

2018 Meetings & Events Future Trends

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INCENTIVES
MAKE **MEETINGS & EVENTS** WORK FOR YOU
THE WORLD
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[WHY DO WE MEET?]

“There has to be return on investment. That needs to be the first point on the agenda from the very first conversation about the meeting or event.”

– CINDY FISHER, SENIOR VICE PRESIDENT AND GLOBAL HEAD
CWT MEETINGS & EVENTS (CWT M&E)



WELCOME



Welcome to the 2018 Meetings & Events Future Trends report. **It examines the global picture and regional differences**, as well as exploring industry trends before concluding with recommendations for your 2018 M&E program.

Of course, there are regional differences—destinations fall in and out of fashion, prices rise and fall in response to local stimuli. But **our projection is that overall conditions in the industry will remain stable as we enter 2018.**

This year's report goes beyond statistics to the root of what it means to hold a meeting or event. And it all starts with the simple question 'Why?', there always has to be a return on investment with value creation.

That is typically the best possible attendee experience at the right cost. Make attendees comfortable and interested. Appeal to their emotions and capture their interest. The more you do that, the more they'll engage and the easier it becomes to fulfill your objectives.

We all want to **organize and produce the best and most memorable event with the optimal value to spend.** Technology is helping organizers do that, transforming everything from planning and logistics, right through to the delivery of content at the event itself. And don't forget to use the data you gather to improve your next meeting or event.

Strategic Meetings Management is becoming more and more a strategic imperative.

It involves a disciplined approach to managing enterprise-wide meeting and event activities, processes, suppliers and data.

The results can be great. You can measure business objectives aligned with your strategic goals, as well as reduce costs, improve risk mitigation and enhance the attendee experience.

I trust you will find the report insightful, educational, and useful.

Cindy Fisher

Senior Vice President and Global Head
CWT Meetings & Events (CWT M&E)



[**GLOBAL FORECAST**]

- > Hotel prices will increase by an average 3.7%
- > Air fares will increase by an average 3.5%

[**REGIONAL FORECASTS**]

North America

- > Hotel prices will increase by 2.5%, as will air fares
- > Ground transportation costs will remain flat
- > Little room for negotiation on hotel prices because demand is outstripping supply
- > Intercontinental flights will see the biggest cost increases

Latin America

- > Nominal growth, if any, in hotel and air fare prices
- > Significant hotel construction in the Mexico/Caribbean region, driving M&E activity
- > Spend is switching from luxury hotels to enhanced food and beverage options
- > Lack of demand could see a reduction in air fares

Europe, Middle East and Africa

- > Air and hotel prices continue to rise
- > Wide regional variations because of economic and political uncertainties
- > Air fares will increase by the standard 5%
- > Unbundling of hotel costs provides a good basis for negotiating on price

Asia Pacific

- > Hotel and air prices will increase by 3.5% and 2.8% respectively, though there are localized differences
- > Demand for hotels is being met by expansion, particularly in China
- > Cost is a key consideration in the region and technology is being deployed to keep costs down
- > Security remains a key consideration in some markets



Global hotel prices will increase by **3.7%**



EXECUTIVE SUMMARY

[ENGAGING EVENTS]

- > Ensure your event is relevant for your attendees by starting with the question 'why?'
- > Make the logistics of entire event as simple as possible for attendees
- > Design the event to make it as engaging, interactive and comfortable as possible
- > Measure, measure and measure again, to make sure you're attendees have understood your messages

[VENUE TRENDS]

- > Choose venues that are interesting, relevant, on brand and on budget

[SAFETY AND SECURITY]

- > Both physical security and cybersecurity are paramount
- > Have safety and security on the agenda from the very first meeting

[TECHNOLOGY]

- > Technology solutions can improve the attendee experience and streamline your logistics
- > Ensure the tools you use enhance the conversation, not detract from it
- > Project management software smooths the planning process
- > And data analytics improves measurement so you can improve your next event

[RETURN ON INVESTMENT]

- > The value of the information your attendees absorb needs to be higher than the cost of the meeting or event
- > Strategic Meetings Management creates efficiencies and cost savings, while providing value for attendees

[RECOMMENDATIONS]

- > Focus on 'why'
- > Match your budget to the expected return
- > Engage your attendees from the very start
- > Use all the relevant technology to make the event interesting and efficient
- > Keep safety and security at the top of mind
- > Select venues that will inspire your attendees, while staying within budget



INDUSTRY SPOTLIGHT FROM OUR SPONSOR



As a trusted global partner of CWT, Wyndham Hotel Group is honored to sponsor the *CWT Meetings & Events Future Trends* report.

Corporate events organizers have a high-pressured job when it comes to booking meetings and conferences. They must choose the optimal location for their event, which will both inspire creativity and collaborative working, as well offer all the technical tools and right spaces to make a meeting as seamless and effective as possible.

Many of our hotels offer the perfect spaces for your meeting or event. In addition to breathtaking locales which truly inspire creativity and help you derive the best from your team. We can meet all their needs with conference and presentation rooms of all sizes, which are equipped with state of the art technology. Making Wyndham Hotel Group truly unique is Wyndham Rewards, our award-winning hotel loyalty program that works on a refreshing 'no tricks' basis and is the first of its kind. Through our 'Go Meet' program, we reward both event planners and meeting attendees with points which quickly add up and can be redeemed for free stays at more than 8,000 hotels worldwide.

Karine Pinson
Senior Director EMEA MICE
& Regional Sales Europe
Wyndham Hotel Group



[VENUE TRENDS]

Mediterranean cities, particularly within Spain and Portugal, or even the South of France, are quickly becoming some of the most popular destinations for corporate meetings and business events. Attendees are keen to get out of the boardroom and to explore all these locations have to offer, including Barcelona's famous Gaudi architecture and tapas bars, or Lisbon's historic Torre de Belem and colorful hillside neighborhoods.

Incorporating a hotel's surroundings is key to stimulating creativity and getting the utmost out of participants in corporate meetings. Wyndham Hotels and Resorts inspire discovery through shared experiences which incorporate each hotel's breathtaking surroundings.



GLOBAL FORECAST SUMMARY

The global meetings and event industry is principally affected by two costs: hotels and air fares.

[HOTELS]

Our global projection is that we'll see an increase of 3.7% in hotel prices in 2018.

There is a progressive push from suppliers to move corporate buyers away from fixed, negotiated hotel rates and toward **dynamic rate pricing**. While technology can accommodate dynamic rates, historically the rates have not proven advantageous for buyers. As the industry moves toward a 15-20% discount off published rates, a **blended program that offers both fixed and dynamic rates with maximum thresholds in low-volume markets may work for both suppliers and buyers**.

While hotel mega merger news has quieted down, the impact is expected to be first felt with the 2018 hotel sourcing season. Most buyers are likely to be working with one contact now for Marriott/Starwood to address all issues across the combined entity's properties and the same may soon be true for others. Speculation is also growing about how long mega hoteliers will operate with numerous brands to market and support rather than simply combining operations.



