarding this meeting type.

Incentives and special events are reported by most regions as the most difficult approvals and can be complex with the growing demand for unique destinations and the large number of attendees. Respondents also report conferences/trade shows and product launches can be difficult approvals, likely due to the costs associated with these large, complex event types.

Increasingly complicated. Experts agree that the meetings approval process has grown more complicated and often reduces lead time even further as more approvals are required to address new compliance processes. One meetings expert in Belgium explains that, "Compliance is driving tighter policies and stricter adherence to them." At the same time, companies are looking for support in policy development. Planning experts indicate that they are increasingly asked by clients for guidance with meetings policy development.

SURVEY RESULTS

Easiest Meetings Approval Process

NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	APAC
Training	Internal Team Meeting	Sales/Marketing	Sales/ Marketing
Senior Leadership Meeting/ Board Meeting	Training	Training	Training

Most Difficult Meetings Approval Process

NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	APAC
Conferences/Trade shows	Incentive/ Special Events	Incentive/Special Events	Sales/Marketing
Internal Team Meeting	Product Launch (Internal/External)	Product Launch (Internal/External)	Incentive/ Special Events

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Virtual & Hybrid Meetings

Struggling to adopt. While experts suggest that people are becoming better equipped to manage or attend virtual and hybrid meetings, their usage does not appear to be increasing. One quarter or fewer of respondents report using virtual or hybrid solutions in more than 10% of their meetings. Experts and suppliers alike continue to say that face-to-face is the preferred meeting type.

Cost considerations. Cost savings continues to be the more compelling reason for using these solutions, although respondents do see

value in reducing travel time and reaching a broader audience.

Lack of direction. Most organizations do not appear to have a clearly defined virtual policy or strategy for deploying virtual and hybrid solutions, with respondents in Asia leading at 35% reporting a strategy is in place. "Many companies are still struggling with the right way to effectively use these technologies," says one North American-based meetings expert.

As noted in past forecasts, a well-defined strategy and policy can help companies to identify when best to leverage virtual and hybrid

SURVEY RESULTS

Virtual/Hybrid Usage 2013–2015 (More than 10% of meetings)



(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Most Compelling Reason to Use Virtual/Hybrid Solution

REASON	NORTH AMERICA	EUROPE	CENTRAL/SOUTH AMERICA	APAC
Ability to reach a broader audience	27%	27%	29%	25%
Ability to re-purpose meeting content for multiple uses	14%	8%	10%	13%
Cost savings	27%	30%	29%	28%
Improve the overall effectiveness of the meeting	6%	9%	4%	9%
Reduce travel and time out of office	27%	26%	27%	24%

Clearly Defined Virtual Policy

ANSWER	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	APAC
Yes	13%	13%	27%	29%
No	52%	25%	23%	29%
l Don't Know	35%	63%	50%	41%

Clearly Defined Virtual Strategy

ANSWER	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	APAC
Yes	13%	10%	23%	35%
No	51%	24%	15%	38%
I Don't Know	36%	66%	62%	38%

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

solutions, and determine which technologies can best serve their needs.

Mobile Apps

Increased uptake. Mobile apps are becoming increasingly common and effective across meeting types and regions. Usage among Central and South America-based respondents is highest with more than half of all respondents using mobile apps in more than 10% of their meetings. Significant growth in mobile app usage is also anticipated for all regions in 2016. A meeting expert we interviewed noted, "We are definitely seeing a maturing with increased uptake of social media apps and the changing shape of meetings. Clients want to be flexible so it comes down to how the app will contribute to the meeting."

Sorting through the options. Experts suggest that while the use of and interest in mobile

apps is rising rapidly there is often limited understanding within organizations regarding how best to take advantage of them. There are numerous meeting app solutions available, so it can be a challenge for an organization to identify the best one for their event. According to one meeting expert in North America, "There is a role for the meeting planner to play, to help companies find the right solution and ensure it's compliant with their policies."

Enhanced communication. Respondents across regions rate improving communications as the compelling reason to use mobile apps. Improving the engagement of attendees was also rated highly in all regions. Experts suggest that mobile apps enable quick connections to attendees and an increased capacity to adjust meetings as they are unfolding.

Measuring effectiveness. The least compelling reason, according to survey respondents, is to measure the effectiveness of presentations. However experts see that as a key advantage of mobile apps that will be further exploited as the capabilities are better understood.

"There is an interest in how attendees can be guided through an agenda but not really in

Mobile App Usage 2015–2016 (More than 10% of meetings)



⁽Sources: North American, European, Asia-Pacific, Central/ South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Most Compelling Reason to Use Mobile App

	NORTH AMERICA	EUROPE	CENTRAL/ S. AMERICA	APAC
Improve communications	27%	25%	37%	21%
Improve engagement of attendees	29%	25%	19%	28%
Facilitate networking among attendees	7%	12%	21%	11%
Measure effectiveness of presentations	3%	4%	4%	2%
Measure event effectiveness overall	8%	14%	8%	13%
Communicate with attendees regarding changes or emergencies	15%	10%	6%	18%
Deliver documents electronically	10%	10%	6%	6%

For more insight into the value of mobile apps for meetings, please see the special section on page 46

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

generating data or reacting within a meeting based on feedback. There can be a lot of added value with the ability to react quickly but we're not seeing that yet," explains a meetings expert.

Emerging Regions

Meetings Management Activity

Room for improvement in China. The degree to which organizations are actively managing their meetings programs in these emerging countries remains relatively low according to respondents. Asia stands out with the largest number of respondents actively managing programs across the emerging countries and a full 67% managing their programs in China.

Meeting planning in China does bring challenges in terms of learning a new cultural and business landscape for owners and planners from outside the region. One meetings expert explains that, "While China is a world leader, there has historically been a limited understanding of it related to meetings and events. The ability to get a framework in place in China is getting better however as more companies are working to formalize their programs within the country."

Areas of Focus

Focus on... As with previous forecasts, responses regarding areas of focus appear to be influenced predominantly by the respondent's location. North American-based meeting professionals continue to focus primarily on overall program management across emerging regions, whereas Asia-Pacific-based professionals are increasingly considering transparency in China, Brazil and Russia, as well as securing preferred suppliers in Brazil. Respondents from Europe are interested in gaining transparency into their spending in Russia and South Africa as well as finding appropriate destinations and securing preferred supplier agreements in other emerging countries. In Central and South America, many respondents are not yet working in emerging markets. The limited responses received indicated primary interest in identifying appropriate destinations and ensuring transparency in Brazil while they look for overall meeting management and destination management support in South Africa.

SURVEY RESULTS

Actively Managing Meetings

REGION	NORTH AMERICA	EUROPE	CENTRAL/ SOUTH AMERICA	APAC
Brazil	10%	3%	15%	10%
Russia	2%	4%	0%	12%
India	9%	3%	0%	14%
China	13%	7%	3%	67%
South Africa	6%	5%	0%	10%
None of the Above	73%	75%	62%	29%

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

Greatest Area of Focus by Region

AREA OF FOCUS	BRAZIL	RUSSIA	INDIA	CHINA	S. AFRICA
Gaining transparency into all meeting & events associated expenses	32%	13%	14%	16%	22%
Adherence to meetings program	12%	7%	5%	6%	6%
Identifying appropriate destinations	12%	13%	14%	19%	28%
Securing preferred supplier agreements	8%	13%	23%	13%	6%
Complying with company expense and supplier policies	8%	13%	5%	22%	11%
Destination management support	4%	7%	14%	0%	11%
Overall program management in country	20%	20%	23%	22%	17%
Complying with local privacy laws	4%	13%	5%	3%	0%

NORTH AMERICA

	AREA OF FOCUS	BRAZIL	RUSSIA	INDIA	CHINA	S. AFRICA
	Gaining transparency into all meeting & events associated expenses	0%	50%	0%	14%	40%
	Adherence to meetings program	0%	0%	0%	0%	0%
EUROPE	Identifying appropriate destination	50%	0%	50%	14%	20%
EUROPE	Securing preferred supplier agreements	0%	0%	50%	3%	0%
	Complying with company expense and supplier policies	0%	0%	0%	0%	0%
	Destination management support	50%	0%	0%	14%	0%
	Overall program management in country	0%	25%	0%	14%	40%
	Complying with local privacy laws	0%	25%	0%	0%	0%

	AREA OF FOCUS	BRAZIL	RUSSIA	INDIA	CHINA	S. AFRICA
IA	Gaining Transparency Into All Meeting & Events Associated Expenses	23%	29%	17%	45%	31%
	Adherence to Meetings Program	0%	7%	6%	3%	0%
	Identifying Appropriate Destinations	15%	14%	11%	17%	23%
	Securing Preferred Supplier Agreements	31%	14%	17%	7%	15%
	Complying with Company Expense and Supplier Policies	8%	7%	17%	7%	0%
	Destination Management Support	15%	14%	22%	14%	15%
	Overall Program Management in Country	8%	7%	11%	3%	8%
	Complying with Local Privacy Laws	0%	7%	0%	3%	8%

(Sources: North American, European, Asia-Pacific, Central/South American and Key Supplier Surveys from American Express Meetings & Events, August 2015.)

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SPECIAL SECTIONS

Incentive Travel For A New Generation

PAGE 38

Interact, Learn and Measure with Mobile Apps

PAGE 46

Global Compliance Outlook PAGE 53

Incentives: Reward. Recognize. ENGAGE.

The latest trends in incentives and the generational trendsetters.

Barbara Scofidio, Editor, Prevue Magazine www.prevuemeetings.com and American Express Meetings & Events

The promise of a vacation and some on-trend gifts is not enough to inspire Millennials to do their best in the workplace. A local. immersive experience is what this growing population is looking for.

With all the buzz about how Millennials are changing the workplace and shifting planners' meeting strategies, it should come as no surprise that this generation – defined globally as individuals born between 1981 and 2000¹ – is perhaps the most influential force in the incentive travel space today. Millennials are taking their turn in the driver's seat and rewriting the formula for a successful incentive program.

Prevue magazine recently completed a joint research study² with the Incentive Research Foundation (IRF) to determine how companies are adjusting their incentive trips with this generation in mind. A full 77% said they see generational demographics changing the way they plan events in the next two to five years. Many of those changes are already in full swing. 94% have altered the trip's activities, 76% have changed the entertainment and 66% have stepped up the social media around the trip.

