



MEETINGS & EVENTS

2023 Global Meetings and Events Forecast





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2023 Interview Panel and Contributors

Paul Cavanaugh, Altitude
Sue Cavanaugh, Altitude
Ciaran Delaney, hubli
Amy Garrick, TEAM LEWIS
Chuck Ghoorah, Cvent
Jonathan Kaplan, InterContinental Hotels Group
Robert LeBel, Delta Air Lines
Carolyn Pearson, Maiden Voyage

American Express Meetings & Events

Emma Bason
Amanda Chamov
Daisy Crane
Tina Di Biasio
Nicola Fionda
Tonya Hempstead
Noelia Herranz
Hervé Mattan
Linda McNairy
Roberto Ortiz
Ariana Reed
Milton Rivera
Patrick Rush
Harald Spohr
Gerardo Tejado
Eloísa Urrutia

Optimism and Growth

Dear Readers,

Welcome to the 12th annual Global Meetings and Events Forecast. As we look to 2023, it's an exciting time to be in this industry. In-person meetings and events are roaring back – and at the same time, we can take lessons learned during the last few years to make positive, long-lasting changes to the way we work. Dramatic improvements in technology and a renewed focus on sustainability, wellness, and inclusivity provide a clear path forward for the industry.

Our survey respondents are “very optimistic” about the future: two-thirds expect that the number of in-person events will return to pre-pandemic levels within one to two years. In North America, where respondents reported the highest percentage of completely remote workforces, internal and small and simple meetings have already surpassed 2019 levels. This has been true within our Meetings & Events business: we have seen the number of meetings during certain months and locations exceed 2019 levels, and our clients’ small and simple meetings have increased by 25%.

With many companies around the world operating with remote workforces or hybrid office environments, the need to bring employees together has never been greater nor more widely recognized. According to Stanford economics professor Nicolas Bloom, the shift to work from home (WFH) is the largest shock to labor markets in decades and has seen a six-fold jump compared to pre-pandemic WFH trends. In-person meetings and events have proven to be the most effective way to drive employee wellness and retention, instill company culture and corporate values, improve team bonding, and increase professional development. Prior to the pandemic, internal meetings were often an afterthought for many organizations. This shift in priority offers a clear opportunity for the meetings and events industry to expand its impact and reach.

From an activity perspective, survey respondents in every region anticipate that in-person meetings, as well as the number of attendees at those meetings, will increase across the board; 87% of meetings are expected to have an in-person component – that’s 6% higher than predictions for 2022. Virtual and hybrid meetings are expected to be less of a focus for all regions except Asia Pacific, where nearly half of their meetings and events will be hybrid and one-sixth virtual. Meeting spend is expected to increase globally and, according to survey respondents, will largely be driven by their organization’s growth plans. The average cost per attendee is also expected to increase globally, by 1.5% for small and simple meetings to 3% for conferences and tradeshows.



GERARDO TEJADO

Senior Vice President,
Global Value
Development and
General Manager,
Meetings & Events

Source: North American, European, Latin American, and Asian Pacific Surveys and Interviews from American Express Meetings & Events, 2022.

A sign of a thriving environment is the unanimous desire among clients, meeting planners, and suppliers to simplify and streamline the planning process. Everyone is at capacity and searching for time efficiencies. Within our Meetings & Events business, we see a continued trend for short booking windows with lead times 25% shorter than in 2019. We expect to see continued innovation and automation for small and simple meeting bookings, the RFP process, and other repetitive tasks. Attendee experience technology continues to be in demand as meeting owners aim to meet attendance goals, connect in-person and virtual audiences, and deliver unique experiences.



The industry is getting serious about sustainability and diversity, equity, and inclusion (DE&I) in 2023.”

The industry is getting serious about sustainability and diversity, equity, and inclusion (DE&I) in 2023. Many organizations have publicly committed to it, and they now need to cascade their sustainability goals to their meeting programs. We can expect the levels of climate reporting on meetings and events activities to grow. From choosing destinations that promote sustainability, to selecting sustainably certified venues, organizations are implementing robust strategies and processes to minimize their event emissions and report on their progress to internal and external stakeholders. From a regional standpoint, Europe continues to be the leader in sustainability practices.