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“Smarter” hotels are on the rise with hotels investing in beacon technologies, messaging, in-room entertainment and more. Mobile apps are expected to be used more and more by tech-savvy guests to check in and out, unlock their hotel room door, operate the television remotely, control room temperature and more. And, while big data is available, hotels haven't determined how to personalize it. Forecasted rates are indicated in USD and might have different values when translated to local currencies.



GLOBAL FORECAST SUMMARY

[AIR FARES]

It's a similar story for air fares, with our global projection predicting an increase of 3.5% in prices.

The global airline industry's capacity is expected to grow around 7% in 2017 and 6% in 2018. Complicating airline pricing is segmentation of fares to broaden appeal as travelers are able to purchase from options including a basic economy restricted fare or various upgraded fares, with specific service options.

Airline prices are expected to rise along with oil prices in 2018. Oil prices have hovered below \$50 USD per barrel thus far in 2017 after bottoming out in early 2016 at \$29. How an airline is affected by fuel prices depends on its hedging contracts. Some carriers hedged and paid greater than market pricing in recent years, while others benefitted from little to no hedging.

SEGMENTATION OF FARES

On a macro level, segmentation is changing the broader definition of carriers, blurring the lines that once separated full-service, legacy, low-cost and ultra-low-cost options. While it may help carriers combat shrinking margins, it introduces new challenges for buyers in controlling costs.



Regional Forecasts



NORTH AMERICA

US hotel prices will continue to increase by around 2.5%, with air travel prices likely to increase by the same amount.

[HOTELS]

Hotel prices will increase in 2018 simply because **supply won't match demand**. And since the M&E industry still hasn't quite recovered to pre-recession levels, demand is only likely to increase, as will prices. On top of that, domestic leisure travel has been increasing, meaning some hotels and resorts won't even offer M&E capacity at peak times.

According to the World Travel and Tourism Council, leisure travel grew by 2.8% in 2016, dropping to 2.3% in 2017, in part because of the strong dollar putting off international travelers. Despite that reduction in growth, which is expected to continue in 2018, it is still growth and therefore competition for space.

In the luxury market, which is important for the incentive market, there will be 4% growth in supply in late 2017 to 2018, according to Allied Market Research. The result is that 85% of hotels will have average daily rate increases, with approximately half increasing by as much as 6% or more.



[HOW DO WE LOWER COSTS?]

"When seeking to negotiate prices down, focus efforts on what you can win—things like bundled extras and attrition"

— TONY WAGNER, VICE PRESIDENT AMERICAS
CWT MEETINGS & EVENTS



In the luxury market...

85% of hotels will have average daily rate increases

Some **hotels are finding new ways to make money by bundling various things**, including car parking and even the transportation of golf clubs. Even if you don't need either you may still pay, though there is generally room for negotiation.

There will be **little room for negotiation on price**. Multi-year deals provide some flexibility, if you're prepared to commit that far ahead. Internet access is another area of negotiation, as are the terms and conditions, particularly attrition rates.



NORTH AMERICA

[AIR FARES]

There will be **modest growth in air fares in North America**, with the biggest growth in intercontinental travel. The combination of increasing capacity and stiff competition, both domestically and internationally, will keep prices down. Low oil prices are also having something of an impact but market factors are much more important.

[DESTINATIONS]

As usual, some destinations remain popular for M&E, with others moving up or down the list. However, as long as demand outstrips supply, we're unlikely to see much change from 2017.

The key criteria to being a strong M&E destination is to **have good hotel inventory and good air links**. Wonderful accommodation won't cut it if it takes three days to get there and back, neither will great flight options if accommodation is inadequate. In the US, we expect to see a number of places in Arizona becoming more popular as new hotels come on stream.

There are other places around the world that are also becoming very popular with the US M&E market, including Croatia, Iceland, Malta, Montenegro, Portugal and Spain.

Hawaii always remains popular, particularly for companies based on the West Coast but can be pricey. Other perennials are always on the list, such as Washington DC and New York. However, there is a minor trend towards using venues outside New York City. California's wine country is unlikely to go out of fashion, even if it doesn't make the top ten.

[Top 10] cities for M&E in North America in 2017

COST PER ATTENDEE
PER DAY:



- | | |
|----------------------|-----------------------|
| 1. New York, USA | 6. San Francisco, USA |
| 2. Toronto, Canada | 7. Austin, USA |
| 3. Cupertino, USA | 8. Houston, USA |
| 4. Chicago, USA | 9. Orlando, USA |
| 5. Indianapolis, USA | 10. Las Vegas, USA |

SOURCE: BASED ON CWT BOOKING DATA, AVAILABLE VENUES, AND DEMAND TRENDS;
NORMALIZED FOR CLIENT OUTLIERS, AND SMITH TRAVEL RESEARCH

We expect both hotel and air fare costs to undergo nominal growth across the region in 2018, with some notable local variations.

[HOTELS]

We expect there to be an estimated 20% reduction in group sizes in Brazil due to the weakened economy, meaning clients will be looking to do more domestic events with less budget. Rio de Janeiro is set to host many events, buoyed by the new hotels and venues following last summer's Olympic Games. However, there are major security considerations which will slow the city's growth as an event destination. Reports of pickpocketing, thefts, and carjackings are sadly common.

STR, which provides global hotel data, has reported that **hotel construction in the Mexico/Caribbean region is up nearly 40% year on year**, with Mexico, and the Dominican Republic leading the way. We expect more M&E activity in cities such as Mexico City and Guadalajara in the coming year.



“ [WHAT'S HAPPENING IN LATIN AMERICA?]

"Prices are staying the same, or even dropping. There just isn't the demand for M&E in Latin America because of soft economies, security concerns and, in some places, over-supply of hotel capacity."

– GUSTAVO ELBAUM, DIRECTOR LATIN AMERICA
CWT MEETINGS & EVENTS

Large scale hotel developments and refurbishments in Colombia are making it a desirable destination for the US M&E market. For instance, Medellin's hotel accommodation is improving considerably, as are its convention centers. The coffee region is increasingly attractive because it's different and the costs are low.

Other lesser known destinations beginning to make their mark in the region include the exotic—but still accessible—Atacama Desert in Chile, as well as Iguazu Falls on the border between Argentina and Brazil.



LATIN AMERICA

[HOTELS]

A trend in the region—particularly Argentina—sees event organizers forfeiting luxury accommodation in exchange for better food and beverage options, enhanced Wi-Fi and more flexible services. This is driving demand in midscale hotels across the whole region.

We expect venue costs to increase by 3-5% in popular markets like Colombia and Mexico, while the overall figure for the region is for venue costs to increase by 2%.

[AIR FARES]

In Latin America and the Caribbean, there will be negligible increases and even price reductions in air fares, largely driven by a lack of demand.