Some companies have gone so far as to create totally separate trips to appeal to different generations. When asked to rate the effectiveness of various trip incentives, companies rated creating separate trips the highest. But not every company has the bandwidth or budget to customize trips by generation. With Millennials set to comprise half of the global workforce by 2020¹, keeping the generations together with an eye to the evolving preferences of Millennials may be a more successful and sustainable strategy.

A Desire to ENGAGE

Perhaps the most exciting philosophical shift is that the Millennial generation is one that wants to be engaged. The promise of a vacation and some on-trend gifts is not enough to inspire Millennials to do their best in the workplace. A local immersive experience is what this growing population is looking for, and what will inspire them to succeed.

"The ultimate goal of an incentive program is to motivate, recognize and reward. We can now add 'engage' with confidence as the road to a successful incentive program really starts with engagement," says Milton Rivera, Vice President of Sales at American Express Meetings & Events. "The Millennials

Sources: (1) http://www.catalyst.org/knowledge/generations-demographic-trends-population-andworkforce, August 20, 2015. (2) Prevue and The Incentive Research Foundation conducted an email survey of U.S.-based Prevue readers and IRF supporters for a three-week period beginning July 14, 2015. The results are based on 128 usable participants across multiple industries (pharmaceutical, financial, technology, etc.). are driving decisions from the very inception of the incentive program, the structure, the destination, the program content and the outcomes. This generation is full of game changers. Their fundamental need to engage is driving the evolution of incentive programs and the creation of new immersive and cultural experiences."

The impact can perhaps best be seen when exploring five key components of any incentive trip: destination selection, property selection, food and beverage, entertainment and gifts.

Emerging Destinations & Corporate Social Responsibility (CSR)

Millennials often crave exotic and cultural adventures. They are also motivated by doing good – leaving a location better than they found it. "Sun and Fun" style trips are slowly being replaced by those that involve hard work, either in the form of altruistic (CSR) activities (building houses or other infrastructure, for example) or extreme recreational activities, such as climbing, repelling, and survival skill challenges. "Younger employees want to feel that they're making a direct impact on someone's life," says Alan Ranzer, Managing Partner of Impact 4 Good and a leading voice in the CSR movement.

Incentive planners looking to cater to a predominately Millennial audience can engage attendees with opportunities to explore the local geography and cultures while giving back. And it needs to be meaningful, not a token charitable activity.

To illustrate, one cruise line has a new ship that will begin a weekly cruise from Miami to Amber Cove, Dominican Republic, starting in April 2016. Onboard, cruisers will undergo two days of intensive training in volunteer activities, such as learning to teach English or building water-filtration devices out of clay. Once in port, passengers will spend up to three days working with residents and local volunteer organizations. There's no casino on board and no fancy entertainment, just plenty of local food and beverage options.

Another example is "NeighborGOOD," a program that allows participants to see and learn about a city via an interactive urban challenge executed through their cell phones. "When the hunt leads to a give-back experience, everybody wins," says Mr. Ranzer.

The promise of these types of experiences is what motivates today's incentive travelers.

For hot incentive destinations, see next page.

Selecting Properties with a Purpose

Millennials are having an impact on hotel development and experiences. Many major hotel chains are developing brands geared towards the youngest working generation, with the mission of fostering a uniquely local experience. Millennials often crave exotic and cultural adventures. They are also motivated by doing good.

HOT DESTINATIONS FOR INCENTIVE TRAVEL

Today's hottest destinations for incentive travel are a mix of the up-and-coming and the tried and true. *By American Express Meetings & Events*



LOS CABOS, MEXICO

Put on the map by the Baby Boomers (individuals born in the late 1940s and the 1950s following the end of WWII¹) Los Cabos remains one of the top destinations for incentives. In addition to offering great weather and a beautiful landscape, you will find activities that appeal to all generations.

PANAMA CITY, PANAMA

Still emerging but coming on strong, this destination is exotic and diverse. From the vibrant and electric nightlife scene to jungle trekking, amazing ecosystems and surfing, there is an activity to suit every style. And of course – there is the awesome site of the 8th Wonder of the World, the Panama Canal.

MIAMI BEACH, FLORIDA, U.S.A.

Just take a look around and beauty is everywhere – the people, the beaches, the charming art deco boutique hotels. Your perennial favorites on South Beach continue to deliver on the promise of an outstanding event.

LAS VEGAS, NEVADA, U.S.A.

Las Vegas has changed so much from the "sin city" moniker of old to a culinary and

entertainment mecca. Millennials seem to be driving this new Las Vegas persona: they are not big gamblers but they love experiences. Expect to see more entertainment options and culinary choices as many seek to experience this destination in a new and more rewarding way.

NEW ORLEANS, LOUISIANA, U.S.A.

Ten years after Hurricane Katrina, this resilient "incentive gem" of a city has made its comeback. The rebuild has been transformative, and once again travelers can enjoy the amazing food, music and history of this French colonial city. There is still work to be done, however, resulting in an abundance of programs that offer visitors the opportunity to be immersed in post-Katrina city renewal projects.

RIO DE JANEIRO, BRAZIL

From the incredible vistas to the iconic images of famous guests, Rio de Janeiro is an incentive favorite. And with the Olympic Game coming to Rio, there has never been more excitement about one of the most beautiful cities in the world. Incentive groups have long desired to visit this exotic destination to explore the food, people, beaches and culture!

BUDAPEST, HUNGARY

This Eastern European city is rich in culture, history, and mystique that can equally satisfy all generations of inventive travelers. There are 135 natural springs with recognized medicinal properties across the country. In recognition of the increasing interest in healthy lifestyles, more



hotels in Hungary have developed fitness-wellness program packages. Add on the banks of the Danube, the Buda Castle Quarter, abundant gastronomic possibilities, golf and wine, and there is something for everyone.

VIETNAM

Vietnam is blessed with a pleasant climate and stunning landscapes ranging from mountains to river basins, with dense forests and vast tracts of emerald-green rice fields. Hanoi, known as the cultural center in the north, and Ho Chi Minh City (formerly Saigon), in the south, are both chaotic, invigorating cities with a delightful melding of cultures in everything from food to architecture.

EUROPE - RIVER CRUISING

Charter a vessel and explore some of the most beautiful rivers and canals in Europe. Smaller vessels can venture where the larger ships cannot, allowing for that local feel and more adventure. Shopping, entertainment, pubs and the local scene and scenery are just steps away as your attendees experience Europe in this unique and exciting way. With a myriad of food shows on television, and ingredients formerly considered gourmet now deeply rooted in the mainstream, Millennials have grown up as foodies. New themes and amenities are abundant, focusing on priorities like connectivity and wellness. Do not be surprised if you walk into a guest room to find more conveniences than in the past, like multiple outlets for various devices right on the headboard or a direct line to have a yoga mat delivered to your room.

"What I see is that design and individuality is a strong point in hotel construction. More unique and locally adapted properties are becoming the norm" says Rolf Schmidt, Founder and Managing Director of TOPHOTELPROJECTS. You will no longer see the same Hilton around the world. If you look at the latest 20 Hiltons, each are different in design."

Case in point: Curio – A Collection by Hilton has breathed new life into historic buildings, each with "stories to tell and secrets to share" and a promise of satisfying its guests' curiosity while delivering a local and remarkable experience. Certainly this approach takes on the Millennials' desire to not only have a unique experience but to acquire new knowledge as well.

Radisson[®] is focusing on catering to the Millennials' overall lifestyle through a unique and immersive experience. With Red, Radisson hopes to humbly wow its guests as it "re-interprets the guest experience," focusing on stylish and multi-functional guest rooms, and space to work, play, be social and workout punctuated by "simple food & drink done really well."

And speaking of food and drink, some

properties are promoting local healthy take-out or offering grab 'n' go options as a replacement for room service, which is often perceived to be more indulgent and expensive by younger generations.

It will continue to be important to ensure a property can accommodate your incentive group in terms of sleeping rooms and conference space. However there is a growing expectation that a hotel will delight and enrich, not just provide a decent night's sleep.

It All Comes Back to the Food (& Beverage)

With a myriad of food shows on television, and ingredients formerly considered gourmet now deeply rooted in the mainstream, Millennials have grown up as foodies. Older generations have developed a new standard as well. There's an expectation of having local food and wine or a craft beer experience as part of the incentive trip for attendees of all ages. Heightening the local focus and upping the level of sophistication around food and beverage can be a real winner for incentive events.

To make culinary experiences more dynamic and memorable, you might consider the following ideas, courtesy of Hilton Worldwide:

Cold-pressed coffees: Include local coffees, iced or cold-pressed — even in the evenings. Millennials in particular do not necessarily want to drink alcohol every night.

Elixirs: When it comes to alcoholic drinks, it's all about the ingredients. One Australian company creates simple syrups, elixirs and bitters from local ingredients using a vintage Victorian press. Lemons, oranges and limes are run through the press, creating zests for the elixirs used in craft cocktails.

Roasts: Millennials and Gen X-ers (those born 1966-1980¹) have an expectation that they can acquire knowledge and get their questions answered. So why not bring in the local butcher or meat producer to do a roast during a buffet? Encourage interaction: give attendees the opportunity to learn the best techniques to roast their own meats.

Shared tables: There is a growing resistance towards separating tables, when the goal of an event is to get people to meet. Shared tables and food join a group together. It's no longer, "That's my table, that's your table." A benefit of this shift? Fewer complex seating charts to manage.

Wellness-driven F&B: Increasingly, attendees are expecting organic, sustainable food and an awareness of food allergens and intolerances. Seek to understand attendee needs well before you get to the event. Capture preferences and special needs during event registration. Familiarize yourself with the most common allergens as well as the characteristics of popular and religious dietary regimens such as gluten-free, vegan, kosher and halal. Work with the venue to ensure that they can accommodate all special needs to the same standard and quality as the primary meals. Make sure that special meals make their way to the proper recipient. Label menus and buffet selections thoroughly, taking advantage of anywhere you have the opportunity to tell an attendee more about the food they are about to consume. Check on your attendees to be sure they are satisfied.

