

A hand holding a smartphone to take a photo of a stage event at a conference. The phone's screen shows a stage with a speaker and an audience. The background is a blurred conference hall with blue and yellow lighting.

2019 Global Meetings and Events Forecast



MEETINGS & EVENTS

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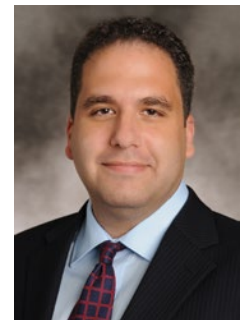
Settling Into a New Normal

Dear Readers,

Welcome to our eighth annual Global Meetings and Events Forecast. We've transformed the Forecast for 2019, shifting the look and feel to continue to bring you the most comprehensive data set about the industry while increasing the readability. Each section now comes with an easy-to-digest infographic and brief overview. For data lovers, a comprehensive set of data tables with conclusions is available in the appendix. We believe this shift represents the best of both worlds. We hope you agree.

Our 2019 Forecast reveals that we are settling into a new normal as an industry, with consistent positive increases in both spend and attendees for the last four years. Just ten years ago, the meetings industry experienced a dramatic slowdown. What we see today is an environment where meetings are thriving, and incentives have not just come back, but continue to grow. More importantly, meetings are playing a central role in the revenue and brand equations for corporations and associations.

While the events of ten years ago are interesting to reflect upon, the events of the last twelve months are equally interesting. Consolidation across hotel and technology suppliers continues, driving shifts in choice and putting increased pressure on meeting owners and planners. Equally, we see the rise of new players and independents who are leveraging technology to gain a competitive advantage in this increasingly consolidated environment. It makes for an interesting dynamic that is allowing us collectively to make forward strides against some long-term challenges in the industry, including live inventory for small and simple meetings, and increased opportunities for attendee engagement.



ISSA JOUANEH,

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

Globally, respondents indicate meetings activity is increasing along with modest increases in budget; however, expenses including hotel rates and airfare are expected to increase as well. This dynamic creates a continued need for meeting owners to clearly articulate their desired outcomes for meetings so budget is allocated to items that directly support meeting goals when tough choices need to be made during the planning process.

Technology continues to transform the meetings and events industry. Planners need it. Attendees demand it. The continued advancements in areas such as the application of robotics and artificial intelligence, facial recognition, and virtual reality are exciting. These technologies are bringing to meetings what many attendees already use and experience in their daily lives, making meeting experiences more immersive and exciting, while increasing the ability for meeting owners to achieve their meeting goals.

Whether inspired by the current budget dynamics, technology, or by the increased importance meetings play in achieving organization goals, the focus on attendee experience is intensifying. This is fantastic news for meeting attendees and meeting owners alike as both come to a meeting with desired outcomes in mind. Meetings that are focused in content, with technology elements, and an agenda that is designed with the end in mind will continue to elevate meetings as a business enabler.

Whether inspired by the current budget dynamics, technology, or by the increased importance meetings play in achieving organization goals, the focus on attendee experience is intensifying.

Compliance and privacy concerns continue to be top of mind and growing in importance with meeting owners. The General Data Protection Regulation (GDPR) has brought data management and privacy to the forefront this year, and seems to be driving more attention to meetings management in an effort to comply with the regulation that reaches far beyond Europe. Globally, planners indicated designated oversight is the most difficult aspect of GDPR for their organizations to comply with. Overwhelmingly, survey respondents agree that GDPR is impacting the industry.

The regional perspective is optimistic, reflecting the overall industry sentiment. Planners in North America are paying close attention to the increase in meetings activity, while increasing their focus on delivering optimal attendee experiences. Respondents in this region clearly prioritized improving the attendee experience when asked where they would put any increase in investment that may come their way. Additionally, reflecting a very strong jobs market, respondents in North America indicated that internal meetings would continue to grow in 2019 as companies work to onboard and train new employees.

Across Europe we are seeing more widespread and consistent growth than in the past, however, rising meeting costs are outpacing the increase in meeting spend. Spain and Germany are leading Europe relative to growth in meetings activity and numbers of attendees. Across Europe, more companies are creating managed meetings programs to address growing cost and compliance concerns.

Optimism continues in the Asia Pacific region with growth predicted for 2019. This growth is balanced with increases in meeting costs, which are predicted to rise at a higher rate than spend creating the need to maximize every available meeting dollar. Increased interest in measuring return on meetings spend and managing the investment in meetings has more companies looking at strategic programs, particularly in Australia.

Central / South America is an area that is experiencing growing interest from meeting professionals, and the anticipated increases in number and length of events in the region reflects this sentiment. This growth is accompanied by increasing adoption of meetings technology in the region, giving increased ability to effectively track and manage meetings spend and activity. Conferences and tradeshow are also showing increasing interest in some countries within the region, taking advantage of facilities built for recent global sporting events, and perhaps working to attract attendees with new destinations.

Our 2019 Forecast special sections look at three distinctly different areas within meetings and events. *The Future of Personalisation* from our team at Banks Sadler delivers important insight into how we can improve the attendee experience by infusing unique and personal experiences into meetings. Enabled by technology, personalization is more achievable than ever before. *Meetings Legal Trends* looks at the key legal issues meeting owners need to consider in the current environment including changing contract terms and conditions, and the impact of the General Data Protection Regulation. Finally, the *Latin America Destination Report*, produced in partnership with IBTM Americas, delivers the perceptions, intentions, and importance of personal experience when it comes to planning meetings in the top five meetings cities in Latin America.

While dynamic and ever-changing, the meetings industry has bounced back from the recession a decade ago, experiencing years of consistent growth and settling into a new normal. We see corporations working to create global visibility for their meetings and events investments. This global mindset is elevating meetings and increasing the management discipline, while highlighting the sensitivity to local requirements and service configurations. At the same time, the continued focus on the attendee experience and desired outcomes for meetings indicates meetings are being purposefully designed and executed, and cementing their place as drivers of business outcomes.

It is an exciting time to be in the meetings and events industry.

Regards,

Issa Jouaneh

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

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Meet with Purpose flower arranging program, Philadelphia, PA

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SECTION 1

Global Meeting Activity



2019 Global Meeting Activity

A Fresh Design

For those who look forward to this publication every year, the American Express Meetings & Events Global Meetings Forecast looks different for 2019. We've streamlined the content to be more accessible and created stand-alone sections so you can find information relevant to you quickly and easily. Each section is accompanied by an infographic summarizing key highlights, giving you an overview to share with peers and stakeholders. Finally, we've moved the comprehensive data tables to an appendix, giving you the ability to reference specific data without compromising the readability of the report. We hope you enjoy the new format.

A Global Perspective

To create this forecast of the 2019 global meetings industry we surveyed over 700 meetings and events professionals around the world and conducted interviews with 30 industry experts who shared their own perspectives for 2019. Respondents represent corporations and associations, buyers and suppliers, across the global network of the people who do the work of the industry. The results are based on input from organizations of all sizes, across five continents and thirty-three countries. The result is a statistically and globally representative picture of the 2019 meetings and events industry.

Meetings Activity

A decade after the beginning of the Great Recession, the meetings industry is settling into a new normal. Our global survey shows planners in many regions are planning more meetings, for more attendees and of longer duration. It is a story of a mature industry with expectations for incremental growth for meeting numbers, duration, and attendees – consistent across meeting types and regions. Planners are being asked to deliver ever-more-engaging events within budgets that aren't increasing as quickly as expectations for execution, meaning new strategies must be crafted to optimize design while managing expenses. It is a time of great opportunity for the global meetings industry. Milton Rivera, Vice President, Global Business Development and Strategy, American Express Meetings & Events observes, "With activity and investment growing,

GLOBAL ACTIVITY:

Optimism, Tempered by Reality

Planners and hoteliers see a bright future even as funding for meetings undergoes a significant shift

Source: American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018



IT'S GOING TO BE BUSY IN 2019

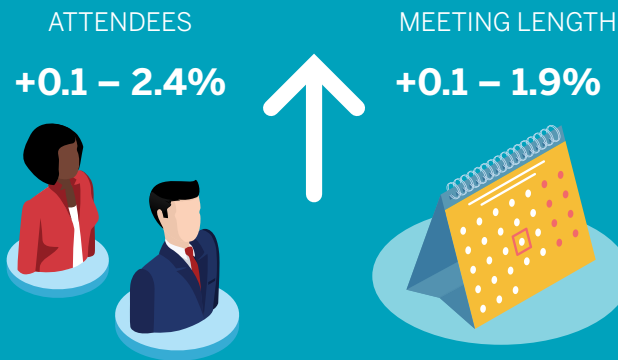
Meetings activity will **increase** across virtually all types of meetings and regions.

MEETINGS ACTIVITY HIGHLIGHTS



AND MORE CROWDED...

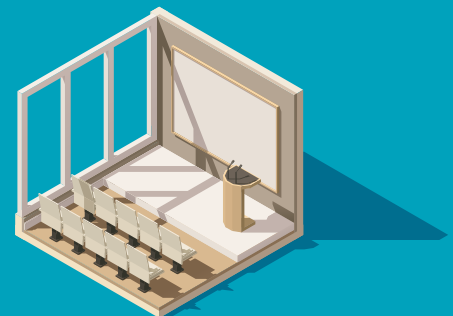
Meetings are expected to be both **bigger** and **longer**



IS THERE ROOM FOR EVERYONE?

Planners and hoteliers **differ** in their perspectives regarding availability

EXPECTED INCREASE IN 2019 SPACE AVAILABILITY



CONSIDER THESE OPTIONS...

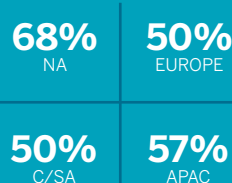
For the second year, Dubai leads the world in new property openings for 2019. Nashville and **Shanghai** are new to the top 5.

City Name	# of Hotel Openings
Dubai	54
New York	32
London	28
Shanghai	22
Nashville	20



BUT PAYING MAY BECOME A CHALLENGE

Planners across regions say they are working with smaller commission pools from which to **fund** their meetings.



Top Impact of Hotel Consolidations/Mergers
Percent of Planners Saying Lower Commission Rates

planners will need to rise to meet two key challenges. The first is to quantify the value they are providing to the organization. This doesn't necessarily mean measuring ROI, but they will need to demonstrate they are delivering against the objectives of the meetings they are managing. Second, they need to make sure they are engaging an increasingly diverse set of attendees in their meetings and content. Meetings are dynamic, as are audiences. These are not easy challenges."

Meeting Prevalence

Note: We made some updates to our survey this year, including a simplification of the meeting types into fewer (broader) categories.

Among the myriad of meetings held daily around the globe, the most common are internal team meetings, including employee training. In Europe, Asia Pacific, and Central and South America, these account for about a quarter of all meetings. In North America, where they are the most prevalent, they account for 30%. With activity already high for these meetings, planners across regions have different outlooks for what to expect in 2019. Those in North America expect continued modest increases in the number of internal meetings next year, and planners in Europe expect slight increases. Respondents in Central and South America see the number of internal meetings remaining flat, while those in Asia Pacific anticipate a modest decrease in the number of these meetings.

Increased meeting activity is the theme across the remaining categories and regions - only in two other areas are the number of meetings expected to remain flat. Planners in Central and South America anticipate product launches will stay the same, while those in Asia Pacific report Senior Leadership and Board meetings will remain flat. Growth is anticipated for all other meeting types across all regions.

In three regions - North America, Europe, and Central and South America - the most pronounced increases are expected for customer advisory board meetings (between 1.3% and 1.9%). Planners in North America expect product launches and senior leadership meetings to increase by more than 1% as well. Respondents in Central and South America are expecting an increase of 1.8% in the number of incentives and special events and a 1.4% rise in the number of conferences and tradeshows, while planners in Europe are expecting 1.2% more product launches. Planners in Asia Pacific are the most circumspect in their outlook with growth expectations under 1% across all meeting types.

Meeting Attendees

Expanding Audiences

It is not just the number of meetings that is expected to grow in 2019. Meeting planners across the globe expect small, but meaningful, increases in the number of attendees at their events. The biggest increases are those expected by planners in Central and South America, where customer advisory board attendance and incentive attendance are expected to increase by more than 2% and the smallest anticipated increase is a 0.9% rise in attendance for internal meetings. Planners in North America and Europe

expect attendance increases across all meetings, while those in Asia Pacific expect only internal meetings to remain flat.

The global hoteliers we interviewed agree with these predictions. These respondents, with their broad perspective of the meetings industry, are expecting attendance increases of over 2% for conferences and tradeshow as well as incentives. They have more moderate growth expectations for attendance at other types of meetings, from 0.94% for attendees of internal meetings to 1.4% for product meeting attendees. Their assessment is a strong confirmation of the projections offered by meeting planners we surveyed.

Meeting Length

A Little Extra Time

The theme of small, but meaningful increases in 2019 applies to meeting lengths, as well. Respondents in North America expect product launches, incentives, customer advisory boards, and senior leadership meetings to be a little longer next year. Planners in Europe expect all meetings except internal team meetings to be longer. Respondents in Central and South America anticipate all meeting types to increase in length next year, especially conferences and tradeshow (1.4% longer) and incentives (1.9% longer). In Asia Pacific, only internal meetings and product launches are expected to remain the same length – all other meetings are anticipated to lengthen somewhat.

As with expected changes in attendance, global hoteliers agree with the assessments of meeting planners regarding the increasing length of most meetings. Hoteliers anticipate a small decrease in the length of internal meetings (-0.78%), but all other categories are expected to increase in length. From the perspective of these suppliers, product meetings and incentives and special events will exhibit the highest growth (1% and 0.83%, respectively), while conferences and tradeshow, senior leadership, and advisory meetings will be between 0.67% and 0.78% longer.

Cost Per Attendee

Survey Changes

For the 2019 Forecast, the cost-per-attendee survey question was changed to more accurately represent marketplace realities. Ranges for cost per attendee were expanded to ensure capture of higher spend levels. This change results in a large increase in cost-per-attendee estimates compared to last year's Forecast. These changes are most likely the result of the scale changes and should not be used to understand investment increases from 2018 to 2019. For that information, the expected change data should be used.

Per-Attendee Spend

Respondents in Central and South America and Asia Pacific tend to have the highest per-attendee budgets, across all meetings categories, while planners in North America and Europe report lower per-attendee budgets by category. Incentives, which is the

most expensive meeting type in all four regions, carries a cost per attendee of \$2,070 in Central and South America and \$1,957 in Asia Pacific, compared to \$1,679 in North America and \$1,590 in Europe. At the lower end of the spectrum, internal team and training meetings cost \$1,004 in Europe, \$1,259 in North America, \$1,394 in Central and South America, and \$1,576 in Asia Pacific. The spending differential is considerable – the highest per-attendee spend in Europe is equivalent to the lowest per-attendee spend in Asia Pacific.

Growing Costs

Not only are per-attendee costs higher in Asia Pacific and Central and South America, planners in those two regions are expecting increases over 1% across all meetings except for internal and senior leadership meetings. Planners in Europe, on the other hand, anticipate smaller changes across the board, except for advisory meetings, which will see a cost-per-attendee increase just over 1%. Respondents in North America have moderate expectations for cost increases across all meeting categories, with incentives the highest at a 1.08% increase.

Experience, Delivered

Amidst the infinite details, decisions, and priorities planners face, there remains a constant focus on delivering the optimal attendee experience. Planners are constantly called upon to make trade-offs within the constraints and requirements of their meetings. The ultimate goal is to deliver the best attendee experience within the budget and logistical parameters planners are given. When asked what they would do if their funding increased by 10%, the most common response from planners was “improve the onsite experience.” As Issa Jouaneh, Senior Vice President and General Manager, American Express Meetings & Events notes, “As the economy continues to prosper, there is certainly a desire to invest in meetings and events, and more in the attendee experience to drive engagement, loyalty, and at the most basic level, attendance. Depending on the meeting type, people have choices as to whether they will attend. Once the choice is made to attend, the level of attendee engagement is directly

“With more event choices than ever, the attendee experience has become a differentiator and a key driver in achieving the meeting or event objectives.”

correlated with the experience. With more event choices than ever, the attendee experience has become a differentiator and a key driver in achieving the meeting or event objectives.”

Another industry expert offers insight as to how all the logistics and details come together to create a critical outcome for the meeting organizer. Linda McNairy, Vice President, Global Operations and Shared Services, American Express Meetings & Events says, “There is a lot of focus on the meeting attendee. For the individual attending the meeting or event, we want the best possible experience for them, so that they are in the right frame of mind, they have a positive mindset, and when they’re experiencing that meeting or event, they’re able to consume the content in terms of education or knowledge share, as well as the overall experience of the event. And if the logistics around it have been facilitated in the most seamless way possible, then they’re

in a better mindset to be able to fully maximize the content and the experience of the event.”

Survey respondents also commented on this dynamic, viewing the delivery of an optimal attendee experience as both a challenge and an opportunity.

- It's very difficult to manage a shifting organizational culture with a younger millennial attendee who isn't satisfied with a “typical” venue or hotel. There is a rising preference for independent, quirky, unique venues that often don't offer commission and will not negotiate T&Cs.
- We are most excited about the opportunities emerging technologies will provide to improve participant engagement and communication.

It's not just meeting planners - hoteliers are feeling the pressure as well. As one professional noted, “Hotels and venues are really working to adapt to the new generation. If they don't, they will no longer be successful. Technology is changing quickly, and the generations are also changing very quickly. Companies are different. They've become a lot more demanding. They have higher expectations. And all these elements play a significant role in the overall selection of venues or hotels or destinations.”

Overall Meeting Spend

The Bottom Line

With the small-but-real increases across so many factors – number and length of meetings, attendance, and cost per attendee, it is reasonable to anticipate a corresponding increase in the overall meetings spend. Our survey results indicate spend expectations are not increasing at the same rate as costs. While North America and Asia Pacific expect moderate increases in budget (less than 1%), planners in Central and South America anticipate no change in meetings spend while planners in Europe actually expect a small decrease in budget, with a -.065% contraction.

Even for the most optimistic regions, the math presents a challenge for planners. With expanding scope and resulting costs, it will take a keen focus on desired outcomes to deliver the right attendee experience within budget. This is something planners spoke about when asked about their most significant challenges. As one survey respondent offered, “Our budget will not increase, but we need to keep everything the same – or even better.”

Yma Sherry, Vice President, North America, American Express Meetings & Events provided some perspective regarding how planners are trying to cope with these pressures. “Overall, costs are increasing as demand continues to outpace supply. Meeting planners are trying to find ways, as always, to do more with less. They are focusing on their attendees. Are the right people attending? Should they reduce the number of attendees? In certain cases, they're using virtual technology for the general sessions, broadcasting the meeting to the people who were unable to attend the meeting live.”

An additional aspect of this challenge is that commissions from hotels, which are usually a considerable part of the “spend pool” from which planners can draw to fund other aspects of an event, are being reduced or eliminated at the same time planners are faced with improbable budget requirements.

Hotels & Meeting Space

Mixed Predictions for 2019, Space Increasing in 2020

Planners expect hotel space availability to be flat going into 2019, making events with short lead-times problematic for planners. Europe is the exception, with planners anticipating a 0.7% increase in space availability for next year. Planners in the Americas and Asia Pacific report no increase in space availability. Fortunately, the outlook for 2020 is better, with more space availability consistently expected across regions.

With this flat availability for 2019, planners anticipate a corresponding increase in group hotel rates. This statistic is highest in North America, at 2.41%, followed by Europe at 1.61%. Planners in Asia Pacific and Central and South America anticipate increases closer to 1%.

Hoteliers offer a different opinion than planners, indicating space availability is not flat in 2019 – it’s actually increasing by an expected 2.2% globally. They do acknowledge rate increases in a range similar to planners – 2.29% higher in 2019 compared to 2018.

Mid-tier Reigns for Larger Meetings

Looking toward 2019, planners across all regions agree that their preferred properties fall in the mid-tier category; planners in Europe and North America indicate almost half their total meetings will use mid-tier properties. Respondents who are hotel

Respondents across the globe noted the increasing interest in unique properties and brands. Hotels are investing heavily in new boutique properties geared specifically toward capturing the attention of younger audiences.

professionals indicate they see demand increasing the most for this segment – up 3.2% in 2019. And while the use of non-traditional meetings facilities is between 10% and 20% across regions, it is a property type that is growing quickly, with our global hotelier respondents estimating a 2.7% increase in demand in 2019.