[Top 10] cities for M&E in Latin America in 2017

COST PER ATTENDEE
PER DAY:  +1%

1. São Paulo, Brazil
2. Rio de Janeiro, Brazil
3. Mexico City, Mexico
4. Bogota, Colombia
5. Buenos Aires, Argentina

SOURCES: BASED ON CWT BOOKING DATA, AVAILABLE VENUES, AND DEMAND TRENDS;
NORMALIZED FOR CLIENT OUTLIERS, AND SMITH TRAVEL RESEARCH

**ONLY FIVE DESTINATIONS WERE SELECTED AS THERE IS A SIGNIFICANT
DROP OF VENUES / DESTINATION DEMAND AFTER BUENOS AIRES.



EUROPE, MIDDLE EAST AND AFRICA

The landscape is slightly different in this region. While air fares continue to rise, there are some shifts in buying patterns. And in the hotel sector, where prices are set to rise by approximately 4.5%, there is room for negotiation: supply vs demand is not as acute as it is in North America.

[UNCERTAINTY]

Costs are increasing a little while the economy across the region is flat, once you take inflation and currency fluctuations into account. In real terms meeting and events costs are going up incrementally. It's almost impossible to put a price on it across the country, or even by region, because there are so many variations.

That said, Brexit could mark a **major change for most of Europe**. To date, the only impact has been to attract people to the UK because of the reduction in the value of pound sterling. But it's too early to guess what the ultimate impact will be—we'll have a better idea by 2019 when the UK is scheduled to formally leave the EU.



"The political environment, safety and security considerations and the uncertain future of currencies in the region are having more of an impact than most travel trends."

– IAN CUMMINGS, VICE PRESIDENT EMEA
CWT MEETINGS & EVENTS

[WHAT IMPACTS TRAVEL?]





[Top 10] cities for M&E in Europe, Middle East and Africa in 2017

COST PER ATTENDEE PER DAY:



+4%

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

SOURCES: CVENT DATA AND SMITH TRAVEL RESEARCH

EUROPE, MIDDLE EAST AND AFRICA

[AIR PRICES]

Air fares in the region continue to grow by around 5%, which may look steep but it's a standard increase following the pattern of previous years. However, there is a shift towards an open policy as opposed to group block booking. This trend goes back to the attendee experience: an open policy is typically better for travelers because it is more flexible and therefore gives them more choice.

But it is typically 20% more expensive to book flights in this way, even when a price cap is in place. In some instances, companies don't even mandate this.

There is a slightly different picture in the Middle East, where the security situation continues to have a negative impact on demand for travel, and therefore on prices.

[HOTELS]

The hotel market doesn't have the same pressure on supply as the Americas; it isn't much of a seller's market. And hotels are unbundling costs. **There is a move away from agreed-rate programs to rate caps.** In the same breath, there is a move away from day-delegate rates to rates based on rooms, food and beverage, AV and so on.

This provides a **good basis for negotiation**: there are more angles open to discussion. And because there isn't quite the same pressure on inventory, you can typically get better deals the closer you are to the meeting or event date.



[DESTINATIONS]

It's **impossible to ignore the impact of safety and security when it comes to venue selection in the region**, with many countries now being higher risk. There are others that are less obvious but are still not on any list; Turkey is a good example. Terrorist attacks in Brussels, London, Manchester, Paris and Barcelona all have an impact as well, even if in the short-term.

Against that background, Italy and Spain are becoming more popular, as is Portugal, with its reasonable pricing. Germany and the UK remain as popular as ever. Specific cities are also attracting more interest, such as Berlin, Düsseldorf, Cologne and Vienna.

There are also new destinations emerging particularly for the incentive market, led by Bordeaux, Toulouse, Palma de Mallorca. They are developing new infrastructure and have either existing or new travel connections, and

CHOOSING YOUR DESTINATION

Choosing your destination has to depend on the reason for the meeting or event and its size. Whatever the meeting, there are some standard considerations:

- > There must be **minimal security risk**
- > The cost needs to be **within the budget**.
- > Flights need to be as **simple as possible**.
- > **Venue availability** is essential.

Tourist authorities often provide incentives to encourage companies to run meetings in their area. For instance, in Ireland there are some value added tax (VAT) reclaims available and some local companies provide services for free for on-site inspections. There are plenty of other examples around the world: tourist boards, convention bureau and regional governments are often very keen to help.



Prices aren't changing very much in Asia Pacific, for either hotels or air fares, with increases of 3.5% and 2.8% respectively.

[HOTELS]

The impact is that **hotels largely remain the venues of choice** across most of the region, particularly in China where new hotels, with more sophisticated facilities, open every week. Australia and New Zealand are outliers in the region in this respect: they haven't seen much hotel development recently so there is more demand for unique venues.

Despite ever-increasing hotel stock in China, prices are set to continue to increase because of demand from both business and leisure travel. The increase will be in the range of 5%.

[TECHNOLOGY ADOPTION]

Since cost is an important driver, we're seeing an **increase in the use of digital platforms for virtual meetings**. In China, WeChat is being used for meeting interaction more and more, showing the importance of using every available tool to enhance the attendee experience; it isn't just about Twitter and Facebook.

There has also been an **increase in the deployment of Strategic Meetings Management programs** in the region. However, there is relatively slow adoption of electronic RFPs, compared to other regions, because most of the platforms are in English, presenting a barrier for many hotels and venues, though not for international chains.

[SECURITY]

Security is also limiting people's desire to travel. Indonesia, Malaysia, the Philippines and Thailand all have some geopolitical challenges.

Despite the threats, Thailand's government is working hard to encourage people to continue coming, and the increasing number of visitors shows the impact local authorities can have.



[Top 10] cities for M&E in Asia Pacific in 2017

COST PER ATTENDEE PER DAY:

 **+5%**

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

SOURCES: CVENT DATA AND SMITH TRAVEL RESEARCH

[LOCALIZED DIFFERENCES]

There is also a drop-off in incentive travel in the region, driven by both cost and security concerns, but people are coming from other parts of the world. Recently, a party of 2,200 people from Europe went to Shanghai on an incentive trip and there are plenty of other similar examples.

China is a market on its own:

- > China's hotels are both innovative and hungry for business, and there are lots of players and lots of chains.
- > The Chinese government only uses local hotels, pushing prices down further.
- > Combined with a relative absence of security concerns, China is a good location for M&E.

The best venues:

- > Singapore has an abundance in relevant space and excellent air links.
- > South Korea is an emerging destination, boosted by the fact Pyeongchang will be hosting the 2018 Winter Olympics.
- > Taiwan is also on the way up, with new hotels opening, though it is harder for Chinese citizens, who need a special permit to travel there, which will keep prices down.
- > Johor Bahru and Macau, close to Singapore and Hong Kong respectively, are both developing new hotel stock and links.



[WHAT ABOUT INNOVATION?]

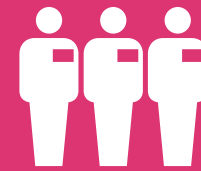
"Cost is a key consideration in APAC for the M&E industry. But that doesn't mean there isn't room for some innovation, particularly when it comes to using technology, as well as structuring the event and how you use data."