Engage with Interactive Entertainment

Down time for Millennials isn't as simple as planning music and fun by the pool, shopping excursions, or golf, which used to be the staples of incentive travel. They want to be stimulated, inspired, educated, and engaged. Yet being born into the digital age, they are accustomed to immediate gratification. And they have already seen and shared a lot of cool stuff. You are left with the challenge of trying to impress a worldly, savvy audience. If you don't deliver fast and now – or worse – allow them to get engrossed in their smartphones, you will lose them.

Dig deeper and think about those activities that will delight your attendees and keep their hands busy, such as these, courtesy of Craig Sutton, also known as the EventGo2Guy:

A digital graffiti art station using digital "spray-cans," which are fumeless and odorless, to create printable graffiti artwork.

A custom game room featuring

Down time for Millennials isn't as simple as planning music and fun by the pool, shopping excursions, or golf. They want to be stimulated, inspired, educated, and engaged. basketball, table tennis, Cornhole, foosball and a putting green. Playing games gets people connected and communicating.

- For a mini-break, a "brain-sensing headband" that works with an app and takes brain-activity down to a more relaxed state, allowing winners to relax, de-stress and meditate, clearing the mental clutter.
- Offer a GoPro[®] camera for attendees to capture their adventures, both during the main program as well as on breaks, then incorporate the best footage into the closing program.
- Of course, have a sound strategy for your mobile event app, incorporating Facebook, Twitter and Instragram and as well as a gamification angle so that when your attendees DO turn to their smartphones, they can still be deeply engaged in the event.

Gifting, Updated

Incentives wouldn't be incentives without the gifts. This is another area where new trends are emerging.

Whereas in the past brands and labels might have been important to winners, this generation of younger attendees prefer to choose their gifts at an amenity bar, often set up right at check-in. Here, the sponsoring company can offer a choice of everything from beverages for the rooms to flowers to custom goodies, including some new on-site amenity experiences by Doug Chorpenning, CEO of Graffiti Mercantile:

- **Sunglass shop:** Let winners choose handmade wooden sunglasses (vintage style for hipsters of all ages). Each pair is a unique piece of art.
- **Craffiti gifts:** Tag your brand with urban-inspired art on high-quality products, such as T-shirts and snowboards.
- > Live event art: Commission a high-profile local artist to capture the vibe of your event on canvas, and then send each attendee an original print as a commemorative piece afterwards.
- **> AMPed:** Let attendees select a pair of vintage inspired headphones or Bluetooth speakers.

The formula for a successful incentive event is certainly changing. In some way, perhaps, it is more complex but it is also more conscientious, inventive and unique – qualities that should engage and inspire your top performers and incentive travelers. Creating the right combination of destination, property, cuisine, entertainment, and gifts can help you meet and exceed incentive traveler expectations. Perhaps more importantly, you can create the motivation for employees to excel and drive business results in the hopes of being selected to attend the next year's trip.





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Taking Luck Out of the Equation – Interact, Learn and Measure with Mobile Apps

By Lawrence Coburn, CEO and Co-Founder, DoubleDutch

The online world is colliding with the offline, rendering the smartphone a remote control for life.

Three years ago, one may have hit a city street in the hopes of hailing a taxi. Today, ridesharing companies have made that ride a near certainty. These types of companies are creating a thin digital layer on the physical world's taxi infrastructure, which is made up of cars, human drivers and roads. Users can see their car coming towards them on their phone at the same time that their real-life car is coming towards them in the physical world. Apps for such services are taking the luck out of the equation, improving chances for a positive outcome, and enhancing real-life experiences at the speed of the Internet.

In the technology space, this concept is referred to as "Assisted Serendipity." It's time to use this powerful combination of data, context, and analytics to help drive positive outcomes from physical meetings and events, all through a well-designed mobile strategy.

The good news is that the vast majority of meeting planners have already realized the potential of mobile use for events and are deploying event apps at an ever-increasing rate. The real challenge for meeting planners today lies in understanding and taking advantage of the full value of an event app.

Choosing the right app partner, then providing the optimal mix of content and functionality will address the planner's need to:

- > Inform: Provide attendees with the information they need to ensure they have the best event experience possible.
- Engage: Transform passive attendees into active participants by enabling them to interact with each other, hosts, sponsors, exhibitors.
- > Analyze: Empower the meeting planner to gain insight and value from the wealth of data generated via the meeting app.

Choosing The Right App for Your Event

Today's meeting planner has many distinct technology needs – event registration, attendee management, expense management, customer relationship management (CRM), and marketing automation among possible others. Throwing a mobile app into the mix can feel like the proverbial straw that breaks the camel's back. As such, there is a growing desire for an end-to-end event technology solution, or at least a means to consolidate and do more with fewer solutions.

For example, some event registration systems offer mobile capabilities. This can indeed be a very attractive option and, in some instances, may be a good one for a meeting planner. It is important, however, to understand if this consolidated approach enables the desired capabilities and can perform as well as two separate solutions. Meeting planners should evaluate their options to determine whether what they gain from a simplified, streamlined solution does not sacrifice functionality. It is critically important to evaluate each independently.

With event apps, as with any type of software, your particular event goals should be considered and used as the criteria for selecting the ideal mobile app provider. Planners should start by creating a list of the features that will help them achieve their unique event goals, and then compare that with the offerings of potential vendors. Attendees should be able to access critical event information even if the Wi-Fi network goes down.

Make sure your event app offers an offline mode and that event information. such as the agenda, speaker bios, and exhibitor lists. are downloaded and stored (cached) locally on the device.

If you have a last-minute change to your agenda, or other important information to communicate with attendees, consider a push notification to send an alert to everyone's mobile device.

To ensure this list is complete, meeting owners need to consider the right questions: What do I want my attendees to get out of this event? Is it an internal company event or an external conference? Do you have speakers? Exhibitors? Multiple tracks? The answers to these questions will help you determine the features that matter most.

For example, if the event has exhibitors, one might need an app that does in-app badge scanning and lead scoring. If hosting speakers, attendees should be able to rate sessions afterwards for quick and easy assessment of each session. Live polling may be desirable, to give the speakers the ability to interact seamlessly with their audiences, even change their content on the fly. For an internal event, an engaging social platform might help ensure the app reflects the company culture and elicits excitement from the employees.

Every event is different, and an app strategy should be tailored to best suit the event's specific needs. It is important to prioritize the user experience, and not to sacrifice important features for the sake of convenience.

Integration is also an option. There are many best-of-breed providers who build simple integrations with other systems that are in use, so that multiple solutions come together and behave as one.

The bottom line? Focus on maximizing event success rather than minimizing vendor count. When it comes to attendee experience, the tools can make all the difference.

Setting Up Your App for Success

PART 1: THE ESSENTIALS

The most basic element of your mobile application is its content. Your event app should house all pertinent event information, from session descriptions to speaker bios and exhibitor details. Most importantly, it should be easy for you to make updates on-the-fly that are instantly reflected in the attendee's hands to ensure information is distributed efficiently across the full attendee base.

More content-specific features, such as interactive floor maps, give attendees the ability to get from one session to the next in a seamless manner. Other things to consider would be access to other critical information, such as how to access Wi-Fi, transportation information, lodging details and specifics on evening activities.

An event app's scheduling tool is one of the most important items in your arsenal. Giving attendees the ability to see a schedule at a glance, filter by topic, theme or badge type, build their own agenda and receive notifications, ensures a smooth event for all involved.

Session descriptions should be succinct, and feature an attention-grabbing title, intended takeaways, date, time and location, and speaker information. For large conferences, session descriptions should also be linked to the room location on the interactive map so attendees can quickly find their way from one session to the next.

PART 2: FACILITATING INTERACTION & ENGAGEMENT

While the educational aspect of a conference is important, many attendees cite networking as a primary reason to attend an event. Whether they share tweets and Facebook updates, or have a lengthy conversation over a cup of coffee, attendees agree they learn more from having a conversation than they do from any other aspect of a conference.

Interactive capabilities within an app, such as the ability to post a status update, "like," comment, and interact with other attendees or exhibitors provide an additional social setting that remains open 24/7, long after the hallways and conference rooms go dark.

Provide attendees with a social experience similar to what they are already used to on social networks like Twitter and Facebook. Allow them to post status updates detailing what sessions they're in, what they're learning, and what they're looking forward to. They can comment on each other's posts, share photos, use hashtags to sort conversations, and mention other attendees in their own updates or comments. The app technology gives everyone involved with the meeting or event — from the organizers, to the sponsors, to the attendees — an opportunity to be heard.

The social interaction provided by the app could encourage attendees to "follow" each other. By following each other, attendees are notified when someone posts a status update, which leads to more interaction and familiarity when they meet up with each other offline. And this scenario doesn't apply just to attendees. Speakers, sponsors, and even organizers can benefit from chatting in the app.

Gamification is a great way to encourage networking, interaction and participation in the application. By rewarding users for taking specific actions with digital rewards, such as points and badges, gamification can turn an event into a competition in the best way possible. Part of the reason gamification is such a successful strategy is because it taps into our most basic instincts and desire for competition and achievement.

For example, you can customize the game mechanics of your event app to offer in-app badges (achievements) for taking specific actions such as following a certain number of other attendees, and checking into sponsored receptions, exhibitor booths, and sessions.

Attendee surveys provide important feedback to conference organizers, speakers, and sponsors. Attendees are encouraged to give real-time feedback via the application rather than be asked to think about their experience days or weeks after the event has ended. This impacts more than just completion rates by giving the organizer valuable feedback that they can use to shape the meeting experience in real-time.

Speakers can use live polling in the application to make their sessions more interactive to collect real-time feedback and tailor the content of their presentation in the moment. Doing so helps the The beauty of the app is that everything is in one place without having to switch to different platforms or printed materials. Having the social elements combined with all the other benefits of the app helps to elevate the attendee experience.

Organizers should consider how they use promoted posts not only for sponsors, but also for their own communication with attendees. For example, organizers can notify attendees of special deals or opportunities during the event. room changes and more.

speaker ensure they are providing valuable information to their audience while improving the overall event experience for attendees.

Interacting via a private social community is fun, but event owners and sponsors like to see activity extend beyond the app as well. For many events, it's important to see buzz on social networks because it can drive attendance and sales for future events. When a user syncs his or her social profiles to their profile in your event application, they can seamlessly push status updates out to those social networks directly through the application, helping to elevate both themselves and the event across social media.