Unique a Good Fit for Smaller Meetings

Respondents across the globe noted the increasing interest in unique properties and brands. Hotels are investing heavily in new boutique properties geared specifically toward capturing the attention of younger audiences. Rolf Schmidt, CEO of TOPHOTELPROJECTS notes, “The trend we see is that the big hoteliers are trying to develop new types and styles of brands. Week by week, we get a new brand from any one of the big groups. They are trying to adapt better to specific audiences, trying

to become more modern, fancy, edgy, and move away from the ‘old-fashioned’ core brands. It’s how they get investors interested. The challenge is these properties are emphasizing accommodations, not meeting space, so they are not able to meet the needs of planners.”

Another meetings professional agrees, “The boutique hotels can be a compelling option for smaller meetings. Their meeting space may be really unique – cozy, with more natural light. But larger meetings have to go where the meeting space is available.”

Travelers, New Properties Increasing Worldwide

With their increasing demand for space, planners should appreciate the rate at which new properties are opening. According to data from TOPHOTELPROJECTS, a total of 2,349 properties in the mid-scale to luxury segment are expected to open next year, up 159 over 2018. The most prolific expansion is happening in Asia Pacific (764 openings), Europe (655), and North and Central America (563). Construction of new properties is well-positioned to address the rising demand for mid-tier properties. North and Central America has seen a rise in mid-to-luxury property construction ratio, with 3.3 mid-tier hotels for every luxury property under construction. Europe is also seeing aggressive expansion of the mid-tier segment with a 3.2 ratio. South America is building 2.5 mid-tiers for every new luxury property, while Asia Pacific has more balanced ratios of 1.2.

Mr. Schmidt explains, “The number of accommodations is increasing worldwide. It varies by country because some have to focus on upgrading and refurbishing to get to a level of quality. But the number of rooms worldwide is increasing continuously. If you look at international travel statistics, you see that it is increasing between 4% and 5% a year, so there is urgent need to offer accommodation to those travelers.”

Some Shifts in Top Cities

The top cities for new hotel openings will see some shifts in 2019. In North America, New York (32 properties opening) and Nashville (20) hold on to the top two spots, but Los Angeles replaces Chicago for number three (16 openings in 2019). In Europe, London and Munich remain in the top three, but Hamburg is replaced by Dublin, where 13 new properties will open in 2019. The three top cities in Asia Pacific are all in China, with 53 hotels opening among them in 2019: Shanghai, Chengdu, and Sanya. In South America, Lima, Mendoza, and São Paulo top the list.

Strong Preference for Negotiating Amenities

As the hoteliers we surveyed look forward to 2019, they anticipate shifting strategies for negotiations with meeting planners. Hotel respondents say they are becoming less willing to negotiate on audio/visual and Wi-Fi than in years past, and instead have a strong preference for offering free or upgraded amenities (94%). Willingness to negotiate on room fees remains high at 88%, while interest in reducing resort fees is low at 38%.

Change in Commissions Making a Big Impact

On this year's survey, one question showed a dramatic change over prior iterations of the Global Meetings and Events Forecast. Every year, meeting planners are asked how hotel mergers and consolidation impact their jobs. Typically, the responses center around the increased challenges of contract negotiation and changes to contractual terms and conditions. With this year's survey, lower commission rates jumped dramatically. Last year only 14% of planners in North America were concerned with this item, compared to 68% this year. In every region at least 50% of meeting planners surveyed are concerned about the changing commission structure in the industry.

Meeting planners report this change presents real difficulties for them. Commissions are used by many organizations to fund meetings. Without this budget to work with, planners are feeling additional pressure of increasing their meetings activity as they watch one of their critical funding sources diminish. Issa Jouaneh, Senior Vice President and General Manager, American Express Meetings & Events observes, "The change in commission structure has certainly increased the cost for our clients to operate and deliver meetings and events. At the end of the day, there's no question that for planners this increases the importance of relationships, partnerships, and the ability to direct business to suppliers that offer flexibility and value partnership."

Global Air

Across-the-Board Increases in Capacity and Costs

As with most other budget line items, group air costs are expected to increase in 2019. Planners in Asia Pacific expect the lowest increase of 1%. Planners in Europe and the Americas anticipate increases around 2%, while group air specialists and air suppliers expect that increase to be higher – 2.6%. Air professionals report that regional increases in air rates will likely be more significant for international fares, as well as regional fares in North America, Eastern Europe, and the Middle East.

Expectations for capacity and volume are also high. Air specialists anticipate across-the-board increases in capacity, from 0.92% in Africa to 2.2% in Eastern Europe. Anticipated growth in volume is 3% or higher for North and Central America as well as Eastern Europe, and over 2% for many other regions. With volume increasing faster than capacity, planners may be faced with the additional challenges of higher fares and decreased availability.

Norma Dean, Director Delta Specialty Sales, Delta Air Lines, notes how airlines must step into opportunities to serve and add value to their corporate clients. "We don't think in terms of meeting type, necessarily. We understand that corporate clients will need long-haul air for incentives and board meetings, where premium experiences and exclusivity matter. Associations are more focused on value and volume-driven pricing. We have to find the ability to serve both needs and be great partners to all of our clients."

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This isn't just flying...this is the Emirates A380



Global Trends



2019 Global Trends

Destination Selection

Priorities Vary by Region

When considering destinations for their meetings, planners in Europe and North America prioritize those that can offer the specific property type needed with easy air lift and transportation to the location. In Central and South America, considerations are different, and respondents indicate economic/political stability and currency/exchange rate as their top two factors when selecting a destination. In Asia Pacific, planners are also concerned about economic and political stability, but referrals and recommendations from colleagues play a significant role as well.

A meeting professional in Asia Pacific observed, “Budget-conscious companies are being very selective about their events – truly working to maximize their investment. They are analyzing fly-in and fly-out dates and choosing destinations based on accessibility by airline. We are seeing airline analysis in proposals to help companies avoid having attendees stay one extra night.”

José Miguel Moreno, Vice President, Global B2B Sales Strategy for Melia Hotels explains the complex variables planners must consider when selecting a destination for their event. “The main factors for destination selection include security – perhaps in terms of terrorism or even labor conflicts – a stable political situation, good weather conditions, easy air connectivity, excellent service, and a great property. All of those considerations are critical for meetings and events.”

Meeting Approvals

Incentives and Special Events Most Difficult

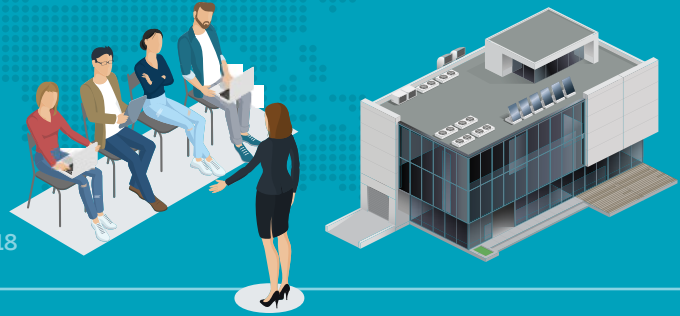
When it comes to getting meetings approved, respondents around the globe agree. Internal team and training meetings are the easiest to get approved, while incentives and special events are the most difficult to get approval for. Planners in Asia Pacific indicate that conferences and tradeshow can also be difficult in terms of approval. Approval processes appear to emphasize effectiveness of spend rather than reducing

GLOBAL TRENDS:

Evolving Experiences, Exciting Innovations

The industry is continuing to evolve as planners find new ways to optimize design and execution.

Source: American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018



CONVENIENT, SAFE, PROVEN LOCATIONS

Planners **prioritize** different factors when selecting their meeting locations

North America



PROPERTY TYPE



AIR LIFT & ACCESS

Europe

Central South America



CURRENCY/EXCHANGE RATES



ECONOMIC/ POLITICAL STABILITY

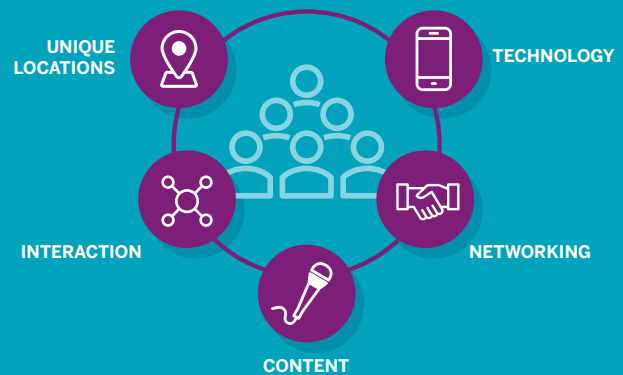
Asia Pacific



REFERRAL

AN UNCOMPROMISING EXPERIENCE

Engaging participants is seen as the key to an optimal outcome. Planners are considering all **aspects** of an event



THEY SAID IT:

“We want the best possible experience for the attendee, so they have a positive mindset, and are able to consume the content or knowledge share of the event.”

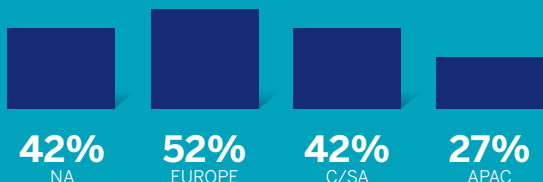
– Meeting Professional from North America

DRIVEN BY A STRATEGIC POLICY

Increases in activity, costs, and expectations are leading planners to more explicit **strategies** for managing meetings across the enterprise.



Percentage of planners with explicitly defined meeting policy in place:



AND ENHANCED BY TECHNOLOGY

Keeping pace with the volume of **solutions** available to planners can be overwhelming at times.

THEY SAID IT:

“In the last 18 months, there has been an explosion of technology emerge for every part of the end-to-end meetings and events process.”

– Meeting Professional from Europe

the number of meetings. As one meeting professional remarked, “There is a lot of focus on savings and, increasingly, companies need a way to report and bank the savings on a quarterly basis. This is how they’re demonstrating good financial management.”

Incentive Attendee Guests

With incentives and special events considered the most difficult meetings to get approved in every region and the relatively high cost per attendee for these events, considerations regarding the attendee list are critical for planners. In North America, planners are split – 47% allow attendees to bring a “plus one” on an incentive while 44% invite the main attendee only. In Europe, Central and South America, and Asia Pacific, approaches are more definitive. For most planners in those regions, incentive attendance is limited to the main attendee, with no “plus one” invited.

Attendee Experience

The Engagement Frontier

With the industry stable and activity and spend growing, meetings professionals are looking beyond execution toward a more ambitious goal – optimizing the meeting experience for every person in attendance. For respondents, the key benefit of a well-designed and executed attendee experience is directly related to the meeting outcome. “An optimal experience effectively primes the attendee to get the absolute most out of the meeting,” said hotelier Christine Lawson, SVP Sales, Loews Hotels & Co. “It’s really about the experience and tailoring that experience for the individual client and their attendees. At Loews, we are committed to handcrafting the meetings experiences we offer. We partner both internally and with our customers to ensure we are providing the right environment that actually fuels the attendees’ mind, body and spirit so that the meeting objectives are met and that we have in return exceeded the customers’ expectations as well.”

A meeting professional in Germany adds, “The goal is to reach out and really engage the audience. That means people are not just listeners, they are completely integrated into the event. There needs to be plenty of opportunity for them to give feedback, raise ideas, and have virtual and live options to come together with ideas. It’s how the space is set up, how you use technology, how you design the sessions, and the venues you choose.”

Planners are exploring a range of strategies to engage participants in their meetings. Some are working to engage the younger demographic groups by hosting meetings at unique properties. With the rise of boutique hotels, there is more opportunity (and demand) to hold meetings at smaller, more “interesting” properties. Rolf Schmidt, CEO, TOPHOTELPROJECTS, believes hoteliers can do better in designing properties well-suited for this demand. “I’m convinced that the hotel operators miss opportunities in offering interesting meeting facilities. It is a major issue to find interesting facilities in big cities. You have to look for meeting facilities which are not associated with hotels. Then you’re transferring attendees offsite, working with catering companies, etc. The hospitality industry is missing a lot of business they could win by offering more compelling meeting spaces.”

Communication design is also critical to engaging younger audiences. Planners are striving for paperless events, elegant and user-friendly mobile apps, and a technology strategy that optimizes the engagement of the attendee, no matter their age. As one meeting professional notes, “Companies want more and more sophisticated choices with interactive technology at a meeting. We take the time for every event to really think about the purpose of that technology and how we can best utilize it, rather than implementing an ‘instant-app’ or standardized interactive technology. We really tailor it to what they are trying to achieve with attendees.”

Meetings Technology

Powering the Experience

The use of virtual meeting technology to facilitate the participation of those not able to attend in person is most prevalent in Asia Pacific and Central and South America. Planners in those regions note that financial considerations make virtual attendance an attractive option, but face-to-face meetings will continue to be preferred as the optimal means of engaging attendees.

It is critical that the meetings industry continue to invest in updating and innovating with technology. As Linda McNairy, Vice President, Global Operations and Shared Services, American Express Meetings & Events observes, “We are talking about the consumerization of technology. We need to create within a meetings and events environment the same experience that meeting attendees and owners are able to achieve within their personal lives. We need to continue to drive for a more seamless and consumer-type experience for the meeting attendee and owner.”

Technology providers will continue to emerge, focused on smaller and more specific aspects of meeting planning and execution. As Milton Rivera, Vice President, Business Development and Strategy, American Express Meetings & Events observes, “In the last 18 months, there has been an explosion of technology emerge for every part of the end-to-end meetings and events process. From the time an attendee leaves their doorstep to the time they return from the meeting, there are technology solutions for very specific things – nutritional information for the event menus, or aggregate ground transportation, for example. It’s extremely fragmented and can be overwhelming for planners to have to navigate.”

Ms. McNairy adds that with so many technologies and technology providers emerging on virtually a daily basis, it can become overwhelming for meeting professionals to navigate and manage this vast ocean of possibilities. She added, “To address this challenge, we are launching the Meetings Marketplace, which is fulfilling our vision of intelligently applying the best technologies to strategically support a meetings program. We find the best in class, whatever the technology category might be – mobile apps, facial recognition, virtual reality, AI, robotics, online sourcing – and provide a common platform for our clients. What we hear from businesses is that they are simply overwhelmed with the volume of solutions available and trying to figure out how to evaluate and partner with the right ones. We are able to remove that burden and help companies solve for their unique needs and demands using a known roster of providers.”

Mobile App Value Expanding

The use of mobile apps to support meetings continues to rise around the world. Planners in North America anticipate a nearly 3% increase in mobile app use in 2019, lower only than the global hotelier respondents, who project a 3.4% increase. Planners in Central and South America expect a 2.4% increase while those in Asia Pacific and Europe anticipate increases of 2.1% and 1.8% respectively.

In terms of the most compelling benefits of using a mobile app for their meetings, there are marked differences in regional perspective. Planners in North America and Europe have similar outlooks, citing the sharing of agendas and the ability to use the app to send messages or reminders to attendees as paramount benefits. In addition to the positives noted by planners in North America and Europe, respondents in Central and South America like that apps allow attendees to take session notes and allow planners to better track and benefit from event analytics. Respondents in Asia Pacific have not reached a shared understanding of the benefits of apps – only the use of apps for agendas achieves a level of consensus in terms of a business benefit.

In areas where apps have become a standard component of a large meeting or event, the expectations of value beyond tactical event communication are increasing rapidly. Lawrence Coburn, CEO, DoubleDutch shares his perspective. “One of the macro trends that our most sophisticated customers are driving is around the integration of systems. Our customers are increasingly demanding that, particularly for external events, data

“Our customers are increasingly demanding that, particularly for external events, data captured by the mobile app is then piped into their marketing automation and CRM systems.”

captured by the mobile app is then piped into their marketing automation and CRM systems. While customers have always liked the idea of using live event data to inform other business systems, few were executing it in practice. These sorts of integrations have now become a condition of working with us and a requirement for us to win business. It's a sea change in the industry.”

Meetings Management

Environment Primed for Strategic Meetings Management

Increasing meeting activities and costs, reduced or eliminated commissions, and expectations for investing in design that delivers high attendee engagement have combined to create an environment primed for strategic meetings management. Planners new to the discipline have begun embracing the tenets of transparency, policy, and management of meetings activity to maximize their budgets and minimize waste and redundancy. Mr. Rivera explains, “Strategic meetings management is simply that – managing your meetings strategically. Some people get overwhelmed if they think of it in its fully mature state, but it's not meant to operate that way for every company. The question is, do you want to manage your meetings strategically simply to know

where your spend is going and that it's working for you? Then construct what you're comfortable with to achieve your goals."

Planners in North America and Europe have focused more efforts on implementing strategic meetings management programs than have their counterparts in Asia Pacific and Central and South America. About 60% to 80% of respondents in North America and Europe indicate having core meeting management components in place, with explicit definition in place for about 40% to 55%. In Asia Pacific and Central and South America, 44% to 68% have meeting management components in place, with 20% to 45% having explicitly defined policies governing the planning and execution of meetings.

The recent implementation of the General Data Protection Regulation (GDPR) requirements for European attendees may accelerate adoption of some meetings management policies. Mr. Coburn of DoubleDutch has seen significant changes in how companies are dealing with the underlying tenets of GDPR. "The single biggest trend we are seeing is intensification around how event owners approach data security and attendee privacy. This is being driven by GDPR, which we are finding has really long tentacles beyond Europe. Every event planner now has to be an expert on GDPR. What we are hearing from large clients is they have decided to comply with GDPR globally, because they don't have the bandwidth to create two different workflows – one for European citizens and one for everyone else. What's happened is that GDPR is now, effectively, a global law. Everyone is extremely stressed out because the fines are so enormous and no one knows how the law is going to be enforced. Everyone is waiting to see if there are companies that will be made examples of."

Survey respondents agree that GDPR is impacting the meetings industry. Half of the respondents in Europe agree that it is challenging to meet the GDPR requirement for centralized data management, and just under 45% feel that the requirements of consent and designated oversight are difficult for their organization to comply with. Planners in Asia Pacific and Central/South America feel similarly, rating designated oversight the most challenging aspect of GDPR (58% and 56%). Planners in North America, perhaps because adoption of strategic management protocols is stronger, feel somewhat less concerned about compliance, with less than a third indicating that the three requirements are a challenge.

Meetings management is emerging as a strategy for planners in the Asia Pacific region, driven primarily by efforts to be budget conscious while continuing to deliver exceptional experiences. As one regional professional noted, "In Australia we are seeing a lot more engagement and involvement from procurement teams in regard to the consolidation of meetings programs. It's a function of wanting more for less and expecting that from all of the suppliers in the chain." Mr. Coburn agrees that managing suppliers is a huge consideration for companies implementing strategic meetings management, and notes that GDPR is also driving consolidation of providers to help companies reduce risk and manage compliance. "Some companies in the pharmaceutical and financial services sectors are saying there is too much risk to use different vendors, particularly in the context of GDPR, so they are starting to simplify their vendor list. We are seeing a heavy push for consolidation of vendors across a broad meeting program."

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SECTION 3

Trends by Region



North America

Ten years after an economic recession threatened the global meetings and events industry, the meetings and events industry in North America appears to be healthy and robust. Bringing audiences together to share information, align attendees around a cause, or energize stakeholders continues to be a deeply ingrained business practice. Speculation during the past two economic downturns that virtual events would replace a considerable proportion of the face-to-face meetings activity (and thus reduce the cost of meeting) has never manifested. Virtual meeting capabilities remain an important component of a well-rounded meetings strategy, but continued growth of the industry supports that North Americans prefer to meet in person when possible.

Meetings Activity

Internal team and training meetings account for a considerable portion of the meetings volume in North America (30% overall). This is driven largely by the abundance of internal team and training meetings in the United States; there are nearly twice as many internal meetings as senior leadership/board meetings (the second-most-common meeting in the region). North American businesses are onboarding, training, and engaging their employees and using meetings to do so.

After a year of holding steady in terms of meeting activity levels, planners in North America are looking at 2019 with an eye toward growth. Across all meeting parameters we measured, survey respondents predict an increase in North America - number of meetings, attendees, days, and cost per attendee. However, planners anticipate relatively more growth will occur in the overall numbers of meetings and attendees; businesses are working to increase the reach of their meetings and events, engaging more attendees across more meetings.