—LUTHER LOW, REGIONAL DIRECTOR, ASIA PACIFIC
CWT MEETINGS & EVENTS



Japan is also a separate market:

- > Tokyo has higher costs than other areas, even though it has great connections.
- > Kyoto, Okinawa and Osaka are growing in popularity, particularly for people from Asia Pacific because there are direct flights.
- > Hosting a major event can have a significant impact on a location. **Despite being a few years out from the 2020 Summer Olympic Games, the event is already affecting the local market.**
- > However, hotel prices will only experience modest growth in 2018 because prices are already high and because of increasing stock.
- > There is traction in the market with Japanese companies initiating both the desire and implementation of strategic meetings management programs.



Engaging Events

ENGAGING EVENTS

Any meeting or event, whether it's with your closest team or your biggest clients is about encouraging attendees to think or act differently. Attendees might walk away from an event with a strong call to action in mind or they might walk away more informed about a certain topic. Either way, they should walk away with a new set of emotions that changes the way they think and act. That **change is therefore the basis for measuring the value of the meeting or event.** It's the answer to the vital 'why?' question.

Event planners need to take many things into account, in particular the philosophy of respecting the attendee by organizing appealing events. This is the concept of making the whole event process as easy and interesting as you can for your attendees, navigating various social complexities. Increasingly, it means **capturing the attention of Millennials—the digital generation: by 2020, they will make up 40% of the workforce.**



[IS IT INTERESTING?]

"Holding an audience's attention is hard in a world of constant distraction. Just for starters, the event needs to be more interesting than their social media feeds."

— JACK MARFLEET, HEAD OF EVENTS UK & IRELAND
CWT MEETINGS & EVENTS



An engaging event leads to more attentive attendees. And with an audience that is ready to listen, you have a much better chance of having your messages received, understood, and ideally repeated outside the event. **In particular, organizers should consider more precise planning of the agenda and space, a better understanding of the culture and wellness needs of the attendees, and additional customization.** It might require a more diligent approach but it's also much more effective.

ENGAGING EVENTS

[PRE-EVENT]

It takes time and effort to come to any meeting or event so people want to be captivated from the very start. And that process now starts way before attendees arrive.



Registration is the start-point:

- > **Start sharing engaging content**, such as social media handles, the event app, and visual collateral.
- > **Start collecting views and opinions**, providing the benchmark for the effectiveness of the whole project. You have to know what people initially think to determine if their takeaways from the event are what you want them to be.
- > **Take the stress out of event logistics for attendees**, with links to booking sites populated with a selection of appropriate flights and a simple "Click here to book your flight."
- > **Picking up name badges is also being digitized**: a few taps on a tablet at the entrance now suffices. It's about making the event as easy as possible for them.

The aim is to have attendees who arrive at the meeting or event with the **right mindset to discuss the subject at hand**, and knowing they will be able to focus on the content without worrying about logistics.

Engagement:

- > **It's about catering for your audience**. Most people now have a smart phone. Then there are tablets and laptops. Use the proliferation of devices to your advantage.
- > Tell people the **event hashtag and encourage them to interact on social media**.
- > **Venue Wi-Fi** should be capable of handling the fleet of attendee devices. Wi-Fi is something organizers should think about from the outset so they can negotiate it into the contract. This applies as much to meetings as it does to events and conferences.
- > There should also be a ready supply of **power sockets**, ideally for each seat.

ENGAGING EVENTS

[DURING THE EVENT]

There is a **change to how agendas are being designed**. A break is no longer just about going to the bathroom and having a coffee. People want time to catch up on emails and maybe get a little fresh air. It's about wellness as well as allowing people time to do other work. Refreshed, relaxed people are more receptive.

The same goes for **well-fed people**. There is actually a move away from providing snacks at every break, which has been the standard for years. It's now quality over quantity—locally-sourced, locally-inspired, healthier options. The same applies to drinks. Authentic, local flavors can differentiate an event from the corporate norm.



Top Tips

- > Encourage social media interaction
- > Use real-time polling
- > Provide prizes for most active attendees

Presentations need to be memorable and interactivity is a great way of encouraging that. Everyone has a phone so you can actively encourage people to ask questions, using social media or the event app, during the presentation rather than at the end, and you can use them for polling. Gamification is spicing up M&E. It can be a challenge for the speaker and organizer who both need to prepare highly relevant content and be able to adapt on the go but it can make events more memorable and therefore more effective.

[**DURING THE EVENT**]

We're also seeing a shift away from traditional theatre-style seating arrangements, or round table in a meeting room. You can have sessions on sofas, standing meetings and even walking meetings. **There are no rules anymore.**

The same applies to venues. There has always been a drive for new, unique venues. Taking attendees to unexpected places, where they might not otherwise be able to go, is proving very successful. Raw buildings—empty spaces that can be dressed specifically for the meeting or event—are becoming popular.

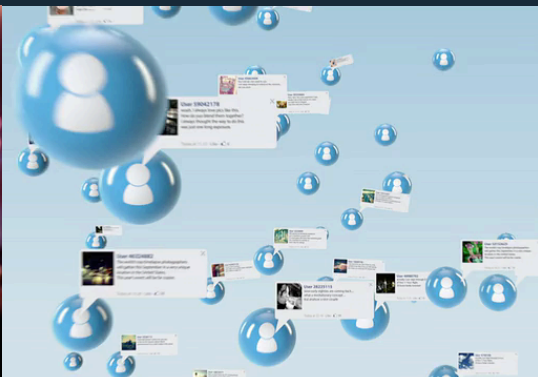
But it is not something to be treated lightly because it can add significantly to the planning time required and the cost. That is the balance required throughout the entire discussion about the attendee experience. **How can you improve the effectiveness of the project, while maximizing the return on investment?**



[**WHAT ABOUT FEEDBACK?**]

"Imagine getting live feedback from the audience on your presentation. You could even prepare different versions of your presentation and give the audience some options in a live poll. Suddenly you have a totally engaged crowd who can choose exactly what they want to hear."

– PAUL STODDART, MANAGING DIRECTOR, UK, IRELAND & BENELUX
CWT MEETINGS & EVENTS



[**ATTENDEE EXPERIENCE**] + [**SOCIAL INTERACTION**] = [**INTELLIGENT DATA**]

[**AFTER THE EVENT**]

The very best way to measure success is by **tracking your attendees' behavior and mindset after the event**. Depending on the call to action and aims of your event, that measurement could take place across a very long timescale. It could be through perception surveys, social media behavior or simply sales.

Second best is to **ask their opinion**, during the event of course, and also afterwards. Proper feedback will help you understand the success of the meeting or event. It will also help planning for the next one.

You can also **remain in touch** with people through social media, which applies particularly to your key influencers. In fact, one of your metrics could be to initiate such relationships, which can be as useful in influencing long-term behavior.