Leverage push notifications to drive engagement in your application while keeping attendees up-to-date on the latest schedule information. Push notifications are updates that appear on a user's mobile device at a desired time to deliver relevant calls to action for attendees and encourage interaction. Push notifications can show up on all users' screens or can be segmented to specific groups of users, provided those users have elected to receive push notifications.

Location-based messaging is a great way to drive engagement with attendees. For example, when an attendee comes within close range of a key sponsored booth, a beacon (using low-energy Bluetooth) can trigger a welcome announcement to the attendee as he or she physically approaches. This not only gives the exhibitor more exposure to attendees, but is relevant to the attendee.

PART 3: DATA, ANALYTICS, AND INSIGHTS TO DEMONSTRATE ROI

Digital marketers have been able to make data-driven decisions for years – making tough calls on where to put dollars using hard numbers and data. Like digital marketers, meeting planners are faced with difficult decisions every day and must constantly fight to demonstrate the value of face-to-face meetings. Sometimes you go with your gut, experience, or intuition, but whenever possible you pay attention to all the data in front of you to ensure the best possible outcomes.

Knowing your attendees' habits and how they react to different experiences and opportunities is crucial to planning future events, as well as attracting sponsors and exhibitors moving forward. Your event app needs to have a solid analytics dashboard that gives you a clear picture into your event's performance to calculate and demonstrate return on investment (ROI).

With an app that has an engaging social layer to it, like the features mentioned earlier, you have the ability to capture compelling insights and data that can help demonstrate event return on investment. You might also use the data to create reports for your internal team, media kits, one-sheets, and other marketing collateral for your meeting or event.

Through your event app's insights dashboards, you should be able to

answer the following questions while your event is happening:

- > What is the overall sentiment of my attendees?
- > Who are my most popular and influential speakers?
- > Who are my most influential attendees?
- > Which of my sessions are receiving the most buzz?
- > Which topics are my attendees most interested in?

As mobile applications become commonplace at events, a wealth of attendee data becomes available, changing the game completely for meeting planners.

With new access to a wealth of in-app engagement data, you could have the ability to measure and demonstrate success just like your digital marketing counterparts. Fighting for budget is no longer a challenge, and we can start to take luck out of the equation for events, improving outcomes for every event stakeholder. There's no such thing as bad feedback. Use all the data you gather through the insights as an opportunity to grow — even if some feedback isn't entirely positive.

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Global Compliance Outlook – Meetings

Regulatory compliance continues to be a critical issue for corporations and their meetings operations is one operational area where the potential risks and penalties can be significant. In particular, government regulators around the world have focused on individual accountability and corporate officers' conduct. Non-compliance can result in significant consequences for both corporations and individuals. The risk of substantial monetary penalties, incalculable reputational harm and potential civil and, in some cases, even criminal liability has become commonplace. Within the meetings and events space, the highest risk of non-compliance is typically related to:

Meeting payments, expenses, and records,
Handling of Personal Information (PI), and
Attendee selection.

To mitigate such risks, organizations must establish appropriate internal controls throughout their area of operations.

Meeting Payments, Expenses, and Records

Meetings is one area where organizations need to strategically consider their options and create robust controls to mitigate their risk of potential improper payments. Corporations that fail to conduct substantial vetting of third parties and in some case even fourth and fifth parties — to confirm that these vendors/intermediaries share a commitment to ethical and compliant business practices leave themselves vulnerable and exposed to potential liability by regulators in their home country and abroad.

Corporations must be particularly mindful of expense management, risks and confident that its meeting management partner, including any subcontractors, agents and sub-tiered suppliers, have appropriate controls in place to avoid potential improper payment risk. Many leading life sciences companies are now requiring that meeting management companies have onsite personnel in attendance. This ensures independent and accurate attendance is taken throughout the meeting, as well as instituting strict controls to prevent expense fraud at the execution level and avoid any risk of inaccuracies in the companies' books and records. In fact, many multinational corporations now require meeting management companies to provide accurate expense tracking, post-event reporting, and audit services as a matter of course. Sophisticated and experienced meeting management companies anticipate these issues and partner with organizations' procurement officials prior to the event to satisfy compliance policies and procedures.

HOW TO COMPLY

- 1 VET all third party partners and
- ⊥ subcontractors.
- Accurately TRACK and DOCUMENT attendance to allow expenses to be properly assigned.
- Be prepared to offer TRANSPARENCY into the meeting expenses, clearly and accurately labeled, and calculated to a cost-perattendee where required by law.

CASE IN POINT

In 2011, the U.S. Justice Department came under scrutiny for allegedly spending \$17 on each muffin served at breakfast during a conference at a Washington, D.C., hotel. A thorough audit was completed and it was determined that the charge was actually for a larger breakfast that included several items, tax, and gratuity, therefore justifying the expenditure. Better documentation of the charges could have saved the department and the hotel a great deal of embarrassment and negative publicity.

Personal Information

While anti-corruption compliance risk remains at the forefront, it is far from the only compliance issue multinational corporations face when conducting a meeting. Technological advances in the form of mobile apps and beacon technology provide enormous opportunities for corporations to gather and collect real-time data. On one hand, it can also automate attendance tracking, helping to promote compliance. However, it can create significant risks if adequate controls are not in place for protecting the multitude of Personal Information (PI) that may be acquired and using it in an appropriate manner. With the technical ability now available to track attendee movement within a conference environment. for example, the need arises to ensure that information is adequately safeguarded and used within the bounds of existing regulations. At a minimum, organizations should ask themselves:

- > What type of PI will be collected?
- > Why will it be collected?
- > Does it need to be collected?
- > How will it be used?
- > Will it be sold or disseminated?
- How will individuals be able to access/amend

Pl about themselves?

- > How will it be stored, secured and disposed of?
- Are the planned uses allowable within the regulations that apply to this event?

Corporations need to strategically consider these issues and their potential impact – prior to the meeting – and ensure that their meetings management company and any third party vendors are able to execute their vision, within the compliance parameters that apply to the event.

HOW TO COMPLY

COLLECT only information that is purposeful and required for your event and ensure that required opt-ins and consent are in place.

DISCLOSE to individuals how PI will be collected, used, disseminated, stored and disposed of prior to collecting it.

Thoroughly ASSESS technology partners and products that will be receiving and storing data on your behalf, including conducting a physical site inspection as needed, and ensure they comply with all legal, regulatory and policy requirements.

Attendee Selection

In addition, multinational corporations also need to be aware of the ever-changing geopolitical environment, including the complex and constantly evolving global sanctions regime, which can impact the allowable set of attendees for an event. Corporations, either independently or through their meetings management company, should conduct real-time screening of scheduled attendees to ensure that all proposed attendees are permitted to attend all conference events. This type of "sanctions screening" will avoid placing companies and attendees in embarrassing situations where attendees are prohibited from attending certain meetings and events due to their citizenship or political background. Corporations must pay particular attention to existing sanctions and international trade controls to ensure that the citizenship of attendees does not preclude certain content from being exhibited and discussed, or alternatively, that appropriate export licenses are in place to allow for any technological discussions.

HOW TO COMPLY

- SCREEN attendee lists prior to sending invitations to identify individuals that are prohibited from attending an event.
- 2 LEVERAGE your attendee management software to ask additional qualifying questions that may raise a flag around attendees not identified during the initial screening.
- Have attendees personally VERIFY their eligibility to attend an event during the registration process.

Internal Controls & Risk Mitigation Strategies

Due to the heightened regulatory environment and the potential risks it presents, leading corporations are now inserting their internal compliance departments as the final approvers for engagement of meetings management companies as well as for each proposed meeting or event. Common internal controls being implemented include:

> Review of the proposed meeting agenda;> Screening of proposed attendee lists to ensure

adequate business justification exists;

- Review and screening of suppliers;
- > Appropriate handling of PI;
- > Development of per attendee spending budget reports; and
- Completion of audit reports following the conclusion of the event to confirm attendance, spending, and other key metrics.

Emerging Region Considerations

All of these challenges outlined above can be even more significant in emerging regions, where business growth opportunities and the need for in-person training or conferences are greater. Sophisticated meetings management companies – with their global reach and experience with local suppliers – can help navigate some of the difficult logistical issues that may arise in developing regions. Companies should be particularly vigilant in making sure that local vendors are subject to appropriate due diligence and aware of the companies' policies on ethics and compliance.

Summary

Meetings will continue to serve as a powerful tool for corporations to gather key stakeholders – customers, employees, and supply chain personnel – to establish alignment, direction and guidance to achieve the corporations' goals. Along with a detailed budgetary analysis, successful meetings should include a review of regulatory compliance requirements early in the planning process to help guide the critical procurement decisions that follow. Experienced meeting management companies can serve as a valuable resource to assist corporations in executing a within budget, compliant, and high-impact event, which can serve as the critical foundation for increased growth and future sales.



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Trends by Region and Commentary

NORTH AMERICA

Meetings Activity

A good time to meet. 2016 points to an increase in all meeting types in North America, further fueling the increased activity witnessed in 2015. Training and internal team meetings are predicted to comprise the largest number of meetings per program in 2016, at an average of 15.7 and 14.7 meetings per program respectively, followed by sales/marketing meetings and conference/trade shows. While respondent predictions vary considerably by meeting type in 2016, over 90% of respondents expect their activity for all meeting types to remain steady or increase for 2016. This marks a positive trend that continues to build on the growth in activity experienced in 2015.

Resurgence of internal meetings. Survey respondents were most likely to predict an increase in the number of training meetings, compared with other meeting types. Training meetings had seen cuts in recent years, with efforts to reduce costs by holding meetings less frequently and through teleconferences and online webinars. "As budgets loosen a bit, we're seeing the number of these meetings rise quickly," explains a North American meetings professional. This marks an important return for internal face-to-face meetings, and their resurgence in 2015 is predicted to continue through 2016.