Regionally, respondents predict the number of meetings will increase across all meeting types, with the most significant increases expected for client advisory boards (1.33%) and internal meetings (1.23%). Expectations of planners in the US and Canada

NORTH AMERICA:

A Shifting Paradigm

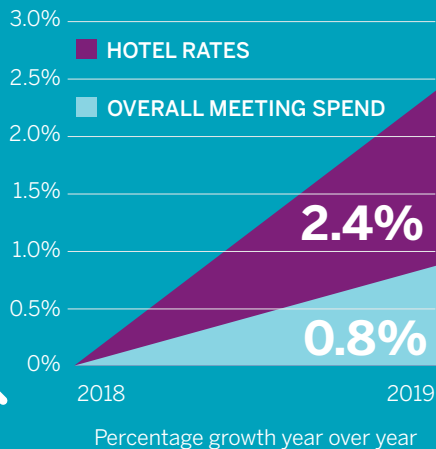


Planners are managing the competing demands of designing for optimal attendee experiences, budget constraints, and a fundamental change in funding.

Source: American Express Meetings & Events North American Survey, 2018

COSTS OUTPACING BUDGETS

Increases in spending are **not** expected to keep pace with rising meeting costs.



COULD LEAD TO SHORTER MEETINGS

Planners' top strategy for **managing costs** is to reduce meeting length.

20%

Would reduce the number of nights



FUNDING MODEL SHIFT

Over 2/3 of planners see **lower commissions** as the top impact of recent hotel mergers and acquisitions.

2018: **14%**

2019: **68%**



THEY SAID IT:

"The industry was built around the mechanics of commissions funding meeting programs. Meeting planners now have to think about how their meetings get funded. The market is still shifting, but it's going to create a new way of doing business for the meetings industry as a whole."

– Meeting Professional from North America

THEY SAID IT:

"The focus is on the meeting attendee. We need to create the best experience possible, so they're able to engage fully and realize the full benefit of the meeting."

– Meeting Professional from North America

DELIVERING AN OPTIMAL EXPERIENCE

If budgets increase, planners would invest in the **attendee**.

33%

IMPROVE EXPERIENCE



differ in the details –professionals in Canada expect the number of incentives and special events to grow most, while they anticipate a slight reduction in the number of internal meetings. Planners in the US see internal team and training meetings and customer advisory boards increasing most in 2019, with modest growth across all other types of meetings.

Yma Sherry, Vice President, North America, American Express Meetings & Events, offered her own observation of the growth of internal meetings, “We’re actually seeing more training meetings. The economy is doing better, and as a result, corporations are hiring more people and have an increased need for training.”

The number of attendees expected to attend meetings operated by planners in North America will be increasing as well, across all meeting types. Conferences and tradeshow, along with senior leadership and board meetings, are likely to post the lowest increases (but over 0.7% growth). Survey respondents predict all other North American meeting types will expand attendance over 1% in 2019. Planners in Canada expect product launches and incentives to grow the most in attendance – over 2% each. With internal meetings, however, meeting professionals in Canada expect attendance to be relatively flat, in keeping with the slight contraction we see in the anticipated number of internal meetings reported by this group. Planners in the US have strong expectations for meeting attendance, too. These respondents do expect internal meetings to grow in attendance (1.24%), along with healthy growth in other meeting types.

While increases in days per meeting are not expected to be as large as those for number of and attendance for meetings, meeting professionals in North America do anticipate increases in meeting length. Planners in Canada expect their meetings to increase in length more than planners in the US do, with the exception of internal meetings, which consistently show a slight decrease for Canadian firms as we head into 2019. Conferences and tradeshow are expected to remain stable regionally, although planners in Canada do expect more of an increase than planners in the US do (1.13% vs. 0.20% respectively). Canada’s outlook on incentives and special events is consistently positive, with expected increases in event lengths on top of the growth in event numbers and attendance.

Meetings Budgets and Planning

With a methodological change in the 2018 survey question, our estimates of cost per attendee are considerably higher than in prior years, with spend levels that better reflect the investments made in business meetings. Excluding air costs, planners in North America estimate the cost per attendee to be between \$1,200 and \$1,700 depending on the meeting type (internal meetings fall on the lower end while incentives spend is the highest). Planners in Canada estimate the cost per attendee higher across the board than do planners in the US. The biggest variances are in conferences and tradeshow, where Canada posts a \$1786 per-attendee spend compared to the US \$1,054, and incentives and special events, where Canada spends almost \$700 more per attendee than the US does.

It is not just the differences in real dollars that are significant between the two countries –respondents in Canada expect costs per attendee to increase more than their US

counterparts across all meetings. Interestingly, the largest expected increases for planners in Canada are in the incentives segment, where they are already spending an average \$2,213 per attendee (expected to increase 2.85% in 2019 compared to the US estimated increase of 0.61%). Planners in the US expect costs to increase consistently across all meeting types in 2019, but estimated increases fall at or below 0.7% compared to Canada's anticipated increases of well over 1% for most meeting types.

One of the areas survey respondents predict may drive cost increases is average daily rates for hotels, expected to increase by 2.41% regionally in 2019. Planners in the US are expecting room rates to increase by 2.66%, while their counterparts in Canada expect a more modest increase of 1.25%. With room rates driving a considerable proportion of the total meeting budget, the expected increase in room rates may be a driving factor in the new strategy for controlling costs. In the 2018 Global Meetings and Events Forecast,

The reduction or elimination of commissions by key hotel suppliers has profound implications for meetings that are partially funded through commissions.

meeting professionals in North America indicated the top strategy for managing meeting costs was reducing spend on offsite activities. Going into 2019, planners are more likely to look at reducing overall room nights to stay on budget – a strategy made more difficult with the anticipated increase in attendees and meeting length. Meeting professionals in North America, similar to their colleagues around the globe, have a strong preference for large metropolitan destinations for their meetings (71%).

Planners in North America point to the shifting commission agreements as another key driver of budget pressures. The reduction or elimination of commissions by key hotel suppliers has profound implications for meetings that are partially funded through commissions. As Milton Rivera, Vice President, Business Development and Strategy, American Express Meetings & Events noted, "It's changing the basic mechanics of the industry. Many companies fund their meetings through commissions programs. This shift is forcing all of us to think differently about how we manage and fund meetings programs."

When asked about overall meetings spend, planners in North America do anticipate having more funds to work with – a 0.8% expected increase regionally. However, planners in Canada are much less optimistic than their US counterparts, expecting spend to remain flat against the more considerable cost per attendee and overall activity increases they are expecting. Planners in the US expect a 0.91% increase in meetings spending – an increase more in line with expected cost per attendee increases, but which may not cover planned increases in overall activity.

Meeting Location

The list of top destinations for meetings and events in the United States has some material changes compared to prior years. Atlanta, Georgia, and San Diego, California, trade the 4th and 5th spots, while Washington, D.C., falls from 6th place to 9th. San

Francisco, California, is a new addition this year, replacing Phoenix, Arizona, in the number 10 spot. This is the first year we have reported top destinations in Canada.

United States

1. Orlando, Florida
2. Las Vegas, Nevada
3. Chicago, Illinois
4. San Diego, California
5. Atlanta, Georgia
6. Dallas, Texas
7. Nashville, Tennessee
8. New York, New York
9. Washington, D.C.
10. San Francisco, California

(Source: Cvent, 2018)

Canada

1. Toronto, Ontario
2. Vancouver, British Columbia
3. Montreal, Quebec
4. Calgary, Alberta
5. Ottawa, Ontario
6. Mississauga, Ontario
7. Banff, Alberta
8. Edmonton, Alberta
9. Whistler, British Columbia
10. Quebec City, Quebec

(Source: Cvent, 2018)



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Europe

The meetings and events industry in Europe, as in North America, looks robust and mature, with continued levels of meetings activity and widespread pockets of growth. European organizations have long embraced meetings as a means of furthering business goals. A decade after the beginning of the global recession, which severely challenged the meetings and events industry, planners in Europe appear to have settled into a healthy rhythm of robust activity with small year-over-year adjustments to address their organizational priorities. Faced with ever-increasing budget pressures and the emerging requirements of the General Data Protection Regulation (GDPR), planners in Europe are starting to embrace meetings management programs as a means of optimizing investments and ensuring regulatory compliance.

Meetings Activity

According to respondents in Europe, internal team and training meetings remain the most prevalent events in the region, driven by strong activity in the UK, France, and Spain (27-28% of total meetings). Germany is an exception here, with more activity expected in customer advisory board meetings (28%) than internal meetings (16%).

Meeting professionals in Europe are busy and are expecting to be even more so in 2019. Planners in Germany and Spain anticipate the highest increase in activity, with most types of meetings increasing in both numbers and attendees. Respondents in Belgium and the Netherlands, along with the United Kingdom and Poland, are also expecting increased activity in 2019. Meeting planners in France offer a more conservative outlook, anticipating decreased activity for conferences, tradeshow, and incentives and a flat or slightly negative change in attendance across all meetings.

The most growth in number of meetings is anticipated for customer advisory board meetings, which will show increases across all surveyed countries with the exception of France, where numbers are expected to remain flat. Product launch meetings are also expected to see an uptick, with considerable increases expected in Germany and Spain (4% and 3.5%, respectively). Internal team and training meetings are relatively flat across the markets. One meeting professional offered deeper perspective on the outlook for various types of meetings in Europe, “We’re finding that our clients are cost-cutting on nonessential internal meetings, but there’s still a huge appetite for the more important, content-driven larger meetings. They might not be doing a large global

EUROPE:

Widespread Growth



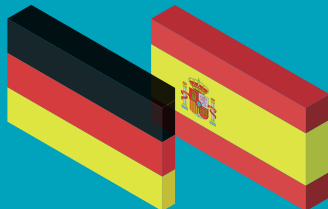
Meeting professionals are learning to navigate the new normal with high expectations and an expanding scope.

Source: American Express Meetings & Events European Survey, 2018



ACTIVITY INCREASING, WITH POCKETS OF FOCUS

Germany and Spain lead the way for meeting activity **growth** in Europe.



PRODUCT LAUNCHES

CUSTOMER ADVISORY BOARDS

	# Meetings	# Attendees	# Meetings	# Attendees
SPAIN	+3.5%	+3.1%	+2.6%	+1.7%
GERMANY	+4.0%	+1.0%	+1.9%	+3.0%

COST PER ATTENDEE

Regional cost per attendee is highest for incentives, and some countries are **big spenders**.

Germany, incentives: **\$2,194**



Spain, incentives: **\$2,156**

REGIONAL AVERAGES

Internal Team Meeting/Training: \$1,004
Incentive/Special Event: \$1,590

COSTS OUTPACING BUDGETS

Increases in spending are **not** expected to keep pace with rising meeting costs.



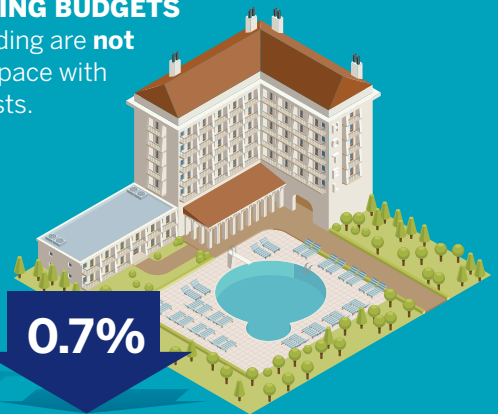
1.6%

HOTEL RATES



0.7%

OVERALL MEETING SPEND



BUDGET CHANGES = TOUGH DECISIONS

Here's how meeting planners would react if their **budgets** were:

CUT

20% would

REDUCE THE NUMBER OF NIGHTS

INCREASED

25% would

IMPROVE THE EXPERIENCE

25% would

HOLD MORE MEETINGS

THEY SAID IT:

"Planners are very, very focused on the details of what's driving costs – it's about managing expenses while maximizing the opportunity to engage attendees."

– Meeting Professional from Europe

or regional event anymore but smaller, local events. Everybody is reviewing the format and purpose of meetings again.”

Attendance is expected to increase for many European meetings, particularly incentives and customer advisory boards, which are both expected to have larger audiences in 2019. This finding is consistent across the European countries surveyed, with the exception of France, where planners expect attendance to remain flat for both meeting types, and Denmark and Sweden, which are expecting growth in attendance for customer advisory boards but not for incentives.

As planners are expecting to increase their reach by operating more meetings for more attendees, some are also anticipating these meetings to increase in length, allowing for more time for content, networking, and activities. This outlook varies considerably by country: survey respondents in Germany, Poland, and Switzerland anticipate adding to the length of most meeting types except internal team and training meetings, while planners in France, Spain, Denmark, and Sweden expect meeting lengths to remain flat, or even contract slightly.

Meetings Budget and Planning

The survey question addressing cost per attendee was updated in 2018 to better reflect current spending levels for meetings, and reported budgets validate this design change. Regionally, respondents predict cost per attendee ranges of \$1,000 for internal meetings and training to \$1,590 for incentives and special events. In fact, expected average per-attendee spend for the region clusters tightly between \$1,400 and \$1,590 – the per-attendee budget for internal meetings and training is an outlier.

However, closer inspection reveals that budgets do vary considerably by country. Planners in Spain, in particular, spend more per attendee, but planners in Germany and Poland also spend more than the European averages. Planners in Denmark and Sweden, along with France, spend relatively less than average across all meeting types, while planners in Switzerland, Belgium, the Netherlands, and the UK report spending in the median range.

The picture becomes even more dynamic when considering expected changes in cost per attendee in 2019. At the regional level, survey respondents expect costs to remain flat for internal meetings and show modest increases (between 0.5% and 1.02%) for all other meeting types. At a more detailed level, there are no consistent patterns either by country or by type of meeting – anticipated changes depend on both the country and meeting in question. Meeting professionals in France, Denmark, and Sweden expect costs to decrease somewhat across most meeting types in 2019. Planners in Belgium and the Netherlands report expected cost per attendee to increase more than the regional average across all meeting types, while planners in Switzerland report higher-than-average cost increases for all meeting types except conferences and tradeshow, which fall along regional averages.

Compounding the concerns about rising meetings costs is the expectation of increased group hotel rates – planners in Europe anticipate rates to increase by 1.61% in 2019. Planners in Germany and the UK are anticipating rate increases above 3% year-over-year, while planners in Denmark and Sweden are projecting rate increases

of 2.4%. With hotel rates accounting for a considerable portion of the budget, recent pressures on commissions previously used to offset overall meetings costs, and the ever-increasing focus on delivering exceptional attendee experiences, planners see how even minor cost increases across a long list of line items will present an ongoing challenge in the months ahead.

A UK meeting professional offers, “there is more scrutiny on the value of the meeting. It doesn’t necessarily mean that budgets are decreasing, but there is more scrutiny on how the budgets are being used – whether it is delivering the value it should for that meeting. Businesses are investing in external meetings and those that are heavily content driven.”

Two different respondents offered insights into how companies in Europe are undertaking the early steps in establishing meeting management protocols to help address these dynamics.

“More and more, companies are being challenged to conduct internal housekeeping much more frequently than they otherwise would. Procurement has their own processes, but beyond procurement, a lot of companies are challenging themselves within their organizations to review suppliers, with the goal of consolidation. Be really sensible about the use of suppliers and how to spend the organization’s money.”

“Strategic meetings management is a continuous process, and companies in Europe really want to build these SMM programs. Most companies are still working event by event, but there’s a clear trend that organizations want to become more strategic in their management of meetings. And the first step is to find the data and establish a baseline. This is a big challenge for a lot of companies.”

While many of these indicators lend themselves to optimism regarding the growth of the meetings industry in Europe, planners are concerned that the spending levels will not reflect the expected increase in activity. Except for Spain, where overall meetings spend is expected to increase by 1.4% in 2019, anticipated spending is actually expected to decline somewhat or remain flat in all of the surveyed European countries. In Germany, where almost all other indicators of activity are positive, planners expect spending to decrease by 3.3%, raising the question of how activity increases will be funded.

Planners in Europe, like those in other regions, seem to be aware that their “new normal” means being constantly challenged to maintain a balance between managing event costs and delivering an optimal attendee experience across a healthy portfolio of meetings. This is perfectly illustrated when reviewing how planners in Europe approach cost-containment - the most popular choice is to reduce number of nights for the event (20%), but other planners favor reduction in offsite events and activities (17% each). That so many meeting professionals would recommend shortening a meeting over reducing offsite events and activities is confirmation that the overall attendee experience is taking high priority for planners in Europe.

Further illustration of this focus on the experience is the trade-off planners in Europe would make if offered an additional 10% for their 2019 budget. Unlike planners in North America, who would most frequently invest in improving the attendee experience, planners in Europe appear to be torn between increasing the number of meetings and improving the onsite experience (25% each). Respondents in Europe are also likely to

consider using those funds to increase attendance (20%), another indication that the reach of their meetings competes with experience for attention and funding.

One professional from the Nordic region of Europe sums up the paradox, “while some areas in Europe might be decreasing their budgets, overall, meeting budgets are increasing. It’s been strengthened by the strong economy. Planners are focusing on enhancing their current meetings, doing more within those events that increases the effectiveness of the meeting.”

Meeting Location

Meeting planners in Europe continue to prefer large cities for their meetings, with 78% prioritizing these types of destinations for their events. Twenty percent find second-tier cities optimal instead. According to one regional meeting professional, second-tier cities are likely more popular with planners working on smaller meetings. An industry professional in Germany notes, “We see increasing interest in Eastern Europe - Hungary, Poland, and some of the Baltic countries. Planners are prioritizing face-to-face time over travel, and these destinations are easy to get to from some parts of Europe and offer high-quality service and products and a great price.”

The list of top 10 destinations for meetings in this region remains largely unchanged from last year. Madrid, Spain, advances on Paris, France, edging that destination out for the 5th place spot. The Czech Republic city of Prague drops out of the 10th place spot, replaced by Lisbon, Portugal. As one meeting professional in Belgium observes, “our top destinations remain quite stable year-over-year. What we have seen is that some less-expensive locations are becoming interesting because of budget constraints, and new locations are interesting if they have great meeting venues because they are able to offer the same quality at a better price.”

1. **London, England**
2. **Barcelona, Spain**
3. **Berlin, Germany**
4. **Amsterdam, Netherlands**
5. **Madrid, Spain**
6. **Paris, France**
7. **Frankfurt, Germany**
8. **Rome, Italy**
9. **Munich, Germany**
10. **Lisbon, Portugal**

(Source: Cvent, 2018)

In addition to finding destinations that can accommodate the logistical requirements of their meetings, planners in Europe place a strong emphasis on safety and security when selecting a meeting location. Recently, safety considerations have expanded to include weather concerns – a topic mentioned frequently by planners in the region. As one respondent observed, “Change is really being driven by safety and security priorities. This could include natural disasters or even severe heat, which we’re seeing across Europe this summer. There are places we just can’t recommend to clients anymore – we know they’ll say no. Even with great security and a fantastic price, there is too much uncertainty.”



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Asia Pacific

The Asia Pacific region is an area of profound interest and opportunity for the meetings and events industry. The 2019 Global Meetings and Events Forecast includes perspectives from China and Hong Kong, Japan, and Australia to represent the region. Survey responses indicate that planners in China and Hong Kong are the most optimistic of the three, anticipating significant growth in 2019. Conversely, planners in Australia seem to be expecting a slight compression of activity in 2019, perhaps an adjustment following a year of solid growth in 2018. Across the region, meeting professionals indicate there is an increasing focus on maximizing budgets and showing ROI for meetings.

Meetings Activity

Consistent with many other regions, survey respondents in Asia Pacific report the most prevalent type of meeting is the category that includes internal team and training meetings. This is particularly true in Australia, where these meetings account for 28% of all activity, compared to 21% in China, Hong Kong, and Japan. Similar to other areas, internal meetings are expected to have only small increases in some countries (China/Hong Kong, 0.6%) and in fact, decrease in others (Japan -1.0% and Australia -1.7%). While firms commit enormous resources to internal meetings, these types of meetings may have more difficulty securing funding when vying with customer facing or sales-related meetings, which might be viewed as more directly tied to growth and ROI.

As one regional meetings professional offered, “In 2019, we are seeing continued budget consciousness. Event owners are very concerned about what they get out of their meeting spend in terms of return on investment. We are seeing that impact how meetings and events are managed from beginning to end.”

At a regional level, survey respondents are expecting growth across several meeting categories. When examining the outlook more specifically, overall growth is driven by high expectations for China and Hong Kong, where the largest growth is anticipated. Respondents expect Japan to demonstrate moderate growth, while respondents in Australia are anticipating a slight contraction in meetings activity after leading the region in expected growth in 2018.