TOP FIVE WAYS TO CREATE AN ENGAGING EVENT



1

Include interaction in every single part of the event, from registration to the wrap-up email and follow-up



2

Make sure the agenda includes time to network and check emails, and build in time for breaks



3

Provide healthy, culturally-relevant food and beverages



4

Be smart about how you use technology to personalize the event

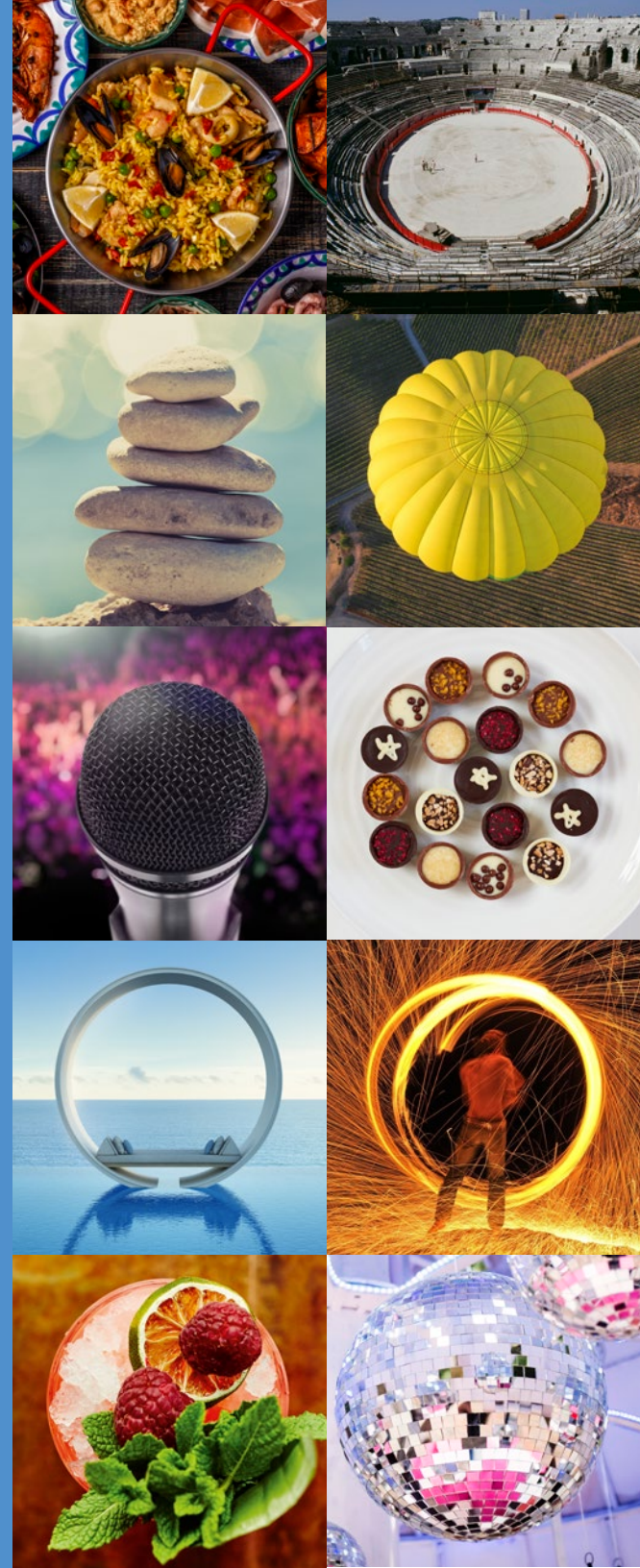


5

Measure, measure and measure again, to be certain your message is getting through



Venue Trends



VENUE TRENDS

There has always been demand for interesting venues. Interesting means impactful; impactful means memorable; memorable means messages are absorbed; absorbed messages means behavioral change. That hasn't changed. What has changed is that people increasingly want **experiential events**. Even the most traditional companies are incorporating unique venues into their events.

Think of castles, museums, art galleries. One of the most innovative car manufacturers is now offering a space to rent in their campus—fully-equipped for an event.

The benefits are obvious. But there are also challenges. Many of these venues aren't used to dealing with the intricacies of running events. A good option is to use a hotel for the event and somewhere unique for dinner—you might even be able to use the hotel's food and beverage team.



This trend is also spreading to Strategic Meetings Management (SMM). In the past, companies have been happy to use any venue for their SMM program, as long as it is within budget and in the right location. Budget remains a major consideration, of course, but we're seeing a move towards companies **choosing venues that reflect their brand**. Or, at the very least, venues that cater to their individual branding requirements. **Event production is now a key consideration**; it's important that a venue can adapt to a company's unique meeting themes.



[**TEN GREAT VENUES**]



1 Gardens By the Bay, Singapore – Asia's most exciting city garden, with incredible views over the ocean



2 Solent's Fort, Portsmouth, UK – A 19th century fort, sitting right in the middle of one of the world's busiest shipping lanes



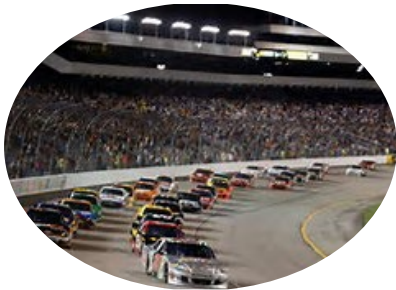
3 Skyway, Mont Blanc, Italy – The top of one of the highest mountains in Europe, with a stunning cable car ride