Special events are trending up. As budgets allow for a renewed focus on employee-centric meetings, companies also appear to be rewarding their staff by planning more incentive meetings for next year. While 4% of respondents anticipate a decrease in special events and incentive meetings, a full 22% predict an increase. As one meetings professional notes, "Special events are trending upward again. In terms of incentives for first tier performers, and second tier performers we are seeing a willingness to incur a higher cost per head, but for smaller numbers of people." This ability to spend more to reward performance is a relatively recent trend as incentive spend appeared to be under pressure during the recession.

Sales are up. Recent economic growth is also reflected in a predicted increase in sales and marketing meetings as well as trade shows. These predictions point to a more positive sentiment regarding the role of these types of meetings in promoting further revenue growth.

Number of Attendees per Meeting

Meeting size and length remain stable. As the number of meetings is predicted to increase across all types, respondents indicate that the number of attendees will also trend upwards for 2016. Overall, only one in 20 respondents predicted a decrease in the size of each meeting type, with the rest indicating similar sizes or an increase.

Conferences and trade shows have the highest average predicted number of attendees at 455, followed by incentive and special events at 210 attendees. Moreover, respondents are most likely to predict an increase in those meeting types. Advisory board meetings and senior leadership meetings are smaller, at a predicted average of 48 and 62, respectively.

In addition to the expected growth in meeting sizes, the experts we interviewed point to a heightened focus by meeting planners on ensuring that the right attendees are invited to events in order to maximize ROI and increase compliance.

Days per Meeting

While respondents are optimistic about growth, the length of meetings is predicted to remain largely unchanged over the coming year, although the trend is towards slightly longer meetings, on average. Advisory board meetings are expected to increase to two full days.

Meetings take on a life of their own. While days per meeting remain the same, new technological innovations are allowing meetings to extend beyond the actual face-to-face component. One meetings professional explains that, "In the past, a four-day meeting would have had additional sessions prior to or following the actual meeting. Now, however, the meeting can 'take on a huge life,' with the prevalence of mobile applications. Attendees are communicating with each other weeks in advance of the meeting and the length of the meeting can extend out for months afterwards."

Number of Meetings Planned

MEETING TYPE

Sales/Marketing	12.2	
Training	15.7	
Internal Team Meeting	14.7	
Product Launch (Internal/External)	5.1	
Conferences/Trade shows	10.0	
Senior Leadership Meeting/Board Meeting	8.1	
Advisory Board	7.6	
Incentive/Special events	6.2	

Number of Attendees

MEETING TYPE

Sales/Marketing	173	
Training	141	
Internal Team Meeting	89	
Product Launch (Internal/External)	198	
Conferences/Trade shows	455	
Senior Leadership Meeting/Board Meeting	62	
Advisory Board	48	
Incentive/Special events	210	

Days per Meeting

MEETING TYPE	2016	2015
Sales/Marketing	2.4	2.4
Training	2.5	2.4
Internal Team Meeting	1.8	1.8
Product Launch (Internal/External)	2.3	2.2
Conferences/Trade shows	3.2	2.9
Senior Leadership Meeting/Board Meeting	2.2	2.1
Advisory Board	2.0	1.7
Incentive/Special events	3.2	3.2

(Source: American Express Meetings & Events North American Survey, August 2015)

Meetings Budgets & Planning

Overall Meeting Spend & Cost Per Attendee

The importance of meetings. On average, respondents predict a 1.9% increase in their overall program spend. While this may seem small, it does mark the largest forecasted spend increase since our inaugural 2012 forecast. One North American meetings expert speaks to the rising value attached to meetings and events: "Part of the whole rising body of knowledge around meetings and events for companies is better understanding the value of the interaction and what it drives." Meetings provide the opportunity to engage and reward, thus helping to build more profitable enterprises.

Stable spend, increased innovation. Predicted cost per attendee ranges from a high of \$711 for incentive and special events to a low of \$273 for internal team meetings. These predicted costs

SURVEY RESULTS

Cost Per Attendee (excluding air costs)

MEETING TYPE

Sales/Marketing	\$476	
Training	\$425	
Internal Team Meeting	\$273	
Product Launch (Internal/External)	\$419	
Conferences/Trade shows	\$609	
Senior Leadership/Board Meeting	\$510	
Advisory Board	\$489	
Incentive/Special events	\$711	

(Source: American Express Meetings & Events North American Survey, August 2015) reflect the nature of these types of meetings, the number of attendees and the potential venues for such meetings.

As highlighted above, experts suggest that as spend increases slightly companies are more selective regarding meeting attendees. One meetings experts explains that, "Budgets are still tightly controlled but meeting owners are willing to increase their spend per attendee where it can be justified." In fact, similar to activity and size predictions, over 90% of our survey respondents predict their cost per attendee to either stay the same or increase across all meeting types as there is a growing effort to enhance the quality of the meeting experience for attendees. "Most of our customers are looking for a new and unique experience, something different that inspires thought and creativity," notes a North American meetings expert. Respondents are most likely to predict an increase in their spending on conferences and trade shows, and incentives and special events.

Meeting Locations

Primary Locations for Meetings

Large cities still dominate. Similar to past predictions, respondents still expect more than three-quarters of their meetings activity to take place in large city locations.

Top 10 stability and slight shifts. According to Cvent, the top 10 North American destinations for all meetings remain largely the same for 2016 as they were in 2015, with a slight shift in their order. Orlando has taken the lead over Chicago and Phoenix has taken New Orleans' place as the No. 10 destination, although New Orleans remains a very popular incentives destination. The relative stability in the Top 10 list indicates continued interest in large metropolitan destinations. However, respondents do point to a growing appeal of smaller locations.

Smaller cities, mid-tier properties. While the top 10 destinations for North American meeting planners shifts only slightly, and large cities still dominate, meetings professionals have noticed a growing trend towards mid-tier properties in smaller cities in the face of limited space availability in larger locations due to the rise in activity. One meetings expert explains that, "As demand outpaces supply, getting the right property becomes a bigger driver than cost. The customer may want downtown Chicago but they go to nearby Schaumburg for availability reasons."

Pricing Trends

Group Hotel Rates

Supply and Demand. As the number of meetings increases across North America, securing first-choice and popular locations appears to be increasingly challenging. Respondents predict a decrease in space availability of at least 2.6% through 2016 and 2017 and a corresponding increase of 4.1% in hotel rates. Budget was identified as the key factor influencing meeting location by 28% of respondents based in North America. "We have more opportunity to negotiate where there is new hotel development and where there is inventory," explains one meetings professional. She and others suggest that "new hotel openings are not keeping up with demand in some key cities, dampening the ability to negotiate as hotels are more frequently at capacity." As noted earlier in the forecast, the number of hotel openings planned in 2016 has jumped significantly, which should help to alleviate some of the price pressure in the future.

Overall Meeting Spend

MEETING BUDGETS	CHANGE
Overall Spend	+1.9%

Primary Locations for Meetings



Group Hotel Rates

PRICING TRENDS	CHANGE
Group Hotel Rates 2016	4.2%
Group Hotel Rates 2015	4.6%
(Source: American Express Meetings	& Events

North American Survey, August 2015)

Top 10 U.S. Cities based on Meetings & Events Activity

- 1. Orlando
- 2. Chicago
- 3. Las Vegas
- 4. San Diego
- 5. Atlanta
- 6. Washington, D.C.
- 7. New York
- 8. Dallas
- 9. Nashville
- 10. Phoenix

(Source: Cvent, 2015



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EMEA

Meetings Activity

Number of Meetings by Meeting Type

Steady climb. Meetings activity predictions from survey respondents in Europe point to growth through 2016, marking a steady course and small upward trend for meetings activity throughout Europe that will continue from 2015.

Two-thirds of respondents predict that numbers of meetings will remain the same and more than 20% of Europe-based respondents suggest an increase across every meeting type.

Brighter in the U.K. Respondents in the U.K. expressed the greatest optimism, with most respondents predicting stability or increases in all meeting types. They see the highest increases occurring in sales and marketing meetings, with more than half of respondents expecting their sales and marketing meeting activity to rise next year.

Consensus in Germany. The sentiment from respondents in Germany is also quite positive. Virtually all respondents expect the same or higher activity across all meeting types.

Unique to France. Predictions for France vary more widely by meeting type, with planners

most optimistic about increases in incentive and special events meetings while a small number suggest a decrease in both training and product launches. Overall, most respondents see stability in their meetings activity for next year and the predicted declines are likely to be minor.

Team-building matters. Internal team meetings and training meetings are the most prevalent in meeting programs within the region at 22.7 and 21.9 respectively, driven by the high numbers in Germany and followed by the U.K. and the Benelux countries. Even with these high numbers, a German meetings expert suggests that, "Internal meetings including team meetings, and leadership and advisory board meetings are important, but there is greater effort to keep these small, local, and in-house as much as possible." Interestingly, respondents from France anticipate holding less than seven of either meeting type and they indicate their attendee size will be smaller as well, perhaps also indicating a preference for holding these meetings onsite.

Different ways to drive revenue. Sales and marketing meetings are also a key component of programs across the region at 20.1, again led by activity in the U.K. and Germany, but are less prevalent again in France. Instead, respondents from France appear to be more focused on conference/trade-show activity, indicating they organize six more per year than the regional average of 20.2.

Number of Attendees per Meeting

Big shows and launches. Conferences, trade shows and product launches are the largest events in the region at an average of 195 and 171 attendees, respectively. The U.K. tends to hold the largest product launch events and appears to have larger conferences than the other countries as well.

Make room for more. The size of events is slowly increasing for most meeting types across Europe. The majority of respondents predict that the size of meetings will stay the same going forward with most of the remaining respondents anticipating an increase in meeting sizes.

Again, predictions for the U.K. are optimistic, with most respondents predicting stability or increases in the size of meetings across all meeting types, and more than half of respondents in the U.K. anticipating an increase in the size of their sales and marketing meetings and product launches.

Half of respondents in France expect their conferences and trade shows to grow in size and none foresee a decline. Since, as mentioned above, these meeting types make up the largest component of their meetings programs, this makes a very positive move for that country. Respondents in Germany, however, predict either no change or a small decrease in the size of their conferences and trade shows. One meetings expert suggests that for German companies, "The focus is on getting the right audience in the room, not necessarily a bigger audience." Respondents suggest that for the Benelux countries, incentives and special events are the mostly likely meeting types to increase in size for 2016.