ASIA PACIFIC:

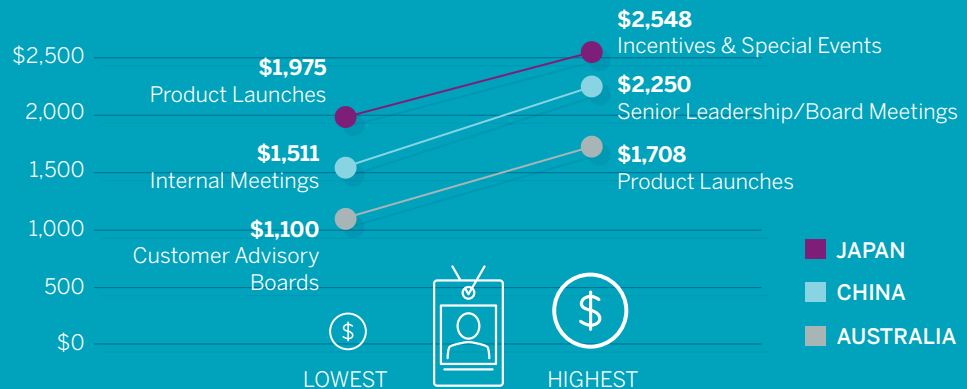
Focus on ROI

Planners are under pressure to deliver more for less in a dynamic, well-traveled region.

Source: American Express Meetings & Events Asia Pacific Survey, 2018

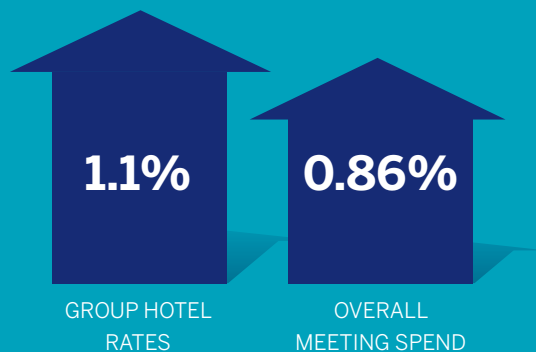
PER-ATTENDEE SPEND - HIGHLY VARIED PRIORITIES

Planners in Japan spend on incentives, while those in China save their **highest spend** for senior leaders. In Australia, per-attendee spend is highest for product launches.



MAXIMIZING EVERY DOLLAR SPENT

Costs are **rising** faster than budgets in an ROI-focused market.



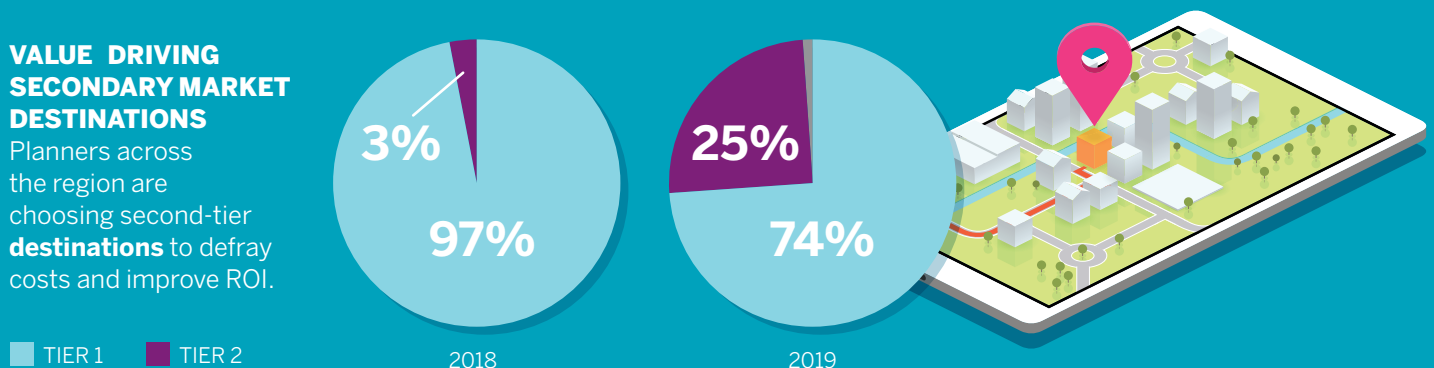
THEY SAID IT:

"Typically we are seeing increased engagement from procurement teams and a stronger focus on the consolidation of a strategic meeting program. Company financial investment in M&E however has remained stagnant or even decreased whilst the expectations of program ROI has increased."

– Meeting Professional from Asia Pacific

VALUE DRIVING SECONDARY MARKET DESTINATIONS

Planners across the region are choosing second-tier destinations to defray costs and improve ROI.



Regionally, the most growth in activity is anticipated in incentives and special events, driven largely by an expected increase of activity in China and Hong Kong. Meeting planners in China are also expecting growth in product launches and conferences and tradeshow, with activity increasing 2.0% and 1.9% respectively. Meeting professionals in Japan expect conferences and tradeshow to grow as well, with an anticipated 1.4% increase in 2019. Survey respondents in Australia report small decreases in activity across all meeting types.

The outlook for meeting attendance follows a similar pattern. Regionally, attendance is expected to grow slightly across all meeting types with the exception of internal team and training meetings, which should see little change in attendance for 2019. Attendance growth expectations are most notable among survey respondents in China and Hong Kong, who expect increases ranging from 1.6% for senior leadership and board meetings to 3.4% for product launches and 3.6% for incentives and special events. Japan's attendance outlook is more moderate, but still noteworthy with expected growth of 1.25% in attendance for senior leadership meetings and 0.6% to 0.7% for customer advisory meetings and incentives. Meeting planners in Australia anticipate a small decrease in attendance for internal meetings and product launches, with no real change in other categories.

A slight decrease in event length is anticipated by meeting planners in Australia, as well. Product launches are expected to be 1.75% shorter, and customer advisory boards and internal meetings may see small reductions in length. Survey respondents in Australia expect other meeting types to remain relatively unchanged in length. Meanwhile, meeting planners in China anticipate longer meetings, with increases that range from 1.32% longer for product launches to 2.36% longer for customer advisory boards. As with overall activity and attendance, Japan falls in the mid-line, with more moderate growth expectations for product launches, conferences, tradeshow, and customer advisory boards all expected to increase in length during 2019.

One planner in Singapore explained how some meetings are being made shorter to help manage budgets. "I would say for Singapore, our clients are increasingly budget conscious, and as a result, are working to make their programs more efficient. The duration of programs is actually decreasing. Where we used to see conferences running for three to four days, clients are now becoming more efficient and condensing that into maybe two days, and achieving some savings there."

Meetings Budget and Planning

With a design change in the 2019 survey, cost per attendee is being recalibrated to better reflect industry realities. As expected, we do see higher estimates of cost per attendee across all countries compared to 2018 – most of this change is likely attributable to the survey question itself.

The country-level patterns change somewhat when analyzing cost per attendee (all in US dollars). Japan leads the region with the highest per-attendee spend across meeting types. According to meeting professionals in Japan, product launch meetings have the lowest cost per attendee (\$1,975), while most meetings have much higher spends. Internal meetings average \$2,350 per attendee, while conference and tradeshow and incentives cost \$2,500 per attendee. Costs are expected to increase in 2019, particularly for product launches, conferences and tradeshow and incentives.

Survey respondents in China and Hong Kong fall in the midline for per-attendee costs, with internal meetings averaging \$1,511 per attendee, incentives slightly higher at \$1,821, with the highest spend occurring for senior leadership and board meetings, with an average per-attendee cost of \$2,250. Planners in this area anticipate costs to increase in 2019, with the lowest increase expected for internal meetings (1.1%). All other meeting categories are projected to increase by 2% or more, with incentives increasing the most (2.7%).

Of the three countries surveyed, respondents in Australia report the lowest per-attendee budgets, ranging from around \$1,100 per person for customer advisory boards and internal team/training meetings to incentives and special events spend of \$1,587 per person and product launch spending of \$1,708 per person. While planners in Australia expect some per-attendee costs to go down (internal meetings decreasing by 0.8%), costs are expected to rise somewhat for conferences and tradeshow, product

“I think in other regions there is a lot of conversation about ROI from an attendee perspective. In Asia Pacific, it is very much a financial calculation.”

launches, and incentives. However, meeting planners in the area are under pressure across the board to manage the cost of meetings and show value.

As one meeting planner described the pressure to deliver ROI: “Within Asia Pacific, there is a lot of focus on savings. Increasingly, companies need a way to report savings on a quarterly basis. As a result, there is a lot of pressure for meetings to reduce costs and deliver great ROI.”

A respondent in Australia agrees. “I think in other regions there is a lot of conversation about ROI from an attendee perspective. In Asia Pacific, it is very much a financial calculation. Clients see their ROI in terms of what new sales they achieved based on a meeting. That’s what they consider the measurement of success.”

Contributing to the challenge in managing costs is the outlook for space availability and rates in 2019. While projecting an increase in activity and attendance, planners in the region expect availability to remain flat in 2019. Group hotel rates are expected to increase by 2.65% in China and Hong Kong, with a more modest increase of 0.50% in Australia, and 0.43% in Japan. The outlook for 2020 is somewhat more optimistic, with planners in the region expecting 1.1% more space available. For now, meeting planners in the region are looking to alternative destinations to find available and suitable space at rates in line with budgets.

According to a meeting professional in Australia, space availability challenges there are tied to a shift to larger meetings, making way for other destinations throughout Asia. “We have noticed this year that groups are getting a little larger, and they are pushing into Singapore, Vietnam, and other parts of Asia Pacific. Our big destinations like Sydney and Melbourne are having challenges with capacity, so we are finding that programs are looking at other regional destinations as an alternative.”

While costs are generally rising in the Asia Pacific region, spending may not keep pace in 2019. Survey respondents expect overall meetings spend to increase for the region

by 0.86%, but the expectations vary considerably country by country. Only planners in China and Hong Kong expect spending on meetings to increase; in those countries, it is expected to rise a respectable 4.3% over the next year. Conversely, respondents in Australia expect very slight negative spending changes, 0.3% down in 2019, while those in Japan expect more of a decrease (0.7% down).

With activity and costs on the rise for parts of the region, meeting planners will be deploying all their expertise and experience to maximize every dollar they spend. When asked what areas they would prioritize for cuts, if necessary, planners in Asia Pacific are more varied in their approaches than their counterparts in other regions. Twenty percent indicate they would reduce offsite evening events – no other option achieved even 15% of respondents' selection.

When the scenario is flipped and there is a budget surplus of 10%, planners in Asia Pacific gravitate toward three popular options to invest that windfall: improving the onsite experience (26%), increasing the number of days for meetings (23%), or increasing the number of attendees (21%). The relative prevalence of planners opting for increasing meeting length or attendance is suggestive that current funding levels are not quite sufficient to achieve the full objectives for the meeting.

Meeting Location

When selecting locations for meetings, planners in the Asia Pacific region operate very similarly to those in North America and Europe. Three-quarters select large cities as their preferred destinations, while a quarter opt for second-tier cities for their meetings.

One regional meetings professional notes, “We see there is a lot of interest in some of the regional destinations which are more low-cost. For instance, we’ve seen a lot of interest in Cambodia, Vietnam, and other Southeast Asian destinations.”

Another meeting professional adds, “In Hong Kong, tighter budgets are driving interest in second- and third-tier cities. As long as it’s still accessible and can accommodate the meeting requirements, there is a lot of interest. It also helps that people are interested in going places they haven’t been before.”

The list of the top destinations in the Asia Pacific region has some changes from 2017. Seoul, South Korea, dropped out of the top 10, and New Delhi, India, makes an appearance in the number 8 slot – ahead of Tokyo, Japan.

1. Singapore
2. Sydney, Australia
3. Bangkok, Thailand
4. Kuala Lumpur, Malaysia
5. Hong Kong
6. Shanghai, China
7. Melbourne, Australia
8. New Delhi, India
9. Tokyo, Japan
10. Mumbai, India

(Source: Cvent, 2018)

Central & South America

Meeting professionals in Central and South America have a largely positive outlook for their region in 2019. Survey respondents from Mexico and Brazil are optimistic, and offer insights into what they are expecting for 2019. Planners see signs of growth across the region, and some are leveraging virtual technology to accommodate this increase in demand.

Meetings Activity

Meeting planners in Central and South America indicate that internal team and training meetings account for a generous proportion of their total meetings activity. According to respondents in Mexico, 31% of all meetings are internal, while planners in Brazil indicate internal meetings are 22% of the total (senior leadership meetings and incentives are equally common at 21% and 19% respectively).

Planners in Brazil have a positive outlook for 2019, with anticipation of 3.95% increase in conferences and tradeshow, 3.63% increase in incentives, and 3.24% increase in customer advisory board meetings. Senior leadership meetings are also expected to increase at a rate of 2.19% in 2019. Similar to other regions, internal team and training meetings are expected to remain flat next year.

In Mexico, planners are looking for meeting activity to remain relatively flat across all categories in 2019. A meeting professional in the region notes that the changing political leadership is leading to a wait-and-see approach. “We have a new president and a lot of change in 2019. Many businesses are considering what this means for their future. I don’t think there is going to be a lot of immediate change in activity while companies are watching what the new president does.”

In terms of meeting attendance, respondents in Brazil are optimistic, projecting between 2% and 3.5% increase in attendance for all meeting categories except internal team and training. The highest expected growth in attendance is for conferences and tradeshow, with a 3.55% increase in attendance in 2019. Customer advisory boards and incentives are expected to increase attendance by 3.25%.

Meeting professionals in Mexico are anticipating modest attendance increases in all categories except conferences and tradeshow, which are expected to have no change

CENTRAL & SOUTH AMERICA:

Rising Demand

Planners see signs of a growing region and are leveraging technology to help them keep up with the demand.

Source: American Express Meetings & Events Central and South America Survey, 2018



CONFERENCE BOOM IN BRAZIL

Conferences and tradeshows are a growing segment for **Brazil**.



3.55%

ATTENDEES



3.95%

NUMBER OF EVENTS



3.23%

NUMBER OF DAYS



\$1,966

PER ATTENDEE

A REGION RISING IN POPULARITY

Regional experts are seeing local and international activity **rise** at their destinations.



TOP CITIES

1. Rio de Janeiro, Brazil
2. Cancun/Riviera Maya, Mexico
3. Mexico City, Mexico
4. São Paulo, Brazil
5. Cartagena, Colombia
6. Panama City, Panama
7. Punta Cana, Dominican Republic
8. Buenos Aires, Argentina
9. Lima, Peru
10. Santo Domingo, Dominican Republic

Q: What characteristic makes the region special?

A: The People

(79% US, 63% Canada, 66% LAC respondents agree)

(Source: American Express Meetings & Events Latin America Destination Report, 2018)

THEY SAID IT:

"Virtual meetings definitely help people to gather and share information without requiring the spend associated with traveling to a destination meeting. Face-to-face will remain a very important thing for us culturally, but the technology is a great option for budget-conscious companies."

– Meeting Professional from Mexico



VIRTUAL MEETINGS AS A SUPPLEMENT

Planners are using virtual meeting **technology** to offset budgetary limitations on attendance.

76%

USING VIRTUAL MEETING
TECH IN AT LEAST SOME
MEETINGS

30%

WOULD USE EXTRA
FUNDS TO INCREASE
ATTENDANCE

in attendance. The largest attendance increases are estimated at 1.00% in product launches and incentives.

Planners in Mexico also expect product launch meetings to become somewhat longer (1.31% increase). Most other meeting types are expected to change less than 1% in length, and customer advisory boards are expected to shorten slightly – by 0.88%. In Brazil, however, the optimism continues as planners look for meetings of all types to become a bit longer in 2019. As with attendance, the highest projections are for conferences and tradeshow, expected to increase by 3.23%, and incentives, which are expected to increase by 2.83%.

Meetings Budget and Planning

With an updated survey question to measure estimated cost per attendee by meeting type, considerable increases are noted across all regions compared to 2018 – this is largely a function of the question design. For nearly all types of meetings, planners in Brazil are faced with higher costs per attendee than their counterparts in Mexico. The exception is for incentives, where estimated per-attendee costs are nearly equal at \$2,040 in Brazil and \$2,111 in Mexico.

Planners in Brazil report higher per-attendee costs for other types of meetings. Respondents in Brazil indicate every meeting category has a per-attendee cost exceeding \$1,500, and product launches and senior leadership meetings, like

One budget management strategy used by planners in Central and South America is the increasing incorporation of virtual meeting technology into their events, allowing people to attend relevant sessions without requiring the time and expense of travel.

incentives, exceed \$2,000 per attendee. In Mexico, most meetings have a per-attendee cost under \$1,500. Aside from incentives, only product launches have relatively higher costs (\$1,767 per attendee).

A meeting professional in the region notes that amid concerns about security in Mexico, companies can find budget-friendly options at locations that offer significant security. “I know there is a perception that Mexico is a risky destination, but it's not actually different from other countries. There are some areas that are riskier, but there are many destinations that are very secure and very safe for companies to bring their events that will be good from a budget standpoint.”

Not only are costs higher for planners in Brazil, they are also expected to increase faster there. Planners anticipate that most meeting types will see costs rise by around 2%. The only exception is senior leadership meetings, for which costs are expected to increase only moderately at 0.88%. In contrast, planners in Mexico believe costs will be increasing by around 1.5% for internal meetings, product launches, and incentives, while other meeting types will have lower or no cost increases in 2019.

As with other early indicators in Central and South America, group hotel rates are also expected to rise in 2019. Group rates in Mexico are actually expected to increase faster than those in Brazil (1.52% and 0.86% respectively), with a regional average increase of 0.96%.

With nearly all meeting metrics expected to increase in 2019, planners in the region are anticipating that actual spend on meetings is not expected to increase at a similar pace. In fact, planners in Mexico anticipate a moderate decrease in overall spending on meetings (-1.21%). And while planners in Brazil are more optimistic, the projected 1.38% increase will not accommodate all of the expected increases in activity, attendance, and costs for their meetings.

One budget management strategy used by planners in Central and South America is the increasing incorporation of virtual meeting technology into their events, allowing people to attend relevant sessions without requiring the time and expense of travel. Three-quarters of planners in the region indicate that virtual technology is present in at least 10% of their meetings, compared to 43% of planners in North America and 49% in Europe. “Virtual meetings are something that definitely helps people to gather and share information without requiring the spend associated with traveling to a destination meeting. Face-to-face will remain a very important thing for us culturally, but the technology is a great option for budget-conscious companies.”

When asked to identify areas to cut if faced with budget shortfalls, planners in Central and South America have varied opinions about how to reduce costs – no single option achieves even 20% of the total respondents. However, the two options with the most “critical mass” are similar to those seen in other regions. Eliminating offsite evening events and offsite optional activities (17% each) are viewed as opportunities to reduce costs without reducing meeting content or attendance.

When asked the corresponding question of where they would spend if their meetings budgets unexpectedly increased by 10%, planners in this region are consistent with their colleagues in North America and Europe – improving the attendee experience is paramount (33%). The other very popular option is to increase the number of attendees, selected by 30% of respondents. Improving and expanding engagement shows the strategic priority of these planners, even as they anticipate managing more activity in 2019.

Meeting Location

Similar to planners in other regions, 80% of respondents in Central and South America prefer large cities for their meetings, with 20% considering second-tier cities optimal instead. A meeting professional in the region notes that meetings that previously operated internationally to North American destinations have recently begun opting for destinations more local within Central and South America. “Increasingly, companies are looking into holding their meetings in Latin American countries, which is good for our region. Organizations that have previously been holding meetings in North America

are operating their meetings in Mexico, Argentina, Colombia, Peru, Brazil, and Costa Rica. It's a great opportunity for the region."

The list of top 10 destinations for meetings in this region remains largely unchanged from last year. Santo Domingo in the Dominican Republic claims a spot on the list, replacing Santiago, Chile, and San José, Costa Rica, which tied for 10th place in 2017.

- 1. Rio de Janeiro, Brazil**
- 2. Cancun/Riviera Maya, Mexico**
- 3. Mexico City, Mexico**
- 4. São Paulo, Brazil**
- 5. Cartagena, Colombia**
- 6. Panama City, Panama**
- 7. Punta Cana, Dominican Republic**
- 8. Buenos Aires, Argentina**
- 9. Lima, Peru**
- 10. Santo Domingo, Dominican Republic**

(Source: American Express Meetings & Events Destination Analysis, 2018)

Special Sections





Latin America Destination Report: **Perceptions of Top 5 Cities**

In partnership with IBTM Americas

Latin America Destination Report: Perceptions of Top 5 Cities

Approximately 1.3 billion people traveled internationally in 2017, marking the strongest growth in seven years (+7%).¹ This increase in travel worldwide has not only created a more sophisticated leisure traveler, but has also raised the bar for meeting planners to provide more local, authentic experiences for attendees. From bucket-list destinations like New Zealand to traditional favorites like Orlando and London, destination choice has a critical impact on the attendee experience. The challenge for meeting planners is to find a destination that offers the infrastructure and amenities needed for a meeting, but also excites and energizes well-traveled attendees.