Eighty-seven percent of survey respondents say their organizations or clients actively strive to incorporate DE&I into their meetings and events. Using minority-owned suppliers is the number one way globally that organizations incorporate DE&I into their meeting programs. In our special section “Designing Inclusive and Safe Events,” we explore ways to make meetings and events safer for women and minority attendees.

Our interview panel stressed that strong supplier relationships are more important than ever these days. It’s a seller’s market and that will likely continue into 2024, as space, air, and F&B availability are expected to remain constrained while suppliers deal with labor shortages, ongoing supply chain issues, and inflation. Clients who are flexible and clear on what the goals are for their meetings are more likely to achieve their objectives.

We are pleased to see a renewed respect for the value of meetings and events, as understanding of the sector’s critical role in building culture and driving business continues to grow. This respect, combined with the industry’s depth of knowledge and experience, signals a bright future indeed.

Saludos,
Gerardo Tejado

Senior Vice President,
Global Value Development and General Manager,
Meetings & Events



The Big Picture

Drew Crawley
Chief Commercial Officer,
American Express Global Business Travel (Amex GBT)

This report comes at a defining moment for the travel and meetings industry. It's a time of change, challenge, and opportunity. But what's clear is that business travel and meetings are back. The removal of travel restrictions triggered a colossal release of human energy around the world, as people and organizations rushed to reconnect. And while we face clear and present headwinds – inherent disruption across the travel eco-system, rising inflation, and an energy crisis created by Russia's war in Ukraine – demand continues to grow.

The findings in this report reflect that strong desire to connect. With teams more dispersed and working remotely, organizations have a greater understanding of how important it is to bring people together – to drive creativity and motivation, to recognize and reward, to attract and retain the best talent. We're seeing this in the way our own M&E business has led the recovery: while our travel transactions have been strong – surging 50 percentage points against 2019 levels in just five months during the first half of 2022 – we find in this report that M&E demand has been even stronger, at times topping 2019.

Of course, this accelerated growth comes with challenges. Disruption, complexity, and volatility are here to stay. Travel and meetings programs need to be agile, resilient, robust – and the more integrated they are, the better. At the same time, those changing work patterns have forced us to rethink the way we interact and connect with each other. Meetings and events are now central to building a company culture. That's why travel and meetings professionals are playing an increasingly important role within their organizations. We are all in the connections business.

Companies that have consolidated travel and meetings programs cite a wide range of benefits, such as improved reporting, contracting, consistent standards, time and resource efficiencies, savings, visibility on spend, duty of care, and more. A more holistic picture of your supply database also helps meet sustainability and diversity goals. Now is the ideal time to capitalize on these opportunities and drive meaningful change across your program.

In this 2023 Global Meetings and Events Forecast you'll find measured optimism combined with a willingness to embrace all the opportunities that come with change. I hope you find it to be an insightful and valuable resource.

“Travel and meetings programs need to be agile, resilient, robust – and the more integrated they are, the better.”

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KEEP CLIMBING



Global Activity



Firing on All Cylinders

The 2023 Forecast is based on a survey of 580 meetings and events professionals from around the world and interviews with industry leaders, who are listed on page 2. The survey ran in May and June 2022. Respondents represent corporations, associations, buyers, and suppliers from five continents and 23 countries. The result is a statistically and globally representative picture of the 2023 meetings and events industry.

Meetings Activity

The mood among meeting professionals at the time of the survey is positive and also overwhelmed. The return to in-person meetings is happening more rapidly and at a greater volume than expected; however, the numbers are expected to stabilize in 2024. Survey respondents are very optimistic about the health of the meetings and events industry next year: Asked how optimistic they are on a scale of 1–10, 77% chose 8 or above (vs. 71% last year). Organizations clearly appreciate the need to bring people together face-to-face and are willing to spend the money to do it.

In the clamor to book in-person meetings, budgets and policies are not necessarily being adhered to during the approval process. Respondents believe the situation will stabilize by 2023, as clients spend time in Q3-Q4 2022 planning their budgets and meeting priorities for the next year. Two-thirds of survey respondents believe that the overall number of in-person events will return to pre-pandemic levels within one to two years. In some regions, certain types of meetings (internal and small and simple) are already over 2019 levels.