Days per Meeting

Stay the course. While the size of events is on an upward trend, meeting length is predicted to remain relatively unchanged across Europe. The outlier in this area is France, where days per meeting are predicted to decline in the coming year. Most meeting types in France are predicted to decline by a day, with the greatest change in internal team meetings and senior leadership meetings, both at 3 days per meeting in 2015 are expected to decrease to 1.3 in 2016. France is expected to see a decrease in the number of days per meeting in sales and marketing, to 1.5 days from 2.7, and in training, to 1.6 days from 2.9.

Meetings Budgets & Planning

Overall Meeting Spend & Cost Per Attendee

A return to growth. While doing more with less was the mantra for 2015, doing more with a little bit more is the mantra for 2016. Survey respondents suggest that across Europe companies will spend more on their meetings programs in 2016, up by 1.8% overall compared with a decline of 0.7% predicted in our 2015 Forecast. Respondents from France point to the largest change, from a predicted decline of 3.8% in 2015 to an anticipated increase of 3.3% next year.

As one European meetings expert explains, "We are seeing budgets growing. Companies had decreased spending so much in the past; now they are beginning to spend again as they recognize the importance of meetings to the overall success of their business." This is a very welcome change that bodes well for the industry in the region.

Number of Meetings

MEETING TYPE	EMEA	U.K.	GERMANY	FRANCE	BENELUX
Sales/Marketing	20.1 🔺	27.6 🔺	25.5 🔺	7.3 🔺	16.3 🔺
Training	21.9 🔺	24.9 🔺	25.0 🔺	5.6 🔻	25.6 🔺
Internal Team Meeting	22.7 🔺	24.2 🔺	28.3 🔺	6.6 🔻	24.4 🔺
Product Launch (Internal/External)	8.3 🔺	17.4 🔺	7.6 🔺	1.9 🔻	7.8 🔺
Conferences/Trade shows	20.2 🔺	21.3 🔺	19.7 🔺	26.1 🔺	18.7 🔺
Senior Leadership Meeting/Board Meeting	12.9 🔺	22.7 🔺	11.1 🔺	3.3	11.4 🔺
Advisory Board	11.3 🔺	18.9 🔺	3.6 🔺	2.7	12.7 🔺
Incentive/Special events	8.2 🔺	13.8 🔺	7.8 🔺	1.6 🔺	9.6 🔺

Number of Attendees per Meeting

MEETING TYPE	EMEA		U.K.		GERMANY	FRANCE	BENELUX
Sales/Marketing	103		205		104 🔺	31	90 🔺
Training	62		163		48 🔺	21	86 🔺
Internal Team Meeting	73		150		73 🔺	25 🔺	101 🔺
Product Launch (Internal/External)	171		286		270 🔺	219	55 🔺
Conferences/Trade shows	195		258		208 🔺	243 🔺	229 🔺
Senior Leadership Meeting/Board Meeting	37		104		26 🔺	48 🔺	40 🔺
Advisory Board	44		126		14 🔺	23	69 🔺
Incentive/Special events	137		206		154 🔺	67 🔺	140 🔺

Days per Meeting

MEETING TYPE	EMEA	U.K.	GERMANY	FRANCE	BENELUX
Sales/Marketing	1.9	2.3	1.9	1.5	1.9
Training	2.0	2.2	2.0	1.6	2.5
Internal Team Meeting	1.7	1.9	1.6	1.3	1.8
Product Launch (Internal/External)	2.0	2.3	2.4	1.3	1.9
Conferences/Trade shows	2.8	3.1	2.8	2.5	2.9
Senior Leadership Meeting/Board Meeting	1.8	2.1	1.8	1.3	1.8
Advisory Board	1.5	2.0	1.5	1.5	1.3
Incentive/Special events	2.5	2.7	2.5	2.7	2.2

(Source: American Express Meetings & Events European Survey, August 2015)

Growth with a purpose. Across all meetings types, the predicted cost per attendee for the region is also predicted to increase but not without scrutiny of how the spend is allocated. One meetings expert in Belgium notes that, "Expectations are changing and companies now have budgets to organize more expensive events. They're willing to pay for these events, but they want to get something back, and they want it to be special and memorable for their attendees."

Overall cost per attendee (excluding air costs) in the region is expected to be less than in North America or Central and South America. As an example, while the average cost per attendee for an incentive meeting is predicted to be \$711 in North America, the European average is \$551. Respondents indicate that companies in the U.K. plan to spend more per attendee than their counterparts in Germany, France or the Benelux countries on most meeting types, including sales and marketing and senior leadership meetings. France exceeds the European average of \$326 for training meetings and \$551 for trade shows, with spending of \$500 and \$621 per attendee respectively. While the European average for incentives and special events is expected to be \$551, German companies anticipate spending \$679 per attendee. One German meetings expert explains that, "In Germany, the economy is strong and stable, so companies have increased their meeting spend but they are much more focused on ensuring they are optimizing it."

Meeting Locations

Primary Locations for Meetings

Large cities still dominate. Large cities continue to be the preference for meetings through 2016, with respondents from France as well as Benelux more likely to choose second-tier city locations than respondents in the U.K. or Germany. In fact, 100% of U.K. respondents suggest that primary, large-city locations are preferred for meetings.

Content versus destination in Germany. A German meetings expert points to a country-level trend towards domestic over international

SURVEY RESULTS

Cost Per Attendee (excluding air costs)

MEETING TYPE	EMEA	U.K.	GERMANY	FRANCE	BENELUX
Sales/Marketing	\$337 🔺	\$430 🔺	\$338	\$150	\$335 🔺
Training	\$326 🔺	\$370 🔺	\$282 🔻	\$500	\$404 🔺
Internal Team Meeting	\$320 🔺	\$325 🔺	\$232 🔻	\$250 🔺	\$404 🔺
Product Launch (Internal/External)	\$401 🔺	\$431 🔺	\$421	\$100 🔺	\$436 🔺
Conferences/Trade shows	\$551 🔺	\$517 🔺	\$413 🔺	\$621 🔺	\$710 🔺
Senior Leadership Meeting/Board Meeting	\$432 🔺	\$639 🔺	\$513	\$150	\$323
Advisory Board	\$323 🔺	\$400 🔺	\$421	\$183	\$159
Incentive/Special events	\$551 🔺	\$544 🔺	\$679 🔺	\$460 🔺	\$475

(Source: American Express Meetings & Events European Survey, August 2015)

travel, as companies look to limit expenses by keeping travel closer to home. He indicates that, "Companies are continuing to focus on content and experience, rather than highly sophisticated destinations, and are decreasing their use of international locations." He indicates that this trend began three to four years ago and it continues to increase.

Going further afield in the U.K. A U.K.-based meetings expert explains that, "Many meeting owners are prepared to go further afield now because there are new air connections to unique

and often lower-cost destinations available to lift attendees from the U.K."

Keeping it in-house. Jose Miguel Moreno, Global Business Travel & MICE Director for Melia Hotels International, has seen many companies shift meetings to in-house facilities where possible in order to reduce costs. He notes that, "During the recession years, many companies put in place new rules that are here to stay. If companies can do meetings in their own facilities, they will." One U.K.-based meetings expert echoes that sentiment, saying that, "In this

SURVEY RESULTS

Individual Meeting Budgets

	EMEA	U.K.	GERMANY	FRANCE	BENELUX
Overall Spend	1.8%	3.1%	2.1%	3.3%	3.4%

Primary Locations for Meetings



	EMEA	U.K.	GERMANY	FRANCE	BENELUX	
2016	2.3%	2.6%	2.2%	2.5%	3.1%	
2015	1.1%	2.8%	-1.5%	1.4%	1.8%	

(Source: American Express Meetings & Events European Survey, August 2015)

post-recession period, more and more companies are trying to keep costs down by using their own meeting space for internal meetings, such as senior leadership and board meetings, and are considering less expensive destinations for incentive meetings."

Not as big. Jose Miguel Moreno also suggests that demand is for mid- to small-size locations over large resorts. "While U.S. companies hold massive events, these are

Top 10 Cities

Based on the activity of American Express Meetings & Events clients, the list of top 10 European cities has seen some significant adjustments compared with last year's forecast, although London and Paris retain their top positions.

Top 10 EMEA Cities based on Meetings & Events Activity

- 1. London
- 2. Paris
- 3. Amsterdam
- 4. Brussels
- 5. Frankfurt
- 6. Munich
- 7. Copenhagen
- 8. Barcelona
- 9. Riga

10. Berlin

(Source: American Express Meetings & Events Destination Analysis, September 2015)

Amsterdam has taken over Barcelona's spot in third place, as the Spanish city has fallen to eighth position. Berlin has dropped to tenth spot, while Rome and Nice have been replaced by Copenhagen and Riga.

Riga is perhaps the more interesting newcomer, as organizations from a wide range of sectors have been inquiring about the ability to host an event in the Latvian capital. Its designation as the 2014 European Capital of Culture, and its easy accessibility via air from Stockholm, Copenhagen and Helsinki are two likely drivers of this newfound popularity.

Pricing Trends

Group Hotel Rates

Increase in rates. Survey respondents predict slight increases in hotel rates through 2016. Respondents from Benelux countries anticipate the highest increase at 3.1%, followed by the U.K. at 2.6%. One U.K. meetings expert predicts that, "Average group rates in the U.K. will rise slightly in 2016 and if the British pound-to-euro exchange rate stays the same, more clients will take advantage of the lower euro which will reduce their overall cost."

ASIA-PACIFIC

Meetings Activity

A diverse region. As we see with other regions, respondents predict growth for Asia-Pacific in 2016, with small increases across all meeting types. This region is characterized by significant diversity in terms of its meeting and travel infrastructure, with countries such as Australia and Japan guite well-established in this regard and others such as Indonesia and South Korea building out their infrastructure and developing tourism at the same time. China continues to be a focus for many international corporations due to its appeal as a unique destination, the size of its economy, and the prevalence of manufacturing in the country. Other locations throughout the APAC region are also emerging as particularly appealing for the Asia-Pacific region and for a range of meetings types.

Compliance drives consolidation. 2015 saw compliance become a priority issue for this region. One local expert explains that, "As a result of several countries recently passing laws related to compliance, it has become number one on the priority list for many companies in the region." She suggests that, "As activities ramp up in countries like China, Japan and Korea, as well as less developed regions, consolidation of services becomes ever more important, as they look to ensure they are meeting the regulatory requirements."