Increasingly, Latin America is garnering attention as a compelling destination for meetings and events – even beyond the well-known resort towns. Anyone who has visited the sparkling blue waters of Cancun, explored the Costa Rican rainforests on zipline, or celebrated the annual Day of the Dead in Mexico understands the colorful heritage, natural beauty and warm hospitality of the region. With an increase in travel to Latin American countries expected in 2018 (between 2% and 6% growth),² many countries are embracing tourism as they rebound from years of declining economies. As individuals expand their familiarity and enthusiasm to travel to Latin America, and more multinational businesses expand into countries in Central and South America,

meeting planners are now increasingly looking at the region as a destination for meetings and events. Meeting planners are risk averse, and political unrest, concerns about safety, and border issues with the United States may have an impact on perceptions of the region. Conversely, the region boasts ease of air lift from the US and Canada, favorable exchange rates, and has so far been immune from major terrorist incidents experienced in other parts of the world. With so many factors potentially weighing on the minds of meeting planners, we conducted a survey of 232 US, Canadian*, and Latin American meeting professionals to understand how they currently perceive the region and its top destination cities.

TOP 5 Meeting Destinations



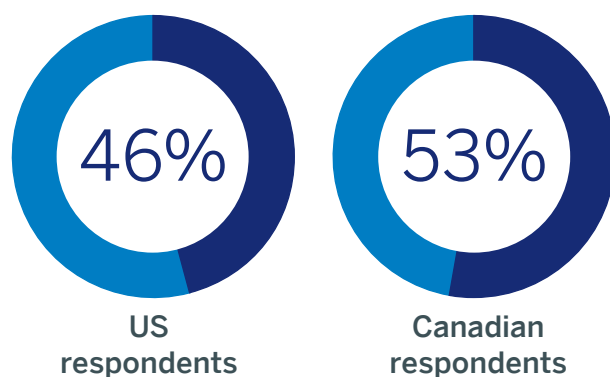
*To qualify, North American meeting planners had to operate international as well as domestic meetings and events.

The People and Culture Are Making a Big Impression

The overarching good news is that interest in holding meetings in the region is high – and increasing.

A survey conducted by American Express Meetings & Events and IBTM Americas found that there is growing awareness of Latin America among meeting planners. Additionally, 46% of US and 53% of Canadian respondents report that attendees are increasingly interested in the region as a destination.

Increasingly interested in Latin America as a destination



What is driving this increased interest over alternative destinations? While beaches and food are highly ranked characteristics that set the region apart, a whopping 79% of US respondents indicate that people are what makes Latin America special. Over 60% of Canadian and Latin American respondents feel the same. Latin America is also known for its unique blend of Indigenous, African, and Spanish traditions, so it is not surprising that culture is another characteristic planners find compelling. Constantly challenged to provide unique and authentic experiences, meeting planners view Latin America as a region that can deliver. According to the SKIFT report, Megatrends Defining Travel in 2018,³ interest in destinations in Latin America and the Caribbean (LAC) will shift from well-known cultural experiences – like Machu Picchu and Day of the Dead, to more off-the-beaten path experiences in second-tier cities.

Direct Knowledge and Experience Make a Difference

The meeting planners included in this survey are experienced with planning international meetings, and there is a high degree of familiarity with the top destinations of Rio de Janeiro, Cancun, and Mexico City. Almost half of both US and Canadian planners surveyed have operated meetings in these cities in the past two years. Previous experience operating a meeting in a destination almost doubles the likelihood that a future meeting will be operated there. For example, only 33% of planners who had never operated a meeting in Rio de Janeiro would consider that city for future meetings, compared to 64% of planners who have operated meetings there previously. That correlation is even more pronounced in the less familiar destination of Cartagena, with planners who have held previous meetings there over 3 times more likely to consider Cartagena for future meetings than their counterparts.

While previous meeting experience in a destination is immensely helpful to future consideration, there are other opportunities for meeting planners to learn and experience an unfamiliar destination. Our research showed that among planners who have not operated meetings, but have personally traveled to a destination, the likelihood of future meetings sharply increases as well. Fostering professional connections and relationships with local businesses is another priority for meeting planners looking to expand their destination horizons. Building local relationships has a positive effect on planners' consideration of a destination for future meetings. In the top three destinations of Rio de Janeiro, Cancun, and Mexico City,

more planners report having local contacts in those destinations.

Familiarization trips are a standard industry practice and these results confirm the importance of this tool for destination marketers – planner familiarity and local contacts do have an impact on destination selection. These trips are a great learning tool for planners to see for themselves how a city can holistically cater to meetings, from hotels and ease of access to local cultural experiences and amenities. Attendance at industry shows is another way planners can make connections with local contacts, such as Convention and Visitor Bureaus (CVBs) and hoteliers. Fostering a next level understanding helps planners overcome uncertainty – a win-win for planners and for cities trying to capture more meeting spend.



Destination Perceptions of the Top 5 Cities

While the overall image of the region has an impact on perceptions, when it comes to choosing a destination, specific city-level characteristics highly factor into planner decisions. The following section provides snapshots of each of the top 5 cities in Latin America as reported in the American Express Meetings & Events 2019 Global Forecast. Based on survey responses, we have identified perceptions to capitalize on (✓) and concerns

to address (⚠). When evaluating each of these destinations for meetings and events, meeting professionals should not only consider their own planning needs, but also the perceptions of their attendees. Communication becomes even more important when attendees are traveling to an unfamiliar place to not only build excitement, but overcome any potential areas of concern.

Rio de Janeiro, Brazil

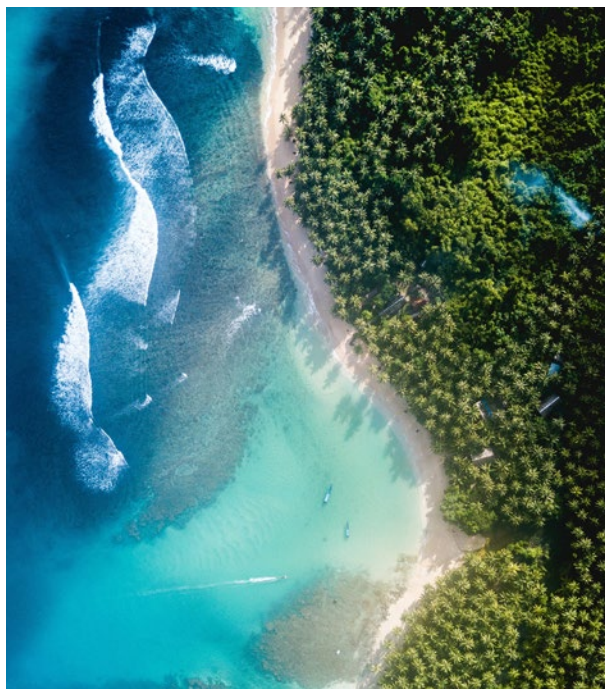
Host of the 2014 World Cup and 2016 Summer Olympics, Rio de Janeiro boasts new infrastructure, airport upgrades, and over 4,000 new hotel rooms ready to accommodate any group.* With the beaches of Ipanema and Copacabana and the iconic Christ statue, it's no wonder this breathtaking city tops the list of Latin America meeting destinations. Overall, US and LAC planners surveyed had a very positive impression of Rio, although safety concerns may factor into US planner decisions. In contrast, Canadian respondents perceived several areas of concern.



RIO DE JANEIRO, BRAZIL	US	CANADA	LAC
Has good air transportation options for attendees	✓		✓
Is a safe location	⚠	⚠	
Has modern amenities and conveniences	✓		✓
Has the necessary infrastructure to support meetings and events		⚠	✓
Has suppliers I know and trust	✓	⚠	
Is a destination attendees would be enthusiastic about	✓	⚠	✓
Is politically stable		⚠	⚠
Is an affordable destination			

Cancun/Riviera Maya, Mexico

The Caribbean beaches of Cancun and the surrounding area have long been a beloved vacation destination and, more recently, a top choice for incentive trips. Hotels have responded by purposefully designing meeting spaces for groups. These accommodating venues paired with the fresh seafood, fine dining, and the opportunity to explore Mayan history make Cancun a desirable destination.



Survey respondents perceived Cancun very favorably across the board, however, their concerns about safety are likely top of mind due to recent travel warnings advising of turf battles between criminal groups in areas frequented by US citizens.⁴ This highly publicized increase in violence along with the uncertainty of a new Mexican president may be contributing to concerns from the US and Canada about political stability.

CANCUN/RIVIERA MAYA, MEXICO	US	CANADA	LAC
Has good air transportation options for attendees		✓	✓
Is a safe location		⚠	✓
Has modern amenities and conveniences	✓	⚠	✓
Has the necessary infrastructure to support meetings and events	✓	✓	✓
Has suppliers I know and trust		✓	✓
Is a destination attendees would be enthusiastic about			✓
Is politically stable	⚠	⚠	
Is an affordable destination		✓	

Mexico City, Mexico

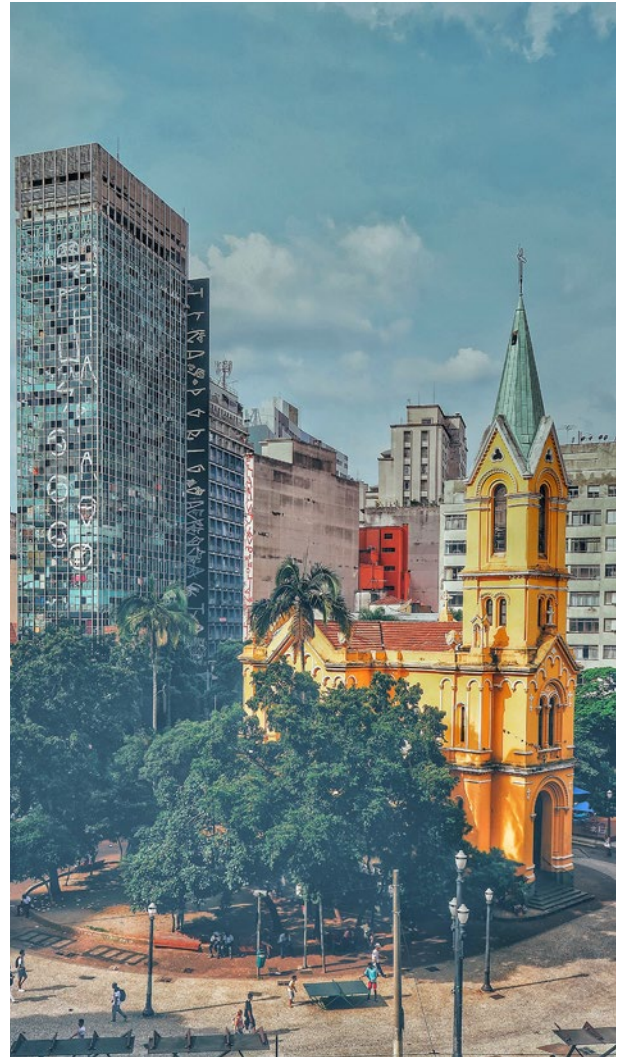
Mexico City is the largest city in Latin America and offers groups the opportunity to experience modern amenities combined with the rich traditions and heritage of Mexico. Not only does it have the most museums of any city in the world, Mexico City ranks fourth on the list for number of theaters after New York, London, and Toronto. It is also home to four World Heritage Sites.* Safety is a concern among planners we surveyed. Unlike the US and LAC planners, Canadian planners are concerned about amenities, political stability, and trustworthy suppliers.



MEXICO CITY, MEXICO	US	CANADA	LAC
Has good air transportation options for attendees	✓		✓
Is a safe location	⌊	⌊	⌊
Has modern amenities and conveniences	✓	⌊	✓
Has the necessary infrastructure to support meetings and events			✓
Has suppliers I know and trust		⌊	✓
Is a destination attendees would be enthusiastic about	✓		✓
Is politically stable		⌊	
Is an affordable destination	✓		✓

São Paulo, Brazil

São Paulo is one of the largest cities in Latin America. The São Paulo Convention Center, also known as Anhembi Parque, is Latin America's largest convention complex. It has 400,000 square feet of space, including the Celso Furtado Auditorium for 2,500 persons.* A city this size certainly has many renowned hotel, venue, and dining options, however, São Paulo may be overshadowed by the flair and modern updates that planners find in Rio de Janeiro. This lack of a “newness” may be contributing to the concerns planners have about the destination.



SÃO PAULO, BRAZIL	US	CANADA	LAC
Has good air transportation options for attendees		✓	
Is a safe location		✓	✓
Has modern amenities and conveniences		✓	✓
Has the necessary infrastructure to support meetings and events		✓	✓
Has suppliers I know and trust	✓		✓
Is a destination attendees would be enthusiastic about	✓	✓	✓
Is politically stable			
Is an affordable destination		✓	✓

Cartagena, Colombia

Founded in 1533 as the first Spanish colony in the Americas, Cartagena is a UNESCO World Heritage site. Within the walls of the city, Colonial era forts and buildings provide unique venues for meeting planners. As noted by respondents, Cartagena has great air lift for US and Canada. Rafael Nunez International Airport (CTG) has direct flights to Fort Lauderdale, Miami, and New York City, and seasonally to Montreal and Toronto.* Familiarity with Cartagena was the lowest across respondents, but planners have an overall positive impression that will likely only improve with increased experience with the destination.



CARTAGENA, COLOMBIA	US	CANADA	LAC
Has good air transportation options for attendees	✓	✓	
Is a safe location		⚠	
Has modern amenities and conveniences		✓	
Has the necessary infrastructure to support meetings and events	✓		✓
Has suppliers I know and trust		✓	
Is a destination attendees would be enthusiastic about			
Is politically stable		✓	
Is an affordable destination		✓	

Conclusion

Paulo Coelho, a well-known Brazilian novelist wrote, *“Be brave. Take risks. Nothing can substitute experience.”* This advice rings true for meeting planners considering a new destination. It is important to be aware of perceptions (your own and those of your attendees), but sometimes the only way to find hidden gems is to get out of your comfort zone and explore somewhere new. Trying a new city first-hand, either during a site visit or familiarization trip, can help to overcome uncertainties and open new possibilities. Increasing pressure on planners to provide unique, yet budget-friendly experiences, makes the culture, hospitality and natural beauty of Latin America an appealing destination.



1. World Tourism Organization - <http://media.unwto.org/press-release/2018-01-15/2017-international-tourism-results-highest-seven-years>
 2. World Tourism Organization - <http://media.unwto.org/press-release/2018-06-25/international-tourism-exceeds-expectations-first-months-2018>
 3. Skift Megatrends 2018 – <https://skift.com/wp-content/themes/skift/img/megatrends-2018//Skift-Megatrends-2018.pdf>
 4. US Department of State - <https://travel.state.gov/content/travel/en/international-travel/International-Travel-Country-Information-Pages/Mexico.html>
- * Cvent Meeting and Event Planning City Guides.

The Future of Personalisation



By Banks Sadler

We are now living in a world where delegates have increased expectations due to the continual advancements in technology. Every attendee has different personal and emotional requirements and we're seeing a greater need to offer a more individual and personalised experience at events.

Content and experiences have evolved from simple online websites and portals to content-driven mobile apps, Augmented Reality (AR)/Virtual Reality (VR) experiences, and Internet of Things (IoT) solutions. Companies such as Amazon, Netflix, and Spotify are leading the way with curated content, with Netflix giving viewers access to an incredible 100 million products tailored to their individual preferences at any given time.¹ Users are now continually surrounded by these personalisation algorithms from their Instagram feeds delivering their favourite content first, to preferred shopping sites providing bespoke buying recommendations. This constant, highly personalised content not only boosts engagement and brand loyalty, but also increases expectations around how they are engaged in other situations; and this is particularly applicable within the events arena.

Throughout the events cycle there are multiple opportunities to drive a more tailored guest experience, from the invitation process and event app content to post-event survey data. Email communications, registration systems, and agendas are a standard starting point for basic personalisation, but there are many more ways that planners can be delivering more tailored experiences. Whilst any progressions in the events industry are noncomparable with the rapid advancements taking place in other sectors, like e-commerce, there is a slow and steady investment in data solutions and technologies to support more personalised events.

Personalisation through data

Event organisers have access to a wealth of data throughout the event cycle. Whilst it is important to be mindful of privacy regulations, there is excellent opportunity to leverage this intelligence to deliver a more curated delegate experience. This data allows us to focus on the attendees' needs and wants, opening up opportunities to engage with our audiences more than ever before. One of the most powerful data-driven solutions is automation, which provides event organisers the Holy Grail – the ability to personalise at scale based on users' actual behaviour. This behavioural data means that messaging can be more targeted, relevant, and timely, driving a better attendee experience. When collected in real-time, data can give the organiser

intelligence about everything from delegates' locations through to their heart rate; if leveraged properly, this provides organisers multiple ways to personalise the experience, from dynamic signage and curated agendas to session suggestions based on their stress levels.

Next generation hotels are also capitalising on the data available to them to drive a more tailored guest experience. Providing high-touch and seamless service has always been fundamental to the hotel guest experience, but data is now equipping hotels with the tools they need to drive more personalised stays from loyalty programmes to in-room activations. IoT-enabled rooms are adding layers of personalisation, such as your desired room temperature and favourite channels on arrival, to your favourite coffee ready for you in the lobby. Smart hotels combined with data-driven event planning opens up huge opportunities for the industry to capitalise on a highly personalised experience from start to finish.

Hyper-personalisation or a privacy nightmare

But when does personalisation stop adding value to the attendee and become intrusive? There is a fine line between adding elements of personalisation that engage versus verging on invasive. With many well-publicised data breaches in 2018 and General Data Protection Regulation (GDPR) coming into enforcement, consumers have become even more aware of who holds their data and how it is being used. This heightened awareness means that beyond ensuring events comply with data regulations, event organisers also need to be aware of attendee expectations of privacy. Too much personalisation doesn't necessarily add value to the event experience.

An area that is seeing more investment, but also opening up more questions around management of data privacy, is facial recognition technology. Whilst the application is yet to still fully take off within the meetings industry, it is being trialled for more efficient and personalised check-in processes (the 2020 Tokyo Olympics will use facial recognition to streamline entry), improved onsite security, and measurement of the attendee experience. There

are more simple uses of this technology, such as how is the content resonating with the audience. Are they happy, frustrated, bored, or excited? Or the more complex use where the system recognises the facial emotion and through automation, subsequently delivers the attendee relevant content or suggestions that fits with that emotion. This creates a whole new level of real-time event data gathering and personalisation opportunities. When an organiser can detect patterns of emotional behaviour through facial recognition software and then combine this with data such as age and gender, this gives the organiser powerful measurements for ROI, all pinpointed to specific moments within the event. But how comfortable are attendees allowing organisers to have access to their emotions? And does this expose brands to new risks when they take advantage of this information? Issues like these make it critical that event organisers communicate what data they are capturing and why, ensuring the control is always with the attendee.

Technology for bespoke experiences

There is a wealth of technology available for event organisers to satisfy attendee demands and give them individualised experiences. Major hotel chains such as Hilton and Starwood have been employing artificial intelligence (AI) chatbots for some time now. The data they collect provides insight into commonality within guest requests and new trends, allowing the hotel to make regular tweaks to their guest experience. These concierge-style services aren't just limited to hotels. There have also been instances of virtual assistants accompanying delegates at conferences to maximise their experience. In the events arena, virtual assistants are still very much in their infancy, and are still lacking the sophistication to be a trustworthy and credible support to an event, but there is huge potential for them if the data were to become richer and fully leveraged by organisers. If all the touchpoints are analysed along the delegate journey, AI technology could play an integral part in driving a more curated experience.

Event apps can significantly support event personalisation by helping attendees feel like the event has been curated just for them. Bespoke agendas are a simple integration, ensuring that



delegates aren't bombarded with irrelevant content and can make the best use of their time at an event. When combined with gamification, networking elements and push notifications, apps support attendees in creating their own experiences, using their time effectively, and increasing engagement.

Augmented Reality (AR) will continue to become more prominent within the industry to drive personalised experiences as we continue to see a war of the tech giants on driving smartphone technology and the wearables market. Attendees may not have to seek out information, as it will be laid over their current environment, engaging them in situations they might not have initially sought out. We may see organisers tapping into more gamification opportunities, where they encourage attendees to interact with content and move around an event. Presenters can fully immerse their audiences in their content, whether they're presenting on the vision of their business or showcasing a new product launch, with delegates being able to create the experience that best suits them.