4 Exploratorium, San Francisco, USA – A public laboratory overlooking the most iconic bay in North America



5 Boat on the river Nile, Egypt – An adventurous trip down the world's longest river



6 Richmond Raceway, Virginia, USA – Throw a fast-paced event at this famous racetrack



7 Grotta Palazzese, Polignano a Mare, Italy – Caves carved out of limestone, overlooking the sea



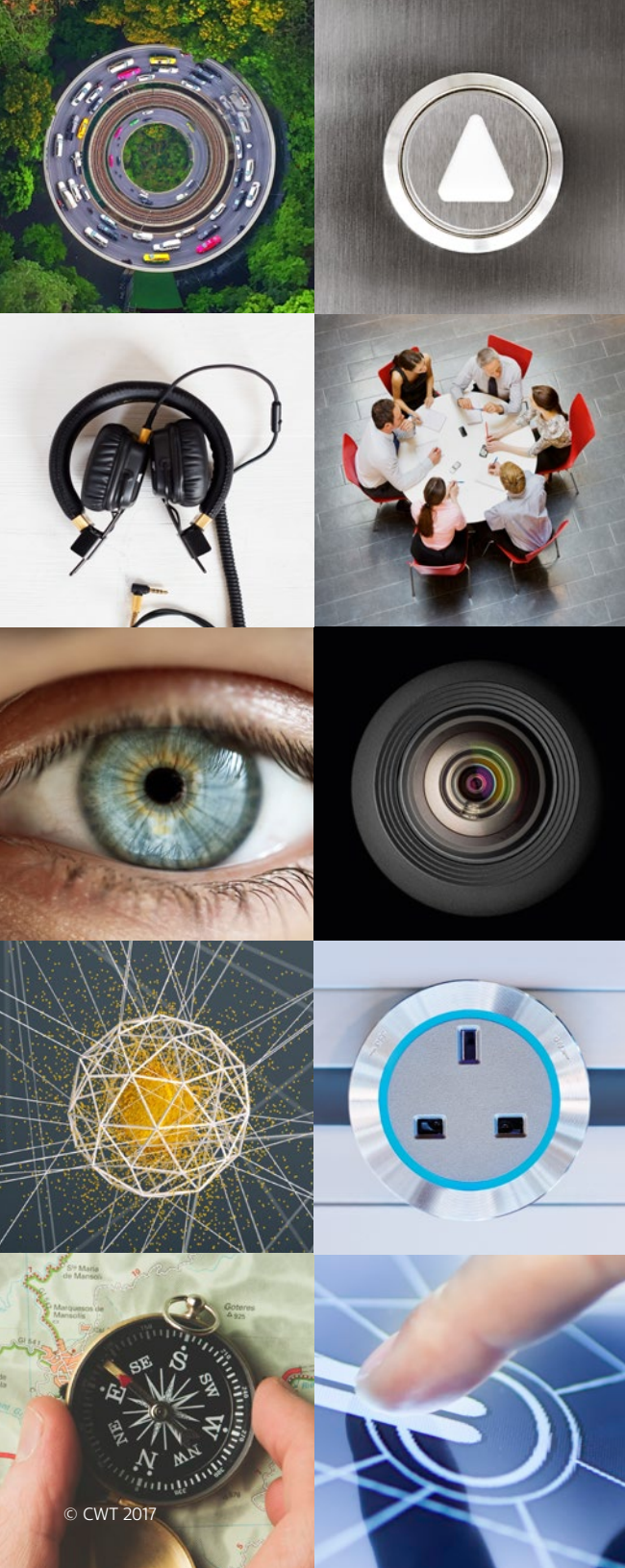
8 The Printworks, London, UK – A blank industrial space, a former newspaper print works, in the center of one of Europe's major cities



9 Capo Spartivento, Sardinia, Italy – An ancient lighthouse, which has guided mariners for generations



10 Shanghai Tower, Shanghai, China – The top of the tower: you can see for miles and miles



Safety & Security



SAFETY AND SECURITY

There is nothing to balance when it comes to safety and security. Security should be high on the planning agenda. **You have a duty of care to protect your attendees throughout the duration of the event.** Indeed, it's likely that in some jurisdictions, your legal duty of care requirements will increase.

[PHYSICAL SECURITY]

A good starting point is to **choose a location where people feel comfortable.** This is true for every type of meeting or event but it's particularly true of incentive events. Unsurprisingly, people aren't as motivated if they think they'll be uncomfortable in the reward location.

There are some places you wouldn't consider for any type of travel, but we've also seen incidents in major event locations in recent months. Those incidents have had an impact in the immediate aftermath but the downturn doesn't last long.

In the current climate, **visible security**—in the form of security guards or ID checks—can actually add to the attendee experience, if only as reassurance that safety has been taken seriously.

At a lot of events today, security is like domestic flights in the US 20 years ago, when you could just walk up to the gate without going through any form of check. That's changing. Security is now included as a significant part of the planning process and there's been an industry-wide tightening of procedures.



"Don't jeopardize people's safety. There really is no excuse. And plan your security so it doesn't inconvenience attendees."

[WHAT ABOUT SAFETY?]

— BEAU BALLIN, SENIOR DIRECTOR, BUSINESS DEVELOPMENT
CWT MEETINGS & EVENTS





SAFETY AND SECURITY

[CYBERSECURITY]

There is a similar compromise to strike with cybersecurity. **Ideally you want to provide Wi-Fi that's easy to access but cybersecurity is about limiting access and/or protecting it.** It is an increasing concern at corporate events but it needs to be balanced with the fact that technology is such a great enabler. While there isn't a huge appetite to reduce technology's impact, event agencies are helping mitigate the potential risks without being too intrusive.

Cybersecurity measures include physical security, close monitoring and even corporate security. An incident at the head office can compromise an event as much as any local attack—a malware infestation or attendee data leak, for example. You can also change the Wi-Fi password every day, notifying attendees through the event app.

Global spending on cybersecurity products and services will exceed **\$1 trillion** cumulatively over the next five years.

SOURCE: [CYBERSECURITY VENTURES](#)



Technology





TECHNOLOGY

Technology is helping organizers produce better M&E. The point of bringing people together is so they can talk to each other. **The technology you use should therefore make conversations easier.** It should be user-friendly and focus on the attendee experience. Attendees will see some of it but there's also some great new technology behind the scenes.

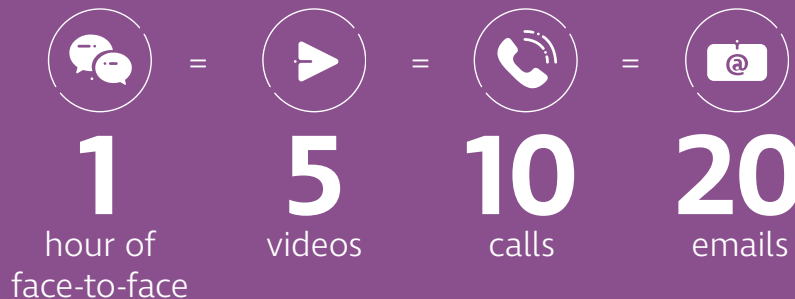
[WHAT ATTENDEES SEE]

Once they arrive at the venue, the very first thing people encounter is the **registration process**. And it's increasingly being digitized. You can now use tablets on which people enter their details and collect their badges, though of course you still need a few people to help.

People often use their last experience as the minimum level of expectation for their next experience. So if your attendees have checked in for their flight to the conference using a kiosk, they're going to expect a similar standard at the event.

This concept extends to **personalization**. We're all used to targeted offers and it's now possible to create that sense of personalization at events. By capturing relevant data about each attendee before the event, organizers can ensure that they receive information tailored to their needs.

Need to meet:



[WHAT ATTENDEES SEE]

Meeting apps, which attendees access through their own devices, are evolving to include interaction, ranging from sharing thoughts and images, to gamification and live polling. You can also use an event app to track opinion in real-time, to see how it changes from the beginning of the process to the end. You can also use apps to send people context-aware information depending on their location at an event, using radio frequency identification (RFID) or beacon technology.



Social media is now ubiquitous—it's on event screens, on attendees' devices, and on event apps. The opportunities for engagement cannot be ignored. Conversations can be encouraged via event hashtags, live-tweeting event speakers, competitions and through the sharing of content. Content can be optimized for social sharing, a phenomenon which makes the sphere of influence significantly wider than the event itself. It should be appealing, emotional, and insightful. Visual content proves particularly effective in engaging today's interactive attendees.