Number of Meetings by Meeting Type

Rising numbers. Most respondents predict that the number of meetings will remain the same or increase through 2016 in this region. According to survey respondents, regional meeting activity numbers for Asia-Pacific are typically lower than for Europe but similar to numbers for North America and Central and South America. Sales and marketing meetings continue to be the most popular in the region, with an average of 12.3 predicted for 2016 and over half of respondents expecting an increase in this meeting type. The popularity of this meeting type reflects the predominance of manufacturing in the region. Incentives and special events occur the least often, with an average of 6.4 for 2016, although just under half of the respondents see this activity rising as well. Similarly, respondents in Australia predict fewer of these types of meetings than other types, but Australia stands out in Asia-Pacific as it exceeds the regional average in most other meeting types. Notably, respondents in Australia expect to hold 19.4 conferences and trade shows, 10 more on average than Asia-Pacific overall. They also anticipate 17.8 advisory board meetings per company; the U.K. and Australia appear to stand alone globally in their high numbers for this last meeting type. High numbers for internal and senior meetings in these countries may be explained by global expansion creating a prevalence of regional head offices in these countries and the appeal of

Overall Meeting Spend

MEETING BUDGETS	ASIA	AUSTRALIA
Overall Spend	+2.1%	+5.1%

Primary Locations for Meetings



Group Hotel Rates

	ASIA	AUSTRALIA
2016	1.5%	2.1%
2015	2.7%	2.4%

(Source: American Express Meetings & Event Asia-Pacific Survey, August 2015)

Top 10 Asia-Pacific Cities based on Meetings & Events Activity

- 1. Singapore
- 2. Shanghai, China
- 3. Hong Kong / Macau,
- 4. Beijing, China
- 5. Sydney, Australia
- 6. Tokyo, Japan
- 7. Melbourne, Australia
- 8. Bangkok, Thailand
- 9. Bali, Indonesia
- 10. Taipei, Taiwan

(Source: American Express Meetings & Events Destination Analysis September 2015)

these locations to senior management.

Number of Attendees per Meeting

Smaller meeting sizes, but growing faster.

Most respondents predict that the size of meetings of all types in the Asia-Pacific region will remain the same or increase over the coming year, and are particularly optimistic about the anticipated growth in sales and marketing meeting sizes. Respondents are markedly more optimistic than those in all other surveyed regions and suggest that Asia-Pacific meeting sizes will grow at a higher rate in 2016. At the same time, meeting size in this region remains smaller than in all other regions, indicating that there is significant room to grow. Australia stands out in predicting higher numbers than the regional average across many meeting types, and with the largest average numbers of attendees for sales and marketing meetings globally. While meetings may be larger in some cases, across the Asia-Pacific region meetings do occur less frequently than in Europe, due in part to the developing travel and meeting infrastructure in some areas of this large, diverse region.

Days per Meeting

Shorter meetings. According to respondents, meetings in the Asia-Pacific region tend to be slightly shorter than those in North America and mirror European days per meeting across most meeting types. Australia stands out again with longer sales and marketing meetings, as well as conferences and trade shows. While the average sales and marketing meeting in the Asia-Pacific region is anticipated to be 2.2 days long, the average Australian sales and marketing meeting is expected to be 3.3 days, a full 1.1 days longer.

Meetings Budgets & Planning

Overall Meeting Spend & Cost Per Attendee

Spending more. While regional predictions for 2015 suggested no increase, meeting spend in the region is now trending upward with this year's survey respondents predicting an increase of 2.1% through 2016. Australian-based respondents predict an increase 5.1%, much higher than all other regions.

A regional expert concurs with this survey result. "I do see spend rising, in some cases driven by companies now feeling like they have a better handle on their spend and where it's being allocated, so they are more willing to increase their overall budgets as a result."

More per attendee. Over 79% of respondents predict cost per attendee (excluding air costs) to remain the same or increase in 2016 across all meeting types. While the cost per attendee for meetings in the Asia-Pacific region tends to be lower than in North, Central and South America, it is slightly higher than the European spend. The one exception again is Australia, where reported average cost per attendee is higher across most meeting types. For example, the average cost per attendee for sales and marketing meetings is \$543 in Australia compared with \$406 in the region overall.

There is a wide spread in the average cost per attendee for incentive and special events as well, at \$856 in Australia as opposed to \$661 for the region. Incentives and special events have the highest cost per attendee of all meeting types but occur less frequently. As in other regions, there is an effort in the Asia-Pacific region to

Number of Meetings

MEETING TYPE	ASIA	ļ	USTRA	LIA
Sales/Marketing	12.3		12.9	
Training	10.6		16.6	
Internal Team Meeting	10.7		11.9	
Product Launch (Internal/External)) 5.0		3.3	
Conferences/Trade shows	8.9		19.4	
Senior Leadership/Board Meeting	6.3		9.4	
Advisory Board	7.5		17.8	
Incentive/Special events	6.4		6.0	

Number of Attendees per Meeting

MEETING TYPE	ASIA	A	USTRA	LIA
Sales/Marketing	122		211	
Training	52		75	
Internal Team Meeting	65		75	
Product Launch (Internal/External)) 85		111	
Conferences/Trade shows	209		165	
Senior Leadership/Board Meeting	38		38	
Advisory Board	56		33	
Incentive/Special events	140		61	

Days per Meeting

MEETING TYPE	ASIA	AUSTRALIA
Sales/Marketing	2.2	3.3
Training	2.1	1.7
Internal Team Meeting	1.9	2.4
Product Launch (Internal/External)) 1.4	1.5
Conferences/Trade shows	2.8	3.2
Senior Leadership/Board Meeting	2.1	2.0
Advisory Board	1.9	1.5
Incentive/Special events	3.3	3.1

Source: American Express Meetings & Events Asia-Pacific Survey, August 2015) make these events special, which reflects the global trend towards rewarding employees with a more unique and memorable experience, as discussed in the special section on incentives included in this forecast (see page 38).

Internal team meetings and advisory and board meetings tend to have lower costs per attendee in Australia than in the region overall. "The cost per attendee depends very much on the event. If the purpose of the meeting is to have a new experience, then the cost will be higher. If the purpose is education, then the meeting cost tends to be lower," according to a local expert.

Meeting Locations

Primary Locations for Meetings

Large cities still dominate. As with the rest of the world, large cities continue to dominate for meetings but 2016 predictions of 78% of APAC

meetings and 88% of Australia meetings are down from last year (85% and 92% respectively in the 2015 Forecast) indicating a slight shift away from large cities to other destinations. This reflects a global trend to consider alternatives to large cities due to cost and desire for unique locations. As one expert on meetings in the Asia-Pacific region explains, "As the economy and meetings industry progress in the region, clients are looking for more and more unique destinations, like Bali, for example." However, she suggests that, "Companies don't want destinations too far out because that can become a logistical nightmare. The push will continue to be on properties of recognizable brands that can provide the desired level of service and, more importantly, security." While companies grow more interested in new and exotic locations. they remain committed to addressing issues of compliance and risk and will be drawn to where the infrastructure is well-developed.

A meetings expert in the Asia-Pacific region

SURVEY RESULTS

Cost Per Attendee (excluding air costs)

MEETING TYPE	ASIA- PACIFIC	AUSTRALIA
Sales/Marketing	\$406 🔺	\$543 🔺
Training	\$311 🔺	\$421 🔺
Internal Team Meeting	\$232 🔺	\$221 🔺
Product Launch (Internal/External)	\$358 🔺	\$450 🔺
Conferences/Trade shows	\$459 🔺	\$550 🔺
Senior Leadership/ Board Meeting	\$590 🔺	\$592 🔺
Advisory Board	\$443 🔺	\$250 🔺
Incentive/Special events	\$661 🔺	\$856 🔺

(Source: American Express Meetings & Events Asia-Pacific Survey, August 2015)
notes that, "Destinations in Vietnam are becoming very popular as a potential destination, however concerns about visa issues, infrastructure, and transportation often result in companies choosing an alternate destination." She indicates that if a company does move forward with an event in Vietnam, "It usually takes place in Ho Chi Minh, Hanoi or Da Nang."

Top 10 Asia-Pacific Cities

Changing preferences. The ranking of top-10 cities for meetings and events within the Asia-Pacific region has seen some shift in the lower positions for 2016, according to an American Express Meetings & Events destination analysis. The top three cities remain the same as in 2015, with Singapore retaining its top position and Shanghai and Hong Kong/Macau trading places. Beijing has climbed onto the list at fourth, knocking Sydney down one position. Seoul, New Delhi and the Vietnamese cities of Ho Chi Minh and Hanoi have slipped off the list, with Melbourne and Taipei being the other two additions.

Pricing Trends

Group Hotel Rates

More per room. As with previous years, respondents predict an increase in group hotel rates but this increase has dropped to 1.5% for 2016 from 2.7% last year. A meetings expert suggests that, "South Korea, for example, is trying to bring large groups into their country so we're seeing a greater willingness to negotiate group rates, but as occupancy rises, the rates naturally follow. Unique destinations are becoming more expensive as demand for them increases." As the region's supply catches up with demand, rates are expected level off.

Compliance as a priority. Moreover, with growing attention to compliance across the region, this meetings expert suggests that, "We're seeing hotel negotiation with properties becoming harder and harder as customers are much more aware of other things beyond rates. It used to be that planners negotiated on the rate and everything else was standard but now you're negotiating on rates, attrition clauses, privacy clauses, etc."

Variability. The diversity within this region continues to affect rate differences and as larger events become more prevalent in the region rates are likely to rise further. As one meetings expert explains, "We're witnessing a high variability in hotel rates across the region and large events are having an impact. The 2020 Olympics, for example, are being held in Japan and we're already seeing rates rise."

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CENTRAL AND SOUTH AMERICA

Meetings Activity

As with other regions, the number of meetings in Central and South America is predicted to increase across all meetings types.

This region has been and continues to be dominated by global sporting events with an international football event in 2014 that sparked infrastructure development in Brazil and with a global sporting event to be held in Rio de Janeiro in 2016. These events and others draw attention to Brazil but also to the region more generally, with growing interest in Central and South America for meetings.