With the increased use of these technologies and changing approach to event design, it is now possible to drive greater engagement and in turn, a positive change in behaviour of the delegates post event. Applying these new skills and knowledge to the workplace can then create significant impact to the performance of the business, presenting a more positive return on investment for any live event activity.

Personalisation 2020

So, what could the future hold for event personalisation? Automation likely will become more sophisticated with increasingly advanced systems to support delivering communications and content tailored to the attendee and their behaviour. As AR technology integrated into smartphones becomes more accessible and mainstream, we will likely see a rise in AR usage sitting across the entirety of an event rather than fixed to certain activations. Facial Recognition technology may give planners the opportunity to personalise the event experience more than ever. It will be increasingly used for event registration, but we may start to see it used more so for monitoring of audience emotions. Identifying an attendee's journey through facial recognition can be done without knowing who they are, and is a powerful way to be able to give them a more seamless and personalised event experience.

Whilst evidence suggests that the event industry is slowly catching up with consumer trends to meet the changing appetites of attendees, we are really only at the beginning of this exciting journey. Concerns over budget, data privacy, and using 'technology for technology's sake' will always be barriers to adoption, but through an increase in audience expectations and proven results, we can really begin to explore meaningful engagement and ROI. For event planners, the job now is to continually challenge this agenda and begin designing more personalised experiences that can meet real business objectives.

1. <https://www.thedrum.com/opinion/2018/02/12/personalisation-the-clock-ticking-brands>



Meetings Legal Trends

By Joshua L. Grimes, Esq., Grimes Law Offices, LLC

World events in 2018 mean change for the meetings industry. Legal developments around the globe are creating new “best practices” that cause companies both big and small to re-evaluate the ways in which meeting services are delivered. In this paper, we will explore the implications of three legal “hot buttons” – GDPR, emergency planning, and codes of conduct.

GDPR Implementation

Perhaps the most publicized development was implementation of the European Union General Data Protection Regulation, or “GDPR.” GDPR builds upon prior EU privacy directives and codifies various privacy best practices including the understanding that persons in the European Union countries have a right to protection of their personal information, called “Personal Data”.

GDPR’s privacy protection laws cover Personal Data of individuals in most European countries, as well as data used and stored in those nations. Individuals in those areas have a legal right to keep their personal information private, and to direct the ways in which their information may be used. That personal information may only be used with the clear consent of the identified individual. Personal Data includes each person’s name address, email address, and other private information.

GDPR is having a much wider impact on the meetings industry than many other types of businesses given the meetings industry global footprint. Since meeting attendees come from all parts of the globe, and do business around the world, GDPR's requirements must be observed for more than just Europeans, or for businesses headquartered in Europe. All those in the industry – including hotels, DMCs, convention bureaus, and planners – must consider the implications.

Businesses subject to GDPR may have different responsibilities, depending upon how they handle Personal Data. A “Controller” determines the purposes and means for “processing” Personal Data – collection, storage, use, and disclosure, or any other operation performed on that data. A “Processor” is an entity that processes Personal Data for the Controller.

In the meetings industry, a meeting planner is likely a Controller, since the planner directs personal information about guests to hotels, transportation companies, and other service providers. Hotels may also use the guest information they collect, so they may be Controllers as well. An event registration company, which collects and uses Personal Data, would likely be a Processor.

The GDPR enumerates six lawful justifications for processing personal data and requires that all data must be processed under one of these justifications:

- **consent** of the data subject
- processing necessary to protect **vital interests**
- processing necessary to perform a **contract**
- processing necessary for a task carried out in the **public interest**
- processing necessary to comply with a **legal obligation**
- processing necessary for the **legitimate interests** of the Controller

Perhaps the most important is that a business must secure knowing and affirmative opt-ins from each individual whose Personal Data will be used. This means that a person must purposefully check

Meeting professionals must be particularly vigilant to comply with GDPR, as many parties involved with planning are provided with Personal Data of attendees such as names, email addresses, and credit card numbers.

“I agree” to each way a business might use his data, including for mailing lists, email blasts, and sharing data with marketing partners. If a person is already in a list of contacts, the business must secure her consent before continuing to use her personal data. Violations of GDPR may mean substantial fines for the offending business.

Businesses with no connections to individuals in Europe may have no need to comply with GDPR. The same can be said for companies that do no business in Europe, or with European businesses. But meeting industry stakeholders are likely to be subject to the law given the inherent global reach of meetings and travel, so they should take steps towards compliance to avoid potential fines.

Meeting professionals must be particularly vigilant to comply with GDPR, as many parties involved with planning are provided with Personal Data of attendees such as names, email addresses, and credit card numbers. Planning companies, meeting sponsors, hotels, transportation companies, and others receiving Personal Data all have their own responsibilities for handling that data appropriately pursuant to GDPR. Those receiving the data directly from attendees must also ensure



that the information they transfer to vendors and others will be protected.

Among the critical steps businesses should take:

- Post a clear and concise GDPR-compliant privacy policy on event registration websites.
- This policy must inform individuals how their Personal Data will be used, and their rights to have that data modified and/or deleted.
- Secure knowing and freely-given consents from individuals prior to using their Personal Data.
- Ensure that there is a legitimate reason to collect Personal Data from individuals, and that only the Data required is collected.
- Adopt effective methods for safeguarding Personal Data received from individuals.
- Ensure that contractors, business partners, and others with whom a business shares Personal Data have adequate protections in place to properly handle and protect that information.

GDPR compliance can be a cumbersome task for businesses that need to comply. But like every law,

compliance is mandatory when Personal Data of covered individuals is involved. Consult with your compliance officer to ensure that this important regulation is properly followed.

Emergency Planning

Recent incidents highlight the need for thoughtful and comprehensive emergency planning around meetings. The past year our society endured mass shootings, terrorism (both domestic and international), unusually harsh weather, and civil unrest. Responsible meeting planning now includes preparing for a calamity. Meeting planners should take precautions, even if the odds of something happening seem remote.

Meeting host organizations are ultimately responsible for emergency planning. But planners frequently take on this task on the host organization's behalf, lending their expertise to ensure that a comprehensive emergency plan is developed.

Proper planning should start with a site visit. Planners should consider what issues might arise at a meeting venue based on experience, such

as attendees' safety concerns while walking city streets from a hotel to the venue, and possible thefts occurring in hotel rooms and function space.

In addition, planners also need to protect against things that could happen. This includes acts of violence, spontaneous civil unrest, medical emergencies, and extreme weather events. Although it may be unlikely that an incident could happen, there are reasonable precautions planners and meeting host organizations can take to prevent injuries and damages, or at least minimize them.

Among the steps to be taken, planners should check for prior incidents at a meeting location. Some areas have higher rates of crime, and others may be more prone to flooding or other natural disasters.

Thought should also be given during the initial planning stages to risks created by meeting attendees and speakers. For example, an event allowing guests to carry firearms that includes social gatherings with alcohol may need to take extra security precautions. Also, a program with a high-profile controversial speaker may need additional security as well.

The costs and means of emergency planning can change rapidly. Before the 2017 concert shooting in Las Vegas, planning for large outdoor events typically involved security to monitor entrances and exits, and possibly crowd control officers. Emergency medical personnel were required mainly to respond to heart attacks and minor injuries that can affect attendees.

After the 2017 shooting in Las Vegas, emergency planning has taken on additional meaning. Planners should consider whether an event is vulnerable to attack however unlikely, and whether planned security measures would be appropriate to prevent a calamity. Access to the event venue for medical personnel responding to a crisis situation should also be considered. No amount of emergency planning can guarantee attendees' safety; but thorough pre-planning can materially reduce the risks.

The means and costs for security and emergency planning should be considered as part of RFPs and during site visits. Costs can be considerable in some cases, so they should be factored into the overall event budget for a meeting location.

A crisis plan is also essential for most meetings. This includes emergency evacuation plans for the meeting venue, which are often available from venue management. A crisis plan should also include emergency communications plans, both for attendees to reach event organizers, and for friends and family of attendees to keep abreast of developments affecting their loved ones. Social media can be an important part of any plan.

The 2017 hurricane in Puerto Rico illustrates the value of a crisis plan. The storm wiped out power and some phone service across the island. If a meeting was in progress when the hurricane hit, a proper crisis plan would have included a way for friends and family of attendees to confirm that each attendee was well. For instance, they might be directed to contact a designated representative of the meeting organizer, or check a meeting website set up to include attendee status information. A crisis plan should also have included a location for attendees to shelter in place, given the likelihood that severe weather might occur during Puerto Rico's hurricane season.

Meeting contracts are critical tools for emergency planning. They are essential for allocating responsibility for security measures and the costs for those efforts. Contracts should also include solid indemnification provisions which protect each party from damages and litigation arising from the other party's mistakes. Proper insurance is critical as well, in amounts and types sufficient to cover liability.

Codes of Conduct

Recent publicity over sexual harassment incidents highlights the need to address improper behavior at meetings. The failure to prevent incidents from arising, and to address them properly when they occur, has led to numerous lawsuits and bad publicity for both individuals and organizations.

Improper behavior is not limited to sexual harassment. Also included are issues arising from bullying, firearms, smoking (cigarettes, e-cigarettes, and marijuana), social media postings, and alcohol consumption. Any behavior that a meeting host finds objectionable to the proper conduct of the event and attendees' comfort may be addressed in an effort to minimize problems.

The most effective way to regulate attendee behavior is a written Code of Conduct. This document should include 3 pieces of essential information: (1) A description of behaviors that are prohibited at meetings and events, such as harassment, excessive drinking and other conduct; (2) Instructions for how an attendee should report improper conduct; and (3) The steps the organization will take to investigate a complaint and respond to offending conduct.

Once a Code of Conduct is created, it must be published to attendees. This may be done by posting the Code on the organization's website and the meeting registration website, by sending copies to attendees by mail, and by posting the Code onsite at the event. Unless the attendees are given the Code of Conduct and asked to review it, there is little chance its important rules will be followed.

Consider how a Code of Conduct can help avoid difficult situations. Many states allow people to carry firearms virtually anywhere, including hotels and restaurants. In those areas, therefore, meeting attendees would have the right to bring a gun or rifle with them to the event. Should a meeting host have a policy of prohibiting weapons, the best way to enforce that policy would be to include it in a Code of Conduct to be circulated to attendees in advance. That way attendees would be on notice not to bring their guns to a meeting, and possible onsite confrontations over enforcement of the policy could be avoided.

A critical part of a Code of Conduct is investigation and enforcement of complaints. Attendees must have a contact person to whom they can report improper conduct, who will act promptly to investigate the situation and take corrective action.

This is also important from a legal perspective. If a complaint is made but no action is taken, an affected meeting attendee may bring a legal action for perceived injuries caused by the organization's failure to prevent and then stop the offending conduct.

Recent news illustrates the importance of a proper investigation and follow-up action. Hollywood actors and government employees have accused superiors of improper sexual advances, and further complained that there was no one at their place of employment to investigate complaints and take action. Businesses throughout the country now recognize the need to stop abusive conduct, and to investigate it and take action when it occurs. The meetings industry should be no different.

Conclusion

Critical legal aspects of meetings continue to change and evolve. We cannot predict how forces both inside and outside the industry will impact the way business will be conducted in the months and years ahead. But it is essential that meeting professionals proactively adapt to these changes, to avoid increasing liability exposure due to changing legal requirements and unanticipated harms.

Note: The information in this article does not constitute legal advice. Please contact an attorney for legal advice on the subjects discussed.

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Methodology

To develop this 2019 Global Meetings and Events Forecast, a number of sources were used, including proprietary American Express Meetings & Events data sources, licensed third-party data and industry information, as well as interviews with industry leaders. Information and data was gathered from actual and planned meetings activity of American Express Meetings & Events globally. Proprietary surveys of meeting professionals were conducted to gather trends across North America, Europe, Asia Pacific and Central and South America. A survey of leading hotel and airline suppliers as well as follow-up interviews were also used to inform the findings in this forecast. Data was collected based on US Dollars across all regions and dollar amounts in tables throughout this forecast indicate amounts in US Dollars.

Global

MEETING ACTIVITY

Meetings Activity by Type

Percentage of total meetings

Internal meetings, including training, remain the largest category of meetings, particularly in the North American region. Incentives and special events, along with product launches, have the lowest incidence - typically below 15% for most regions.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	30%	24%	26%	23%
Product Launch (Internal/External)	13%	13%	13%	14%
Conference/Tradeshaw	15%	18%	12%	16%
Senior Leadership Meeting/Board Meeting	16%	15%	19%	16%
Client/Customer Advisory Board	15%	18%	14%	16%
Incentive/Special Event	11%	12%	17%	15%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Meetings Activity Levels

2019 vs. 2018

There is growth across meeting types in most regions. Only internal and training meetings in Asia Pacific are expected to demonstrate a slight decrease in 2019.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	1.23%	0.64%	-0.09%	-0.79%
Product Launch (Internal/External)	1.19%	1.15%	-0.05%	0.52%
Conference/Tradeshaw	0.50%	0.65%	1.39%	0.56%
Senior Leadership Meeting/Board Meeting	1.11%	0.92%	0.69%	-0.14%
Client/Customer Advisory Board	1.33%	1.55%	1.93%	0.18%
Incentive/Special Event	0.86%	0.77%	1.77%	0.69%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Number of Attendees

2019 vs. 2018

Across all regions and categories, meetings professionals expect to have more attendees at their events. Global hoteliers have a similar outlook, with emphasis on growth in volume for conferences and tradeshows as well as incentives and special events.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Internal Team Meeting/Training	1.07%	0.98%	0.89%	0.12%	0.94%
Product Launch (Internal/External)	1.49%	1.08%	1.37%	0.77%	1.44%
Conference/Tradeshow	0.73%	0.88%	1.52%	0.61%	2.29%
Senior Leadership Meeting/Board Meeting	0.77%	0.62%	1.43%	1.00%	1.00%
Client/Customer Advisory Board	1.47%	1.53%	2.25%	0.79%	1.35%
Incentive/Special Event	1.31%	1.57%	2.10%	1.20%	2.35%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Days per Meeting

2019 vs. 2018

Meetings professionals expect most meetings to be longer, with the exception of internal and training meetings, which are only expected to lengthen in Central and South America.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Internal Team Meeting/Training	0.06%	0.18%	0.94%	0.12%	-0.78%
Product Launch (Internal/External)	1.03%	0.78%	1.00%	0.17%	1.00%
Conference/Tradeshow	0.39%	0.77%	1.43%	0.80%	0.67%
Senior Leadership Meeting/Board Meeting	0.95%	0.59%	0.86%	0.79%	0.78%
Client/Customer Advisory Board	0.61%	1.14%	0.45%	0.53%	0.72%
Incentive/Special Event	0.92%	0.83%	1.89%	0.89%	0.83%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Cost per Attendee (excluding air cost)

2019

With a change in the survey question for 2018, there is a significant increase in reported cost per attendee. Updated estimates are consistent regarding the relatively higher spend for incentives and special events, across regions.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	\$1,259	\$1,004	\$1,394	\$1,576
Product Launch (Internal/External)	\$1,463	\$1,434	\$1,942	\$1,785
Conference/Tradeshow	\$1,223	\$1,571	\$1,640	\$1,910
Senior Leadership Meeting/Board Meeting	\$1,434	\$1,446	\$1,817	\$1,907
Client/Customer Advisory Board	\$1,336	\$1,400	\$1,634	\$1,757
Incentive/Special Event	\$1,679	\$1,590	\$2,070	\$1,957

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Cost per Attendee

2019 vs. 2018

Cost per attendee is expected to be somewhat higher in 2019 for all categories except internal team and training meetings. Incentives and special events are expected to increase most, while Asia Pacific and Central and South America anticipating greater increases than North America and Europe.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	0.66%	-0.09%	1.65%	0.09%
Product Launch (Internal/External)	0.80%	0.55%	1.78%	1.96%
Conference/Tradeshow	0.81%	0.59%	1.30%	1.97%
Senior Leadership Meeting/Board Meeting	0.86%	0.67%	0.55%	0.97%
Client/Customer Advisory Board	0.77%	1.02%	1.30%	1.19%
Incentive/Special Event	1.08%	0.89%	1.89%	1.66%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Group Hotel Rates

2019 vs. 2018

Average daily rates for hotels are expected to increase across all regions, with the highest estimates provided by industry professionals in North America and hotel suppliers.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
	2.41%	1.61%	0.96%	1.11%	2.29%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Overall Meeting Spend Within Organizations

2019 vs. 2018

Anticipated increases in spending are less than 1%, with a slight decrease expected in Europe.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
	0.80%	-0.65%	0.26%	0.86%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

HOTELS AND MEETING SPACE

Property Type Demand

2019 vs. 2018

Global hotelier respondents expect the strongest increase in demand for mid-tier properties, followed by non-traditional meetings facilities.

	GLOBAL HOTELIERS
Resort Properties	0.69%
Luxury Properties	1.07%
Mid-Tier Properties	3.20%
Lower-Tier Properties	-0.14%
Non-Traditional Meetings Facilities	2.69%
Cruises	1.78%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Group Space Availability

YOY percentage change

Anticipated increases in group space availability are flat in 2019 except for planners in Europe and Global Hotelier respondents. Space availability expands in 2020 for all regions.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
2019	-0.01%	0.69%	-0.35%	-0.01%	2.20%
2020	0.93%	1.36%	1.20%	1.06%	3.30%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Property Type Usage

As a percentage of meetings

Mid-tier properties remain the preferred hotel type for planners across all regions, particularly in North America and Europe.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Resort Properties	15%	9%	20%	18%
Luxury Properties	12%	13%	11%	16%
Mid-Tier Properties	47%	47%	29%	36%
Lower-Tier Properties	11%	11%	13%	12%
Non-Traditional Meetings Facilities	12%	15%	17%	10%
Cruises	2%	5%	10%	7%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Hotel Openings (Midscale to Luxury Segments)

2016-2019

The number of yearly hotel openings continues to increase for Europe, Asia Pacific, and the Middle East. South America remains flat over 2018 and there is slowing activity in Africa.

	2019	2018	2017	2016
Europe	655	615	434	404
Asia Pacific	764	650	542	447
Middle East	249	226	196	183
North & Central America	563	538	538	731
South America	56	55	81	81
Africa	62	106	102	95

TOPHOTELPROJECTS GmbH, as of August 2018

4- & 5- Star Hotels Under Construction 2016-2019

2016-2019

Construction of 4- and 5-star hotels is stable or slowing somewhat in 2019 after a period of acceleration. Activity in North and Central America and Europe shows the biggest decrease.

	2019	2018	2017	2016
Europe	1237	1587	1409	1070
Asia Pacific	1735	1737	1565	1400
Middle East	450	652	566	496
North/Central America	993	1364	1364	1399
South America	136	162	170	328
Africa	227	340	329	271

TOPHOTELPROJECTS GmbH, as of August 2018

Ratio of Midscale to Luxury Hotel Openings 2016–2018

Number of midscale hotel openings for every luxury hotel opening. Mid-tier properties continue to dominate construction in Europe and North/Central America.

	2019	2018	2017	2016
Europe	3.23	3.34	2.81	2.15
Asia Pacific	1.22	1.02	0.85	0.83
Middle East	1.47	1.02	1.02	0.81
North/Central America	3.27	2.39	3.45	2.60
South America	2.50	1.84	2.24	1.36
Africa	0.55	0.83	0.73	0.75

TOPHOTELPROJECTS GmbH, as of August 2018

Terms Hotels Are Willing to Negotiate in Contract

2019

Global hotelier respondents are most interested in negotiating amenities and room rates, and least open to negotiating resort fees and A/V costs.

	GLOBAL HOTELIERS
Discounted audio/visual	40%
Hotel room rates	88%
Complimentary meetings space	69%
Food & beverage upgrades or discounts	71%
Free or discounted WiFi	65%
Attrition clauses	65%
Cancellation penalties	59%
Free or upgraded amenities	94%
Resort fees	38%
Service charges	47%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Top Impacts of Increased Hotel Merger and Acquisition Activity

2019

Planners report that hotel consolidation is impacting commission rates and leading to more challenging contract negotiations.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Change in key contacts	29%	30%	33%	44%
Re-flagging of local properties	19%	19%	41%	28%
Lower commission rates	68%	50%	50%	57%
More challenging contract negotiations	67%	52%	39%	41%
Erosion of group program points	14%	15%	30%	25%
Slower RFP Response Rates	19%	24%	24%	23%
Changes in contractual terms and conditions	50%	46%	26%	28%
Easier to establish a global preferred hotel program	13%	29%	28%	23%
Increased investment in meetings technology	10%	18%	20%	19%
Increased investment in hotel renovations	11%	17%	9%	11%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Hotel Openings: Top 3 Cities per Region

2019

New York and London are the top cities for openings in North America and Europe, respectively. Dubai continues to dominate the Middle East, while Shanghai leads in Asia.