**EVENT APPS:
TOP FIVE NEW ADVANCES**

Event apps are constantly evolving and improving. Here are our top five favorites for 2018:

- 1 ARTIFICIAL INTELLIGENCE**
Getting insights about attendees' social media interaction and habits
- 2 VIRTUAL REALITY**
Providing a much more immersive experience
- 3 CHATBOTS AND CONCIERGE**
Delivering information quickly and efficiently
- 4 MATCHMAKING**
Drawing data from multiple sources and to create a detailed picture of each attendee
- 5 SOCIAL EXTENSION**
Capturing qualitative data about the event and providing a forum to speak about the event



TECHNOLOGY

[WHAT'S COMING]

Virtual reality is coming to events. At its basic level, it's a good way of showing products that are hard to bring to an event. But virtual reality is becoming more sophisticated, incorporating interaction with other users. It could become a tool for virtual meetings, with each attendee linked, sharing each other's content.

The concept of remote speakers is also gaining traction, again because it keeps costs down. It can also make the difference between a speaker being able to attend or not. Committing an hour to give a remote presentation is a very different prospect to committing a day to get there and back.

For example, in the recent French presidential election, holograms were used to beam candidates to rallies around the country, ostensibly to cut travel times. However, the costs of using holograms remain significant and the technology isn't always available.

There is another reason holograms have yet to catch on. **No amount of technology can replace meeting face-to-face.** The technology to replace networking has not yet been invented; it just doesn't pass the test of making conversations easier. It's still easier to read emotions and judge reactions in person, making for more productive conversations. So, meet face-to-face if you can, otherwise this sort of technology is a viable alternative.

WHAT IS REALITY?

Organizers will soon be able to use data about their audience and fuse it with technologies such as Virtual Reality, Augmented Reality and Mixed Reality to engage delegates with a truly tailored message that connects with them on an emotional level. This is being driven by attendees wanting to engage with content rather than simply view it, giving you the chance to immerse your audiences in your story.

Mixed Reality technologies, like Intel's Project Alloy from Intel and HoloLens from Microsoft, are finding their position in events as more content is produced. MR will allow audiences to experience a mix of real world and digital assets, and to interact with both at once.

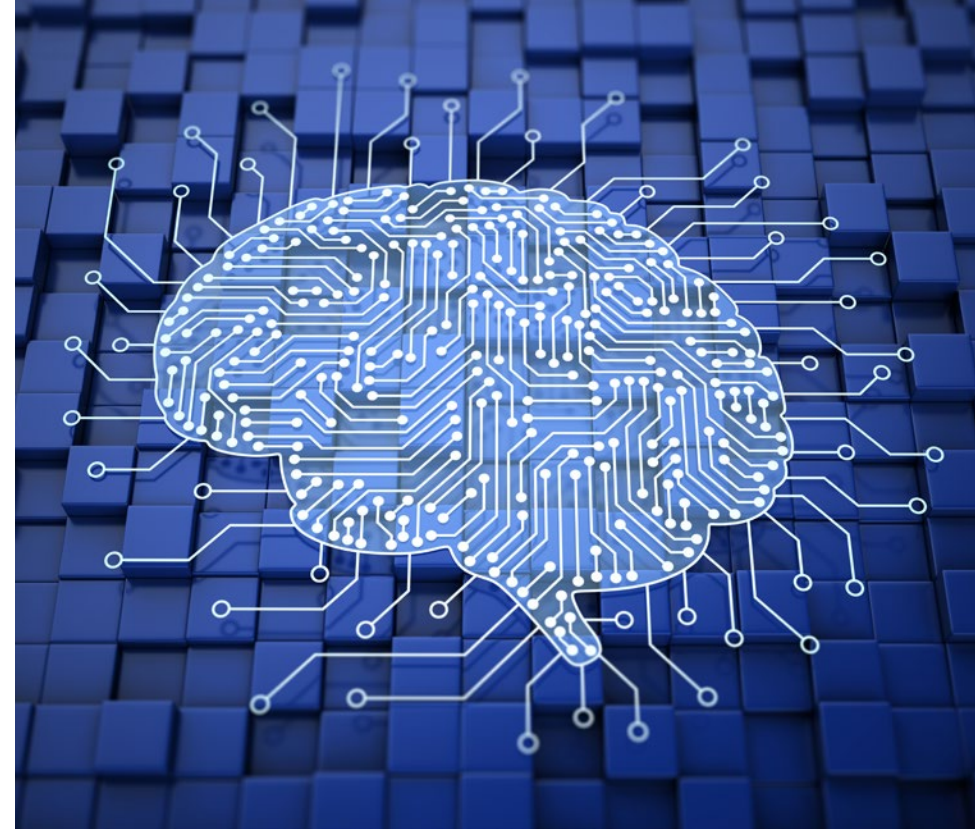
SOURCE: SPINNING CLOCK

[WHAT ATTENDEES DON'T SEE]

It starts with **project management software**. Spreadsheets are being replaced by online tracking tools that cover everything to do with a project—every single cost, timelines, suppliers, time spent, task management and so on. They **provide visibility to everyone involved, streamlining the planning process**.

Meeting management tools help you at each stage of your event, from venue sourcing to budgeting, marketing, registration, attendee management and post-event analytics. They typically start with a self-service portal where speakers and exhibitors can see tasks and their due dates, and receive automated prompts. They also have room booking management tools, mobile-optimized versions, and web-based registration tools.

Another streamlining tool that is becoming more popular is **electronic RFPs**. They are now generally used by planners for all requests. Over the past year, there has been a big improvement in the number of suppliers responding electronically, probably because it is a more efficient process and reduces costs for everyone. The basis has to be for the client and agency to have an agreed approvals process for all spend.



[IS TECHNOLOGY WORTH IT?]

“Technology is your friend. Be open to using the latest and greatest tools. But make sure you ask the essential question about return: is it worth it?”

– TESS TORRENO, REGIONAL OPERATIONS MANAGER, ASIA PACIFIC
CWT MEETINGS & EVENTS



TECHNOLOGY

[DATA ANALYTICS]

Data analytics is one of the fastest growing trends. It involves the collection, collation and analysis of data generated before, during, and after an event. It is now possible to gather a huge amount of data about each attendee, from their usage of the tools you provide, social media habits and so on, so you can track their behavior.

Data can be collected from a wide variety of sources and is a process that is only possible when you use software tools to automate the project management and capture information from every attendee. That includes their travel preferences, what kind of room they prefer and, most importantly, what content interests them the most.

It is essential to collect data in a systematic way for every meeting and event because while data from each event is useful, it becomes exponentially more important when it is collated and analyzed alongside data from a number of events. **The greater the pool of data, the more interesting and useful the conclusions that can be drawn from it.**

Data is to this century what oil was to the last one: a driver of growth and change.

SOURCE: [THE ECONOMIST](#)



Return on Investment

RETURN ON INVESTMENT

An event's most important measurement of success is whether there is a positive return on investment.

We've talked about the importance of the attendee experience, the vital issues of safety and security, and the role technology can play to make an event both more engaging and more efficient. These three should be at the top of the planning agenda, given how much they impact the ultimate success of any meeting or event.