Number of Meetings by Meeting Type

More meetings in 2016. The upward trend that began in 2015 is predicted to carry through 2016 as meetings in Central and South America are predicted to increase across all meeting types. This positive trend can be linked to economic growth in some parts of the region, global events that are attracting attention to the region and the development of travel and meeting infrastructure throughout the region. One meetings leader in South America suggests that the growth in meetings is partly connected to the notion that the opportunity to travel, regardless of the purpose, is in itself an incentive for those in the region, providing an opportunity for independence and a "nod of confidence" to staff. She explains, "For many meetings, the travel aspect takes on another level of importance. The meeting may not be an incentive meeting but it is viewed by the employee as an incentive and has a big impact on morale."

A focus on revenue growth. The highest activity increases are predicted for sales/marketing events, product launches, conferences/trade shows and incentive/special events, indicating a focus on using meetings as a driver of revenue growth in 2016.

Number of Attendees per Meeting

More room required. The majority of respondents suggest that meeting attendance will remain stable, with just under a third predicting an increase in the number of attendees for incentive and special events as well as an increase for conferences and trade shows. A few respondents predict a decrease in attendee numbers, however. Respondents suggest an average of 297 attendees for incentive and special events, 257 for conferences and trade shows and 250 for product launches. In most cases, predicted meeting sizes exceed those

Overall Meeting Spend

MEETING BUDGETS

Overall Spend

+1.4%

Primary Locations for Meetings



Group Hotel Rates

Group Hotel Rates 2016	1.5%
Group Hotel Rates 2015	2.3%

(Source: American Express Meetings & Events Asia-Pacific Survey, August 2015)

Top 10 Central/South American Cities based on Meetings & Events Activity

- 1. Rio De Janeiro, Brazil
- 2. Riviera Maya/Cancun, Mexico
- 3. Panama City, Panama
- 4. São Paulo, Brazil
- 5. Cartagena/Bogotá, Colombia
- 6. Punta Cana, Dominican Republic
- 7. Buenos Aires/Mendoza, Argentina
- 8. Cusco/Macchu Pichu/Lima, Peru
- 9. Los Cabos, Mexico

10. Santiago, Chile

(Source: American Express Meetings & Events Destination Analysis, September 2015) in other regions. The larger forecasted size of meetings in Central and South America may be a result of larger companies completing the regional survey compared with other regions.

Days per Meeting

Longer conferences and trade shows. While respondents point to larger meetings and more meetings, predictions suggest that meetings will generally not increase in length with predicted days per meeting remaining relatively flat. The only notable shift is a predicted increase in trade-show and conference length to 3.3 in 2016 from 1.9 in 2015. The projected increase may be influenced by the size and type of respondent organizations from the region.

Meetings Budgets & Planning

Overall Meeting Spend and Cost Per Attendee

Budgets rising. Similar to North America, overall meeting spend per company is predicted to increase more in 2016 than in 2015, with an anticipated 1.4% rise in spending. Companies appear to be investing further in their programs, which aligns with the anticipated increases in activity and attendees.

Full service. One of the most significant differences in the Central and South American region is the desire for a full-service meeting planning process. Experts in the region suggest that the long-standing tradition of out-sourcing meeting planning will continue through 2016. Companies put out requests to potential meeting planning

vendors that typically include the need for end-to-end support for planning, marketing and hosting the event. One meetings professional explains that "while splitting sourcing from planning may be common in the U.K. or the U.S., for example, meeting owners in the region want comprehensive service from a single supplier. They are comfortable with outsourcing and would rather hand over the entire event to an outside provider." This adds another level to meeting planning in this region as meeting planners must be able to navigate the whole process in a region that values local, face-to-face relationships.

Big spend. Survey respondents point to higher cost per attendee (excluding air costs) across all meeting types in Central and South America compared with Europe and North America. For instance, respondents suggest the average cost per attendee to be \$911 for incentives and special events in Central and South America compared with \$551 in Europe. Cost per attendee for training meetings is predicted to be \$480 per attendee for Central and South America compared with \$320 for those in the Asia-Pacific region. Incentives and special events, as well as conferences and trade-shows, represent the greatest spend per attendee in this region, while training and internal team meetings are the lowest spend. Training meetings and internal team meetings remain of the lowest cost per attendee. As one meeting professional explains, while, "Companies are spending more and more money to train their employees, they don't necessarily require a lot of travel for these events."

Cost moving upward. According to respondents, the trend is for cost per attendee to rise slightly in 2016 for most meeting types. One meetings professional in Central America suggests that, "As some regional destinations

Number of Meetings Planned

MEETING TYPE

Sales/Marketing	11.7	
Training	12.1	
Internal Team Meeting	11.0	
Product Launch (Internal/External)	11.8	
Conferences/Trade shows	11.8	
Senior Leadership/Board Meeting	10.9	
Advisory Board	8.1	
Incentive/Special events	9.7	

Number of Attendees

196	
153	
112	
250	
257	
61	
130	
297	
	153 112 250 257 61

Days per Meeting

MEETING TYPE	2016	2015
Sales/Marketing	2.5	2.6
Training	2.3	2.5
Internal Team Meeting	2.3	2.2
Product Launch (Internal/External)	2.5	2.0
Conferences/Trade shows	3.3	1.9
Senior Leadership/Board Meeting	2.4	2.0
Advisory Board	2.1	1.8
Incentive/Special events	3.9	3.8

Source: American Express Meetings & Events Central and South American Survey, August 2015) become as popular as international destinations they are now quoting in U.S. dollars and rates are rising." While most respondents see little change going forward in the cost per attendee for some meeting types (sales & marketing, product launches, leadership meetings and advisory boards), just under a third suggest an increase for incentives and special events and conferences and trade shows.

While predictions are high in this region, there is apprehension as planners watch specific countries entering an election year in 2016 or those with uncertain economies, or both, each of which can impact meetings and special events.

Meeting Locations

Primary Locations for Meetings

A shift to large cities. As with other regions, the predominant demand in Central and South

America is for large-city locations, with respondents indicating an increased interest in largecity locations over 2015. Similarly, interest in second-tier locations as a primary meeting location have dropped from nearly 28% in the 2015 Froecast to just 8%. One possible explanation is the need to put meetings in the most convenient locations in order to save time for attendees who need to travel.

"The high demand for key cities reinforces the seller's advantage," suggests one meetings expert in Latin America. She explains that, "often, what we're able to do for our customers is secure availability at their preferred location, which may be more important than securing their optimal rate."

Top 10 Cities

Stable at the top. According to an American Express Meetings & Events destination analysis,

SURVEY RESULTS

Cost Per Attendee (excluding air costs)

MEETING TYPE		
Sales/Marketing	\$594	
Training	\$480	
Internal Team Meeting	\$480	
Product Launch (Internal/External)	\$687	
Conferences/Trade shows	\$778	
Senior Leadership]/Board Meeting	\$671	
Advisory Board	\$644	
Incentive/Special events	\$911	

(Source: American Express Meetings & Events Central and South American Survey, August 2015) the top 10 cities for meetings and events within Central and South America have changed little from 2015, with the top eight cities remaining the same. Rio de Janeiro, Brazil and the Riviera Maya/Cancun region of Mexico have retained the top two spots for the third straight year. Panama City has held its third-place spot as well.

Los Cabos, Mexico, joins the list in ninth place as a result of several new properties opening and its rising popularity as an incentives destination (see our list in the special section on incentives, page 40). Santiago, Chile, has edged onto the list in tenth place, partly due to its rising popularity as a destination for pharmaceutical events.

Pricing Trends

Group Hotel Rates

Slight change. Respondents expect hotel rates to continue to rise at an average of 1.5% overall. This prediction reflects the downward shift from the 2.3% overall predicted increase in the 2015 Forecast and the 4.6% predicted increase in the 2014 Forecast. With a major global sporting event coming to Rio de Janeiro in 2016, rates are expected to remain high for the near future. The rest of Latin America is expected to experience relatively stable rates.

TOP 10 CITIES PER REGION

NORTH AMERICA

- 1. Orlando
- 2. Chicago
- 3. Las Vegas
- 4. San Diego
- 5. Atlanta
- 6. Washington, D.C.
- 7. New York
- 8. Dallas
- 9. Nashville
- 10. Phoenix

CENTRAL & SOUTH AMERICA

- 1. Rio De Janeiro, Brazil
- 2. Riviera Maya/Cancun, Mexico
- 3. Panama City, Panama
- 4. São Paulo, Brazil
- 5. Cartagena/Bogotá, Colombia
- 6. Punta Cana, Dominican Republic
- 7. Buenos Aires/Mendoza, Argentina
- 8. Cusco/Macchu Pichu/Lima, Peru
- 9. Los Cabos, Mexico
- 10. Santiago, Chile

EUROPE

- 1. London
- 2. Paris 7. Copenhagen

6. Munich

10. Berlin

- 3. Amsterdam 8. Barcelona
- 4. Brussels 9. Riga
- 5. Frankfurt
- 5. FLAHKIULL

ASIA-PACIFIC

- 1. Singapore
- 2. Shanghai, China
- 3. Hong Kong/Macau
- 4. Beijing, China
- 5. Sydney, Australia
- 6. Tokyo, Japan
- 7. Melbourne, Australia
- 8. Bangkok, Thailand
- 9. Bali, Indonesia
- 10. Taipei, Taiwan

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Methodology

To develop this 2016 Meetings Forecast, a number of sources were used, including proprietary American Express Meetings & Events data sources, licensed third-party data and industry information, and interviews with industry leaders.

Surveys of meetings professionals were conducted to uncover trends across North America, Europe (France, the Benelux countries, Germany, the Nordic nations, Spain and the United Kingdom), the Asia-Pacific region and Central and South America. A survey of leading hotel and air suppliers and follow-up interviews were also used to inform the findings in this forecast. Information and data was also gathered from actual and planned meetings activity of American Express Meetings & Events globally.

For this 2016 forecast we adjusted our survey to collect an additional level of detail for various attributes. We asked respondents for more absolute figures associated with number of meetings by type, number of attendees by meeting type and more. Indications of growth or decline over the previous year are also included to provide a continued sense of how the industry is trending.

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