CITY NAME	# OF HOTEL OPENINGS
North America	
New York	32
Nashville	20
Los Angeles	16
Europe	
London	28
Munich	14
Dublin	13
Middle East	
Dubai	54
Doha/Riyadh	17
Jeddah	16
Asia	
Shanghai	22
Chengdu	17
Sanya	14
South America	
Lima	4
Mendoza	3
São Paulo	3
Africa	
Addis Ababa	6
Sharm El-Sheikh	4
Cairo/Nairobi/ Marrakech	3

TOPHOTELPROJECTS GmbH, as of August 2018

Top Cities for Hotel Openings

2019

Dubai is the world leader for new hotel openings in 2019, followed by New York and London.

CITY NAME	# OF HOTEL OPENINGS
Dubai	54
New York	32
London	28
Shanghai	22
Nashville	20
Chengdu/Doha/Riyadh	17
Jeddah/Los Angeles	16
Munich/Sanya	14
Dublin/Istanbul	13
Changsha	12

TOPHOTELPROJECTS GmbH, as of August 2018

AIR

Group Air Rates

2019 vs. 2018

Planners across all regions expect group air rates to increase in 2019. Group air specialists expect rates to rise more than do planners.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GROUP AIR SPECIALISTS
2019	2.11%	1.86%	2.16%	1.00%	2.63%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Regional Group Air Rates

2019 vs 2018

Planners expect group air rates to increase the most for international fares. North America, Eastern Europe, and the Middle East are all expected to have increased fares.

North America	1.38%
Eastern Europe	1.28%
Western Europe	0.40%
Asia Pacific	0.30%
Central America	0.90%
South America	0.60%
Middle East	1.09%
Africa	0.30%
International (Across Continents)	2.10%

American Express Meetings & Events Group Air Expert Survey, 2018

Group Air Booking Resources Used Most Frequently

2019

Planners frequently expect to work with an internal group air specialist. Respondents in Central/South America and Asia Pacific also frequently work directly with the airline.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Direct arrangements with airline	16%	34%	40%	40%
Internal group air specialist	36%	41%	36%	54%
Meetings management supplier	20%	21%	34%	31%
Travel management company	31%	20%	21%	23%
Other (please specify)	13%	5%	4%	0%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Types of Deals Airlines Prefer to Negotiate

2019

Airlines prefer to negotiate both types of rates - flat rates from a single destination and mini route deals and conference window rates.

Flat rate from one destination	25%			
Mini route deals/conference window rates	25%			
Both flat rate from one destination and mini routes deals/conference window rates	31%			
Other (please specify)	19%			

American Express Meetings & Events Group Air Expert Survey, 2018

Group Air Rates Influence on Destination Choice

2019

Air rates have significant influence on destination choice for planners in Central and South America. In all other regions group air rates typically have “some” influence on destination selection.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Significant influence	24%	28%	53%	39%
Some influence	54%	40%	38%	48%
No influence	22%	32%	9%	13%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Percentage of Meetings That Include Group Air Management

2019

Planners across regions frequently work with Group Air Management when operating their meetings, although planners in Central & South America and Asia Pacific are somewhat less likely to be using Group Air Management for a high percentage of their meetings.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
0%	8%	9%	4%	7%
1-10%	18%	19%	12%	15%
11-25%	22%	21%	16%	26%
26-50%	15%	26%	35%	31%
51-75%	18%	14%	27%	14%
76-100%	18%	11%	6%	7%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Regional Capacity and Volume

2019 vs 2018

Group Air experts surveyed expect capacity to increase in all markets, most notably in Eastern Europe. Volume increases are expected to be highest in North and Central America as well as Eastern Europe.

	CAPACITY	VOLUME
Africa	0.92%	0.82%
Asia	1.92%	2.82%
Southeast Asia	1.42%	1.82%
Central America	1.27%	3.00%
North America	2.00%	3.69%
South America	1.27%	2.36%
Mexico	1.82%	2.27%
Western Europe	1.93%	2.71%
Eastern Europe	2.21%	3.08%
Middle East	1.54%	1.75%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

TRENDS

Top Factors Influencing Meeting Location

2019

Planners in North America and Europe consider air lift and location requirements when selecting a destination, while those in Central & South America and Asia Pacific consider economic and political safety.

	Top 2 Factors				
	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Economic/political instability concerns	16%	21%	30%	39%	12%
Currency/exchange rate	6%	15%	28%	15%	6%
Online reviews	9%	10%	17%	23%	18%
Safety concerns	19%	21%	24%	22%	35%
Perceptions around “resort” destinations for meetings	14%	10%	13%	20%	6%
Participation in company or organization’s preferred supplier program	22%	17%	20%	18%	18%
Past experience of colleague	9%	13%	13%	25%	18%
Ease of air lift / transportation to location for attendees	32%	26%	17%	12%	53%
Client directive based on past experience	22%	12%	11%	5%	6%
Repeat destination for meeting	15%	16%	9%	8%	0%
Specific location type needed – airport, near training facility, near customer location, etc.	37%	37%	19%	15%	29%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Difficulty of Meetings Approval Process

2019

Planners across all regions are consistent - internal team and training meetings are the easiest to receive approval for, while incentives and special events are the most difficult.

EASIEST

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
	Internal Team Meeting/ Training	Internal Team Meeting/ Training	Internal Team Meeting/ Training	Internal Team Meeting/ Training

HARDEST

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
	Incentive/ Special Events	Incentive/ Special Events	Incentive/ Special Events	Incentive/ Special Events

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Mobile App Usage

2019 vs 2018

Use of mobile apps continue to increase across all regions, with North America leading the way.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
	2.91%	1.79%	2.44%	2.07%	3.40%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Most Compelling Reason to Use Mobile App

2019

Planners are using mobile apps to increase attendee engagement and facilitate communication.

Most compelling reason

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Improve communications	39%	41%	42%	28%	41%
Improve engagement of attendees	44%	35%	33%	34%	53%
Facilitate networking among attendees	19%	21%	33%	38%	24%
Measure effectiveness of presentations	13%	15%	16%	16%	12%
Measure event effectiveness overall	21%	26%	20%	22%	18%
Communicate with attendees regarding changes or emergencies	34%	30%	29%	28%	41%
Deliver documents electronically	26%	25%	22%	27%	12%
Compliance measurement	5%	8%	6%	7%	0%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Mobile App Features: Very Important to the Success of Meetings

2019

Agenda sharing and push notifications are commonly-noted features of mobile apps that contribute to the success of a meeting, according to planners.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Gamification	11%	11%	20%	18%
Floor maps	33%	25%	35%	23%
1:1 messaging	22%	21%	43%	21%
Channels for subject- specific conversations	12%	16%	35%	26%
iBeacon – see who is nearby	7%	6%	28%	13%
Agenda	59%	52%	54%	41%
Surveys/Polls	35%	30%	37%	25%
Send messages and reminders to attendees	49%	44%	56%	32%
Speaker profiles	21%	22%	37%	27%
Take Session Notes	18%	20%	44%	24%
Analytics to measure event success	37%	34%	48%	32%
Hosted .pdf documents/presentations	27%	31%	41%	26%
QR code scanner	17%	16%	39%	25%
Session attendance scanning	28%	29%	31%	25%
Upcoming session reminders	37%	33%	43%	26%
Session Q&A	37%	30%	41%	34%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Virtual/Hybrid Meetings Usage

Placement in more than 10% of 2019 meetings

Planners in Central and South America and Asia Pacific have the highest adoption rates for virtual and hybrid meetings.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
	43%	49%	76%	70%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Approach to Incentive and Special Events

Audience invited to 2019 incentives

Planners in North America are the most likely to allow incentive attendees to invite a “plus one” on the incentive.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Main attendee only (employee, incentive winner, etc.)	44%	66%	54%	57%
Main attendee may bring a 'plus one'	47%	28%	37%	39%
Main attendee may bring family	5%	3%	9%	4%
Other	5%	4%	0%	0%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Meeting Management Components in Place

Percentage of planners indicating these components are in place.

Planners in North America and Europe have made good progress getting meeting management components put in place for their organizations. Their counterparts in Central and South America and Asia Pacific are trailing but still have good results.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Overarching strategy for managing meetings	78%	65%	58%	46%
Formal policy for meetings	69%	70%	56%	51%
Centralized staff to support meeting planning and execution	72%	66%	56%	48%
Approval process for meetings	78%	72%	68%	56%
Specific technology or software in place for managing meetings	71%	55%	47%	44%
Centralized contracting with preferred vendors	64%	65%	54%	47%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Explicitly Defined Policies in Place

Percentage of planners indicating components are in place and explicitly defined.

Explicitly defining meeting management components is more difficult to achieve. Achievement rates drop across all regions, with the most success shown in approval processes for meetings.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Overarching strategy for managing meetings	39%	47%	29%	25%
Formal policy for meetings	42%	52%	42%	27%
Centralized staff to support meeting planning and execution	42%	41%	31%	20%
Approval process for meetings	54%	55%	45%	25%
Specific technology or software in place for managing meetings	46%	39%	30%	22%
Centralized contracting with preferred vendors	41%	42%	38%	32%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Challenging to meet new GDPR standards

Percentage of planners agreeing that meeting each of the GDPR standards is challenging

A significant proportion of planners are challenged by the GDPR requirements, particularly those in Europe, Central and South America, and Asia Pacific. Planners in Europe feel centralized data management is most difficult, while those in Central and South America and Asia Pacific find designated oversight the most challenging.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Centralized Data Management	32%	50%	42%	43%
Consent	31%	44%	46%	43%
Designated Oversight	29%	43%	56%	58%

American Express Meetings & Events North American, European, Asia Pacific, and Central/South American Surveys, 2018

Regional

NORTH AMERICA

Meetings Activity by Type

Percentage of all meetings

Internal meetings, including training, remain the largest category of meetings in North America, driven by considerable volume in the US

	NORTH AMERICA	US	CANADA
Internal Team Meeting/Training	30%	32%	22%
Product Launch (Internal/External)	13%	13%	13%
Conference/Tradeshow	15%	14%	21%
Senior Leadership Meeting/Board Meeting	16%	17%	13%
Client/Customer Advisory Board	15%	15%	17%
Incentive/Special Event	11%	10%	13%

American Express Meetings & Events North American Survey, 2018

Meetings Activity Levels

2019 vs. 2018

There is growth across most meeting types in North America. Only internal team and training meetings in Canada are expected to decrease in 2019.

	NORTH AMERICA	US	CANADA
Internal Team Meeting/Training	1.23%	1.70%	-0.56%
Product Launch (Internal/External)	1.19%	1.19%	1.17%
Conference/Tradeshow	0.50%	0.47%	0.63%
Senior Leadership Meeting/Board Meeting	1.11%	1.09%	1.20%
Client/Customer Advisory Board	1.33%	1.44%	0.96%
Incentive/Special Event	0.86%	0.66%	1.64%

American Express Meetings & Events North American Survey, 2018

Number of Attendees

2019 vs. 2018

Across North America, all meeting categories are expected to see a moderate increase in attendance in 2019, with the largest increase expected for product launch meetings in Canada.

	NORTH AMERICA	US	CANADA
Internal Team Meeting/Training	1.07%	1.24%	0.38%
Product Launch (Internal/External)	1.49%	1.29%	2.18%
Conference/Tradeshow	0.73%	0.79%	0.50%
Senior Leadership Meeting/Board Meeting	0.77%	0.78%	0.71%
Client/Customer Advisory Board	1.47%	1.40%	1.71%
Incentive/Special Event	1.31%	1.10%	2.19%

American Express Meetings & Events North American Survey, 2018

Days per Meeting

2019 vs. 2018

Meetings professionals in North America expect most meetings to be somewhat longer, with the exception of internal and training meetings.

	NORTH AMERICA	US	CANADA
Internal Team Meeting/Training	0.06%	0.15%	-0.35%
Product Launch (Internal/External)	1.03%	0.99%	1.17%
Conference/Tradeshow	0.39%	0.20%	1.13%
Senior Leadership Meeting/Board Meeting	0.95%	0.80%	1.58%
Client/Customer Advisory Board	0.61%	0.52%	0.92%
Incentive/Special Event	0.92%	0.66%	1.95%

American Express Meetings & Events North American Survey, 2018

Cost per Attendee (excluding air cost)

In US dollars

With a change in the survey question for 2018, there is a significant increase in reported cost per attendee. Costs are higher in Canada than in the US, across all meeting types.

	NORTH AMERICA	US	CANADA
Internal Team Meeting/Training	\$1,259	\$1,196	\$1,479
Product Launch (Internal/External)	\$1,463	\$1,309	\$1,893
Conference/Tradeshow	\$1,223	\$1,054	\$1,786
Senior Leadership Meeting/Board Meeting	\$1,434	\$1,370	\$1,663
Client/Customer Advisory Board	\$1,336	\$1,223	\$1,652
Incentive/Special Event	\$1,679	\$1,522	\$2,213

American Express Meetings & Events North American Survey, 2018

Cost per Attendee

2019 vs. 2018

Cost per attendee is expected to increase in 2019 - across all meeting categories and areas in North America. Costs are rising faster in Canada than in the US

	NORTH AMERICA	US	CANADA
Internal Team Meeting/Training	0.66%	0.64%	0.75%
Product Launch (Internal/External)	0.80%	0.70%	1.10%
Conference/Tradeshows	0.81%	0.65%	1.36%
Senior Leadership Meeting/Board Meeting	0.86%	0.68%	1.55%
Client/Customer Advisory Board	0.77%	0.54%	1.55%
Incentive/Special Event	1.08%	0.61%	2.85%

American Express Meetings & Events North American Survey, 2018

Cost Area Cut First in Meeting Budget

(and still maintain customer experience)

Meeting planners in North America are most likely to reduce number of nights for a meeting if budgets need to be reduced. Offsite evening events and optional activities are also possible targets.

	NORTH AMERICA (2019)
Number of nights	20%
Registration site	3%
Ground transportation	8%
Communication	2%
Offsite evening events	18%
Offsite optional activities	17%
Audio visual	2%
Food & beverage	11%
Onsite travel staff	4%
Room drops	7%
Use of Destination Management Company (DMC)	8%

American Express Meetings & Events North American Survey, 2018

Preferred Area of Investment

(if overall meetings budget increased 10%)

Compared to their global colleagues, meeting planners in North America are most likely to focus on improving onsite experience if provided with a budget surplus.

	NORTH AMERICA
Increase number of meetings	23%
Increase number of attendees at meetings	16%
Increase number of days for meetings	9%
Improve onsite experience	33%
Improve content delivery	7%
Increase use of technology	10%
Other	4%

American Express Meetings & Events North American Survey, 2018

Overall Meeting Spend Within Organizations

2019 vs. 2018

Although overall meeting spend is increasing, it is likely insufficient to cover anticipated increases in per-attendee costs.

	NORTH AMERICA	US	CANADA
	0.80%	0.91%	0.34%

American Express Meetings & Events North American Survey, 2018

Primary Locations for Meetings

2019

Meeting planners in North America have a strong preference for large metropolitan destinations for their events.

	NORTH AMERICA
Large city locations	71%
Second-tier city locations	22%
Other	7%

American Express Meetings & Events North American Survey, 2018

Group Hotel Rates

2019 vs. 2018

Average group rates are expected to increase in both the US and Canada, rising faster than overall meeting spend.

	NORTH AMERICA	US	CANADA
	2.41%	2.66%	1.25%

American Express Meetings & Events North American Survey, 2018

Top 10 US Cities Based on Meetings & Events Activity

The top US meetings and events destinations saw some changes in 2018. Washington D.C. moved from sixth place to ninth, and Phoenix, Arizona was replaced in the 10th spot by San Francisco, California.

Orlando, Florida
Las Vegas, Nevada
Chicago, Illinois
San Diego, California
Atlanta, Georgia
Dallas, Texas
Nashville, Tennessee
New York, New York
Washington, DC
San Francisco, California

Cvent, 2018

EUROPE

Meetings Activity by Type

Percentage of total meetings

Internal meetings and training are the most prevalent type of meeting in most of the countries surveyed, with the exception of Germany, where customer advisory boards take the lead.

	EUROPE	UK	GERMANY	FRANCE	BELGIUM/ NETHERLANDS	SPAIN	DENMARK/ SWEDEN	POLAND	SWITZERLAND
Internal Team Meeting/Training	24%	27%	16%	28%	20%	28%	24%	19%	21%
Product Launch (Internal/External)	13%	10%	12%	12%	16%	15%	19%	15%	11%
Conference/Tradeshaw	18%	17%	22%	22%	17%	13%	18%	19%	21%
Senior Leadership Meeting/Board Meeting	15%	18%	11%	15%	17%	14%	8%	14%	18%
Client/Customer Advisory Board	18%	18%	28%	12%	16%	20%	22%	16%	16%
Incentive/Special Event	12%	10%	10%	12%	16%	10%	9%	17%	13%

American Express Meetings & Events European Survey, 2018

Meetings Activity Levels

2019 vs. 2018

There is growth across meeting types in most countries surveyed, with Germany, Spain, and Poland the most optimistic about increased activity in 2019.

	EUROPE	UK	GERMANY	FRANCE	BELGIUM/ NETHERLANDS	SPAIN	DENMARK/ SWEDEN	POLAND	SWITZERLAND
Internal Team Meeting/Training	0.64%	1.21%	0.86%	0.31%	0.35%	0.82%	1.31%	0.85%	0.09%
Product Launch (Internal/External)	1.15%	1.44%	4.00%	-0.40%	0.65%	3.47%	1.53%	1.25%	-0.59%
Conference/Tradeshaw	0.65%	0.65%	2.09%	-2.08%	-0.11%	1.70%	0.25%	1.90%	0.78%
Senior Leadership Meeting/Board Meeting	0.92%	0.61%	-0.14%	0.92%	1.39%	1.50%	0.00%	1.67%	0.78%
Client/Customer Advisory Board	1.55%	1.00%	1.89%	0.00%	1.88%	2.59%	1.50%	2.70%	0.63%
Incentive/Special Event	0.77%	-0.31%	1.22%	-1.54%	1.83%	2.65%	0.55%	1.19%	1.20%

American Express Meetings & Events European Survey, 2018

Number of Attendees

2019 vs. 2018

Regionally, attendance is expected to increase for all meeting types in 2019, with incentives and customer advisory boards demonstrating the strongest outlook. Attendance in France and Denmark/Sweden is expected to decline.

	EUROPE	UK	GERMANY	FRANCE	BELGIUM/ NETHERLANDS	SPAIN	DENMARK/ SWEDEN	POLAND	SWITZERLAND
Internal Team Meeting/Training	0.98%	1.00%	0.69%	0.00%	1.00%	1.82%	0.40%	1.25%	1.22%
Product Launch (Internal/External)	1.08%	1.71%	1.00%	-1.20%	1.83%	3.06%	-0.63%	1.42%	0.50%
Conference/Tradeshaw	0.88%	1.17%	-1.60%	-1.46%	2.05%	2.19%	-0.79%	1.43%	1.52%
Senior Leadership Meeting/Board Meeting	0.62%	0.94%	4.83%	-0.18%	0.32%	2.14%	-0.36%	0.24%	-0.32%
Client/Customer Advisory Board	1.53%	1.53%	3.00%	-0.22%	1.38%	1.72%	1.23%	1.37%	1.92%
Incentive/Special Event	1.57%	3.14%	2.22%	0.00%	1.11%	3.69%	0.08%	1.48%	2.15%

American Express Meetings & Events European Survey, 2018

Days per Meeting

2019 vs. 2018

Meetings professionals expect most meetings to be longer, with the exception of internal and training meetings, which will remain flat. Germany is looking to expand meetings, while Denmark/Sweden expects meeting length to be reduced slightly in 2019.