Return on investment in this context equals the value of the information your attendees have absorbed minus the cost. It entails measuring the former and tracking the latter.

A recent trend is that procurement teams are increasingly becoming involved in event management, which is driving a greater discipline in cost tracking and management. **Strategic meetings management is an important service to control costs and prove value.**



[WHAT ABOUT ROI?]

"Nothing beats return on investment. Get that right from the start you'll have a successful event. Lose focus on it and you'll never know how successful you've been."

– STEPHEN SORENSON, SOURCING SUPERVISOR
CWT MEETINGS & EVENTS

When it comes to measuring return on investment, **opinion tracking is very useful.** If you ask people their opinions before, during and after the event you can see how they have changed—or not. You can also use social media to track what people are talking about and how their opinions have shifted. **The final measure is whether people do indeed carry out the actions they say they will** (or won't). Putting all that together means you can truly know the value of your meeting or event.



STRATEGIC MEETINGS MANAGEMENT

A well-run strategic meetings management (SMM) program delivers high quality meetings, visibility and control of spend, and most importantly, happy attendees.

An SMM program is the enterprise-wide management of meetings. It includes strategy, operation and data analysis, always with the overarching goal of creating substantial efficiencies and savings while bringing value.

At the heart of an SMM program is data and its usage comes in five stages:

- > Evaluating your current data capture systems and providing customized data analytics
- > A gap analysis between where you are now and where you want to be
- > Delivering a comprehensive business intelligence strategy
- > Developing scorecards that engage key stakeholders
- > Designing analytics and customized scorecards across multiple audiences





Recommendations



RECOMMENDATIONS

[FOCUS ON WHY]

M&E planning should **start with asking 'Why?'** Indeed, it should permeate everything you do. Set clear objectives from the start and use them to define your budget.

Put a major emphasis on **attendee engagement**, making sure you use the right technologies to wow people without getting in the way of encouraging and facilitating conversations. And use the right technologies for project management, to ensure smooth logistics and to keep track of every aspect of spending.

[EVENT INTERACTION CHECKLIST]

[PRE-EVENT]

- ✓ Provide relevant content to warm up your attendees
- ✓ Make booking and travel as simple as possible
- ✓ Make sure Wi-Fi and power sockets are available

[DURING EVENT]

- ✓ Build an agenda with useful and relaxing breaks including healthy, local food
- ✓ Encourage interaction throughout the event
- ✓ Use all the technology tools at your disposal to make the event interesting, relevant and engaging

[POST EVENT]

- ✓ Track behavioral changes
- ✓ Get comprehensive feedback from attendees
- ✓ Continue social media interaction with your attendees



RECOMMENDATIONS



[BUDGET]

The temptation, when setting a budget, is to think of the kind of meeting or event you want then working out how much it will cost. Resist that temptation because it's the wrong way round. Instead, **start with the value the meeting or event can generate**. That value determines how much you can spend on the event before the investment outweighs the returns.

Be realistic. While costs aren't dramatically increasing, even in the North America hotel market, they certainly aren't coming down. Don't assume you can get more bang for your buck because generally speaking, across the world, the reverse is currently true.

You might not be able to negotiate on price but you will be able to **negotiate on terms and conditions** so make sure you do.

There are two fundamental things you can do that always help. First, **be prepared**. Make sure your budgets contain as much detail as possible from the very start. Since hotels hold the stronger hand in most of the world at the moment, you don't want to jeopardize any advantage you might have.

Second, **be open to long-term deals** with hotel chains and venues, both for multi-year contracts in a single location and for meetings in multiple locations.

This is your single best way of reducing the cost.



[ATTENDEE EXPERIENCE]

We've talked a lot about this because it is paramount.

The key takeaway is to **make the whole process—from end to end—as simple as possible**. The simpler it is, the more people will appreciate it and remember it. And that means they'll be more likely to act on your call to actions.

You also need to **track attendees' actions and opinions**; it's the opposite side of the equation to your budget.



[TECHNOLOGY]

Whenever you discuss technology, **ask yourself if it facilitates the conversation** or if gets in the way. To put that another way, is it a gimmick? If it is, or if it's too expensive, don't use it.

You have to make sure there is **reliable Wi-Fi** at the venue. Insufficient Wi-Fi is certainly one of the things attendees find the most annoying and inhibits the use of so much technology.

Use the most appropriate tools to **consolidate all your planning and budgeting**, providing visibility throughout the entire project. We've talked about project planning but small meetings, say up to 100 people, can also take up a lot of time in the planning. There are plenty of online platforms for small meetings which create huge efficiencies and cut costs, so make sure you use one of them.



RECOMMENDATIONS

[SAFETY AND SECURITY]

The first principle is to understand your risk profile. A major event with high profile speakers will always attract more attention than that internal meeting about time sheets. **Plan your security in line with the amount of risk in each situation.**

But do make sure you have a plan in place, particularly for pulling a meeting or event. What will you do if there is an attack six months before your event? Or a month or a week before? Build that thinking into your contract with **cancellation and attrition clauses**, so you can cancel at the last minute if necessary.

But above all, **use common sense**. While of course you wouldn't go to a war zone, a single isolated attack probably isn't reason enough to cancel an event.

There are some simple measures you can put in place. **Ask for ID when people arrive**; around 90% of business events don't. It might not sound like much but any barrier is enough to put criminals off and it could make all the difference.

Monitor phone charging stations. Since smart phones typically use the same port for charging and downloading content, it's very easy to install hidden devices behind power sockets that can skim information. It's also easy to prevent by keeping an eye on those sockets.



[DESTINATIONS AND VENUES]

Take people to places that are great, inspiring and memorable—as long as they fit within the budget. Don't get carried away. And make sure there are no safety or security risks: your home government, the venue's government and your M&E agency can give you relevant and up to date information.

Make sure you know what help the local authorities are prepared to give. A VAT waiver, for example, can make a huge difference to the overall cost of your event.



ABOUT CWT MEETINGS & EVENTS

CWT Meeting & Events delivers 35,000 innovative, high-quality projects for customers every year—across all industry sectors, globally. Our creative know-how helps us deliver awe-inspiring events, and our logistics expertise guarantees professional meeting services, group travel, and compliance. We manage your strategic meetings management programs with one aim in mind—to maximize your return on investment.

CWT Meetings & Events is Carlson Wagonlit Travel's M&E division.

For more information:

There's more information about CWT Meetings & Events at www.cwt-meetings-events.com.

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[METHODOLOGY]

The information and findings in the 2018 CWT Meetings & Events Future Trends report are based on:

- ✓ The market-specific expertise and travel industry knowledge of CWT M&E personnel worldwide and spend data from the CWT global client portfolio.
- ✓ The joint GBTA/CWT Travel Price Forecast

Thank you to all our partners and clients who provided invaluable information in creating this report.

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Meetings&Events

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INCENTIVES
MAKE **MEETINGS & EVENTS** WORK FOR YOU
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SOURCING