	EUROPE	UK	GERMANY	FRANCE	BELGIUM/ NETHERLANDS	SPAIN	DENMARK/ SWEDEN	POLAND	SWITZERLAND
Internal Team Meeting/Training	0.18%	1.33%	0.15%	-0.64%	0.24%	0.00%	-0.56%	0.27%	0.26%
Product Launch (Internal/External)	0.78%	1.55%	2.13%	0.17%	1.06%	0.47%	-0.18%	1.52%	0.45%
Conference/Tradeshaw	0.77%	0.91%	3.00%	0.13%	0.39%	-0.43%	-1.00%	1.64%	1.96%
Senior Leadership Meeting/Board Meeting	0.59%	0.35%	4.00%	0.00%	0.06%	-0.19%	-0.43%	1.36%	1.52%
Client/Customer Advisory Board	1.14%	1.55%	3.75%	0.55%	1.19%	0.67%	0.46%	0.81%	1.54%
Incentive/Special Event	0.83%	0.53%	2.56%	0.15%	0.28%	1.69%	-0.43%	1.55%	1.90%

American Express Meetings & Events European Survey, 2018

Cost per Attendee (excluding air cost)

In US dollars

With a change in the survey question for 2018, there is a significant increase in reported cost per attendee. Per-attendee costs are highest in Germany and Spain, and lowest in Denmark/Sweden and France.

	EUROPE	UK	GERMANY	FRANCE	BELGIUM/ NETHERLANDS	SPAIN	DENMARK/ SWEDEN	POLAND	SWITZERLAND
Internal Team Meeting/Training	\$1,004	\$1,056	\$1,018	\$636	\$900	\$1,213	\$850	\$1,375	\$989
Product Launch (Internal/External)	\$1,434	\$1,417	\$1,929	\$1,031	\$1,733	\$1,539	\$1,250	\$1,724	\$1,262
Conference/Tradeshaw	\$1,571	\$1,368	\$1,700	\$1,396	\$1,906	\$1,825	\$833	\$1,868	\$1,568
Senior Leadership Meeting/Board Meeting	\$1,446	\$1,162	\$1,917	\$944	\$1,550	\$1,931	\$850	\$1,724	\$1,587
Client/Customer Advisory Board	\$1,400	\$1,444	\$1,361	\$1,111	\$1,339	\$1,926	\$1,000	\$1,515	\$1,467
Incentive/Special Event	\$1,590	\$1,391	\$2,194	\$1,250	\$1,422	\$2,156	\$1,000	\$1,600	\$1,806

American Express Meetings & Events
European Survey, 2018

Cost per Attendee

2019 vs. 2018

Regionally, cost per attendee is expected to be slightly higher in 2019 for all categories except internal team and training meetings. France and Denmark/Sweden anticipate cost reductions across most meetings, while Belgium/Netherlands expects costs to increase.

	EUROPE	UK	GERMANY	FRANCE	BELGIUM/ NETHERLANDS	SPAIN	DENMARK/ SWEDEN	POLAND	SWITZERLAND
Internal Team Meeting/Training	-0.09%	0.24%	-1.33%	-1.31%	0.25%	-0.70%	-0.42%	1.15%	0.41%
Product Launch (Internal/External)	0.55%	0.75%	-1.29%	-0.55%	1.63%	0.88%	-0.38%	0.95%	1.29%
Conference/Tradeshaw	0.59%	0.53%	2.00%	-0.64%	2.06%	0.90%	-0.73%	0.67%	0.45%
Senior Leadership Meeting/Board Meeting	0.67%	-0.94%	0.17%	-0.67%	1.69%	1.58%	-0.17%	1.45%	1.21%
Client/Customer Advisory Board	1.02%	0.88%	-1.00%	-0.60%	1.40%	1.44%	0.30%	2.05%	1.57%
Incentive/Special Event	0.89%	-0.33%	0.63%	-0.85%	2.53%	1.50%	-0.38%	1.71%	2.00%

American Express Meetings & Events European Survey, 2018

Cost Area Cut First in Meeting Budget

(and still maintain customer experience)

When asked where cuts would be made if needed, planners in Europe indicate the overall number of nights would be the first place examined for opportunities to reduce costs.

	EUROPE (2019)
Number of nights	20%
Registration site	3%
Ground transportation	8%
Communication	4%
Offsite evening events	17%
Offsite optional activities	17%
Audio visual	7%
Food & beverage	9%
Onsite travel staff	7%
Room drops	8%
Use of Destination Management Company (DMC)	4%

American Express Meetings & Events European Survey, 2018

Preferred Area of Investment

(if overall meetings budget increased 10%)

If given an additional 10% in budget, planners in Europe would improve the onsite experience and increase the reach of their meetings through number of meetings and attendance.

	EUROPE
Increase number of meetings	25%
Increase number of attendees at meetings	20%
Increase number of days for meetings	15%
Improve onsite experience	25%
Improve content delivery	5%
Increase use of technology	9%
Other	2%

American Express Meetings & Events European Survey, 2018

Overall Meeting Spend Within Organizations

2019 vs. 2018

Spending is expected to decrease across the region, indicating fresh challenges for meeting planners in Europe. Only in Spain are budgets expected to increase in 2019.

	EUROPE	UK	GERMANY	FRANCE	BELGIUM/ NETHERLANDS	SPAIN	DENMARK/ SWEDEN	POLAND	SWITZERLAND
	-0.65%	-0.22%	-3.31%	-1.91%	-0.95%	1.41%	-0.90%	-0.62%	0.15%

American Express Meetings & Events European Survey, 2018

Primary Locations for Meetings

2019

Planners in Europe, like their colleagues in other regions, prefer large metropolitan destinations for their meetings.

EUROPE	
Large city locations	78%
Second-tier city locations	20%
Other	2%

American Express Meetings & Events European Survey, 2018

Group Hotel Rates

2019 vs. 2018

Average daily rates for hotels are expected to increase across most countries in Europe, particularly in Germany, the UK, and Denmark/Sweden.

EUROPE	UK	GERMANY	FRANCE	BELGIUM/ NETHERLANDS	SPAIN	DENMARK/ SWEDEN	POLAND	SWITZERLAND
1.61%	3.14%	3.43%	0.45%	0.32%	1.83%	2.39%	0.14%	1.62%

American Express Meetings & Events European Survey, 2018

Top 10 European Cities Based on Meetings & Events Activity

Top destinations in Europe are London, Barcelona, and Berlin. A broad number of countries are represented in the list.

London, England
Barcelona, Spain
Berlin, Germany
Amsterdam, Netherlands
Madrid, Spain
Paris, France
Frankfurt, Germany
Rome, Italy
Munich, Germany
Lisbon, Portugal

Cvent, 2018

ASIA PACIFIC

Meetings Activity by Type

Percentage of total meetings

Internal meetings, including training, remain the largest category of meetings, particularly in Australia. Incentives and special events are more prevalent in China/Hong Kong and Japan than in many other markets.

	ASIA PACIFIC	AUSTRALIA	CHINA/ HONG KONG	JAPAN
Internal Team Meeting/Training	23%	28%	21%	21%
Product Launch (Internal/External)	14%	10%	17%	15%
Conference/Tradeshaw	16%	15%	15%	16%
Senior Leadership Meeting/Board Meeting	16%	18%	14%	15%
Client/Customer Advisory Board	16%	16%	16%	16%
Incentive/Special Event	15%	12%	16%	17%

American Express Meetings & Events Asia Pacific Survey, 2018

Meetings Activity Levels

2019 vs. 2018

Growth expectations vary by country. Planners in Australia anticipate a modest decrease in activity, while planners in China and Hong Kong expect an increase in activity.

	ASIA PACIFIC	AUSTRALIA	CHINA/ HONG KONG	JAPAN
Internal Team Meeting/Training	-0.79%	-1.67%	0.57%	-1.04%
Product Launch (Internal/External)	0.52%	-0.96%	1.96%	0.90%
Conference/Tradeshaw	0.56%	-1.10%	1.87%	1.35%
Senior Leadership Meeting/Board Meeting	-0.14%	-1.41%	1.23%	0.14%
Client/Customer Advisory Board	0.18%	-1.08%	1.45%	0.43%
Incentive/Special Event	0.69%	-1.04%	2.81%	0.90%

American Express Meetings & Events Asia Pacific Survey, 2018

Number of Attendees

2019 vs. 2018

Similar to projections for activity, planners in Australia expect a slight decrease in meeting attendance, while the outlook in China and Hong Kong is decidedly positive.

	ASIA PACIFIC	AUSTRALIA	CHINA/ HONG KONG	JAPAN
Internal Team Meeting/Training	0.12%	-0.73%	1.91%	-0.18%
Product Launch (Internal/External)	0.77%	-0.48%	3.43%	-0.33%
Conference/Tradeshaw	0.61%	-0.38%	2.52%	0.00%
Senior Leadership Meeting/Board Meeting	1.00%	0.39%	1.64%	1.25%
Client/Customer Advisory Board	0.79%	-0.04%	2.18%	0.55%
Incentive/Special Event	1.20%	-0.09%	3.57%	0.65%

American Express Meetings & Events Asia Pacific Survey, 2018

Days per Meeting

2019 vs. 2018

Meeting length is expected to increase in China, Hong Kong, and Japan, while Australia anticipates somewhat shorter meetings in 2019.

	ASIA PACIFIC	AUSTRALIA	CHINA/ HONG KONG	JAPAN
Internal Team Meeting/Training	0.12%	-0.63%	2.13%	-0.45%
Product Launch (Internal/External)	0.17%	-1.75%	1.32%	1.33%
Conference/Tradeshow	0.80%	-0.10%	1.78%	1.00%
Senior Leadership Meeting/Board Meeting	0.79%	0.14%	1.82%	0.25%
Client/Customer Advisory Board	0.53%	-1.04%	2.36%	0.50%
Incentive/Special Event	0.89%	0.21%	1.90%	0.45%

American Express Meetings & Events Asia Pacific Survey, 2018

Cost per Attendee (excluding air cost)

In US dollars

With a change in the survey question for 2018, there is a significant increase in reported cost per attendee. Costs are highest in Japan and considerably lower in Australia.

	ASIA PACIFIC	AUSTRALIA	CHINA/ HONG KONG	JAPAN
Internal Team Meeting/Training	\$1,576	\$1,134	\$1,511	\$2,350
Product Launch (Internal/External)	\$1,785	\$1,708	\$1,793	\$1,975
Conference/Tradeshow	\$1,910	\$1,474	\$2,120	\$2,500
Senior Leadership Meeting/Board Meeting	\$1,907	\$1,208	\$2,250	\$2,434
Client/Customer Advisory Board	\$1,757	\$1,100	\$2,012	\$2,313
Incentive/Special Event	\$1,957	\$1,587	\$1,821	\$2,548

American Express Meetings & Events Asia Pacific Survey, 2018

Cost per Attendee

2019 vs. 2018

Planners expect the cost per attendee to increase in almost all segments, with notable projected increases in product launch meetings for China, Hong Kong, and Japan. Incentives in China and Hong Kong are also expected to increase considerably.

	ASIA PACIFIC	AUSTRALIA	CHINA/ HONG KONG	JAPAN
Internal Team Meeting/Training	0.09%	-0.84%	1.13%	0.57%
Product Launch (Internal/External)	1.96%	0.68%	2.61%	3.24%
Conference/Tradeshow	1.97%	1.55%	2.48%	2.40%
Senior Leadership Meeting/Board Meeting	0.97%	-0.52%	2.27%	1.38%
Client/Customer Advisory Board	1.19%	0.32%	2.09%	1.43%
Incentive/Special Event	1.66%	0.48%	2.71%	2.14%

American Express Meetings & Events Asia Pacific Survey, 2018

Cost Area Cut First in Meeting Budget

(and still maintain customer experience)

Planners in Asia Pacific are decided in their approach to managing cost reductions, most commonly targeting offsite evening events to reduce spend.

ASIA PACIFIC	
Number of nights	12%
Registration site	6%
Ground transportation	7%
Communication	5%
Offsite evening events	20%
Offsite optional activities	14%
Audio visual	3%
Food & beverage	9%
Onsite travel staff	9%
Room drops	6%
Use of Destination Management Company (DMC)	8%

American Express Meetings & Events Asia Pacific Survey, 2018

Preferred Area of Investment

(if overall meetings budget increased 10%)

When asked where they would invest additional funds, planners in Asia Pacific prioritize three areas relatively equivalently: onsite experience, increasing the number of days and increasing attendance.

ASIA PACIFIC	
Increase number of meetings	13%
Increase number of attendees at meetings	21%
Increase number of days for meetings	23%
Improve onsite experience	26%
Improve content delivery	6%
Increase use of technology	11%

American Express Meetings & Events Asia Pacific Survey, 2018

Overall Meeting Spend Within Organizations

2019 vs. 2018

Expectations for change on overall spend vary by country. Australia and Japan expect spend to decrease slightly in 2019, while planners in China and Hong Kong expect significant increases in meeting spend.

ASIA PACIFIC	AUSTRALIA	CHINA/ HONG KONG	JAPAN
0.86%	-0.31%	4.25%	-0.65%

American Express Meetings & Events Asia Pacific Survey, 2018

Primary Locations for Meetings

2019

Planners in Asia Pacific are similar to their colleagues in other regions, reporting a strong preference for meeting locations in large metropolitan destinations.

ASIA PACIFIC	
Large city locations	74%
Second-tier city locations	25%
Other	1%

American Express Meetings & Events Asia Pacific Survey, 2018

Group Hotel Rates

2019 vs. 2018

Average daily rates for hotels are expected to increase across Asia Pacific, with the most significant increase expected for the China/Hong Kong market.

ASIA PACIFIC	AUSTRALIA	CHINA/ HONG KONG	JAPAN
1.11%	0.50%	2.65%	0.43%

American Express Meetings & Events Asia Pacific Survey, 2018

Top 10 Asia Pacific Cities Based on Meetings & Events Activity

The list of top destinations for Asia Pacific meetings and events shows some changes over last year. New Delhi is a new addition to the list at number 8, causing last year's number 10 destination of Seoul, South Korea to fall off the list in 2018.

1. Singapore
2. Sydney, Australia
3. Bangkok, Thailand
4. Kuala Lumpur, Malaysia
5. Hong Kong
6. Shanghai, China
7. Melbourne, Australia
8. New Delhi, India
9. Tokyo, Japan
10. Mumbai, India

Cvent, 2018

CENTRAL AND SOUTH AMERICA

Meetings Activity by Type

Percentage of total meetings

Internal meetings, including training, is the largest category of meetings, particularly in Mexico.

	CENTRAL/S. AMERICA	MEXICO	BRAZIL
Internal Team Meeting/Training	26%	31%	22%
Product Launch (Internal/External)	13%	13%	13%
Conference/Tradeshow	12%	15%	10%
Senior Leadership Meeting/Board Meeting	19%	17%	21%
Client/Customer Advisory Board	14%	11%	16%
Incentive/Special Event	17%	14%	19%

American Express Meetings & Events Central/South American Survey, 2018

Meetings Activity Levels

2019 vs. 2018

Growth is driven by increased activity in Brazil, in all categories except internal meetings and product launches.

	CENTRAL/S. AMERICA	MEXICO	BRAZIL
Internal Team Meeting/Training	-0.09%	-0.32%	0.11%
Product Launch (Internal/External)	-0.05%	0.35%	-0.35%
Conference/Tradeshow	1.39%	-0.48%	3.95%
Senior Leadership Meeting/Board Meeting	0.69%	-0.58%	2.19%
Client/Customer Advisory Board	1.93%	0.06%	3.24%
Incentive/Special Event	1.77%	-0.09%	3.63%

American Express Meetings & Events Central/South American Survey, 2018

Number of Attendees

2019 vs. 2018

Meetings professionals in this region generally expect to have more attendees at their events. Only conferences and tradeshows in Mexico are expected to remain at the same attendance level.

	CENTRAL/S. AMERICA	MEXICO	BRAZIL
Internal Team Meeting/Training	0.89%	0.72%	1.18%
Product Launch (Internal/External)	1.37%	1.00%	2.04%
Conference/Tradeshow	1.52%	0.00%	3.55%
Senior Leadership Meeting/Board Meeting	1.43%	0.54%	2.62%
Client/Customer Advisory Board	2.25%	0.56%	3.24%
Incentive/Special Event	2.10%	1.00%	3.25%

American Express Meetings & Events Central/South American Survey, 2018

Days per Meeting

2019 vs. 2018

In Mexico, planners expect conferences, client advisory boards, and incentives to remain the same length, with other meetings lengthening. Planners in Brazil expect all meetings to be longer.

	CENTRAL/S. AMERICA	MEXICO	BRAZIL
Internal Team Meeting/Training	0.94%	0.74%	1.25%
Product Launch (Internal/External)	1.00%	1.31%	1.17%
Conference/Tradeshow	1.43%	0.19%	3.23%
Senior Leadership Meeting/Board Meeting	0.86%	0.50%	1.65%
Client/Customer Advisory Board	0.45%	-0.88%	1.80%
Incentive/Special Event	1.89%	0.33%	2.83%

American Express Meetings & Events Central/South American Survey, 2018

Cost per Attendee (excluding air cost)

2019

With a change in the survey question for 2018, there is a significant increase in reported cost per attendee. Updated estimates are consistent regarding the relatively higher spend for incentives and special events.

	CENTRAL/S. AMERICA	MEXICO	BRAZIL
Internal Team Meeting/Training	\$1,394	\$1,092	\$1,598
Product Launch (Internal/External)	\$1,942	\$1,767	\$2,022
Conference/Tradeshow	\$1,640	\$1,111	\$1,966
Senior Leadership Meeting/Board Meeting	\$1,817	\$1,486	\$2,010
Client/Customer Advisory Board	\$1,634	\$1,383	\$1,690
Incentive/Special Event	\$2,070	\$2,111	\$2,040

American Express Meetings & Events Central/South American Survey, 2018

Cost per Attendee

2019 vs. 2018

Cost per attendee is expected to be higher in 2019 with the single exception of customer advisory board meetings in Mexico.

	CENTRAL/S. AMERICA	MEXICO	BRAZIL
Internal Team Meeting/Training	1.65%	1.45%	1.96%
Product Launch (Internal/External)	1.78%	1.56%	2.13%
Conference/Tradeshow	1.30%	0.65%	2.32%
Senior Leadership Meeting/Board Meeting	0.55%	0.55%	0.88%
Client/Customer Advisory Board	1.30%	-0.29%	2.76%
Incentive/Special Event	1.89%	1.44%	1.96%

American Express Meetings & Events Central/South American Survey, 2018

Cost Area Cut First in Meeting Budget

(and still maintain customer experience)

If needed to address budget concerns, planners in Central and South America would cut offsite evening events and offsite optional activities first.

	CENTRAL/S. AMERICA
Number of nights	11%
Registration site	7%
Ground transportation	6%
Communication	7%
Offsite evening events	17%
Offsite optional activities	17%
Audio visual	7%
Food & beverage	7%
Onsite travel staff	6%
Room drops	4%
Use of Destination Management Company (DMC)	11%

American Express Meetings & Events Central/South American Survey, 2018

Preferred Area of Investment

(if overall meetings budget increased 10%)

If budgets increase by 10%, planners in Central and South America would invest in improving the onsite experience and increasing attendance.

	CENTRAL/S. AMERICA
Increase number of meetings	13%
Increase number of attendees at meetings	30%
Increase number of days for meetings	11%
Improve onsite experience	33%
Increase use of technology	13%

American Express Meetings & Events Central/South American Survey, 2018

Overall Meeting Spend Within Organizations

2019 vs. 2018

Planners in Mexico expect overall meeting spend to decrease somewhat, while those in Brazil expect an increase (although not enough to cover rising costs).

	CENTRAL/S. AMERICA	MEXICO	BRAZIL
	0.26%	-1.21%	1.38%

American Express Meetings & Events Central/South American Survey, 2018

Primary Locations for Meetings

2019

Planners in Central and South America prefer large city locations for their meetings.

	CENTRAL/S. AMERICA
Large city locations	80%
Second-tier city locations	20%
Other	0%

American Express Meetings & Events Central/South American Survey, 2018

Group Hotel Rates

2019 vs. 2018

Planners in Mexico expect an increase in group hotel rates in 2019. Those in Brazil expect a smaller increase.

	CENTRAL/S. AMERICA	MEXICO	BRAZIL
	0.96%	1.52%	0.86%

American Express Meetings & Events Central/South American Survey, 2018

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

Top destinations in Central and South America are Rio de Janeiro, Cancun and Riviera Maya, and Mexico City.

1. Rio de Janeiro, Brazil
2. Cancun/Riviera Maya, Mexico
3. Mexico City, Mexico
4. São Paulo, Brazil
5. Cartagena, Colombia
6. Panama City, Panama
7. Punta Cana, Dominican Republic
8. Buenos Aires, Argentina
9. Lima, Peru
10. Santo Domingo, Dominican Republic

American Express Meetings & Events Destination Analysis, August 2018

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MEETINGS & EVENTS

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