Global Activities

In-person Meetings Roaring Back in 2023!

In-person meetings and events came back in 2022 faster and at a higher level than predicted. Our survey respondents believe they will continue to outpace expectations in 2023.



Sustainability remains a priority

Four in five respondents (80%) say their organization takes sustainability into account when planning meetings and events.

Of these organizations, over ¾ of them have a defined sustainable meeting program strategy in place.



76%

Sustainable meeting program strategy

Attendee numbers are going up

Meeting types with the largest anticipated increase in attendees:

1.

Internal team meeting/training

2.

Product launch

3.

Small/simple meetings

Meeting spend is rising

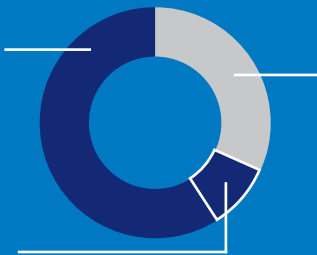
Companies expect to invest more in M&E

65%

say meeting spend is increasing

10%

see increases of more than 11%!





35%

say meeting spend is staying the same or decreasing

There will be more space

Meeting professionals expect more guest rooms and meeting spaces to be available in the next two years.

Percentage of respondents predicting increases in:

	2023	2024
Hotel rooms 	45%	59%
Meeting space 	49%	58%

And the cost per attendee will increase



“Average rates continue to rise due to higher labor, food, and other fixed costs, along with the impact of inflation – we believe that trend will continue with high demand.”

– Jonathan Kaplan
VP, Global Sales Strategy, IHG

Meeting Prevalence

All meeting types are expected to increase in 2023, particularly in-person meetings. Globally, predicted in-person increases range from 3.3% for conferences and tradeshows to 4.2% for small and simple meetings. Virtual and hybrid meetings are expected to see more modest increases, ranging from 0.2% more product launches to 1.6% more client and customer advisory boards.

Virtual fatigue is real – attendees want to see each other in person. Organizations want their customers and employees to meet in person, too. Hybrid is currently a fallback rather than first option for a format, but survey respondents differ in what they expect

to see in 2023. Overall, a strong majority of respondents expect in-person meetings and events to be their main focus, with only 29% of meetings in North America and 33% of meetings in Europe expected to be hybrid. That figure is somewhat higher in Asia Pacific (47%) and Latin America (41%).

Internal meetings are expected to see the biggest percentage increase in the number of attendees, with a 4.5% expected increase globally. All meeting types are predicted to see substantial increases from 2022 numbers, with the lowest still significant 3.7% increases for both conferences and incentives.

Meeting Spend

Overall meeting spend is predicted to increase by 3.1% on average, which is the same as last year's survey. Broken down by region, 12% of respondents in both North America and Europe expect their budget to increase significantly, by 11% or more. The cost per attendee for all meeting types, in all formats, is predicted to increase as well, by a low of 1.5% for small and simple meetings to a high of 3% for conferences and tradeshows.

In terms of cost per attendee per day in US dollars, internal and small and simple meetings show the greatest disparity in Asia Pacific. An internal meeting in Asia Pacific is expected to cost \$711 per attendee per day, while in North America it's expected to cost \$554 per attendee per day. A small and simple meeting in Europe is expected to cost \$427 per attendee per day, vs. \$565 in Asia Pacific.

If budgets were reduced, respondents said the two areas they would cut first are off-site optional activities (23%) and number of nights (20%). If budgets were increased by 10%, improving the on-site experience (32%), and increasing the use of technology (23%) are the top two areas planners would focus their spend on.



Hybrid is currently a fallback rather than first option for a format, but survey respondents differ in what they expect to see in 2023.”

Hotels and Meeting Space

Supplier capacity is expected to increase somewhat in 2023. Meanwhile, some hotels are already reporting bookings above 2019 levels.

“Short lead times and hesitating to book meetings until the very last minute are lingering issues from the pandemic,” explained Milton Rivera, VP of sales, American Express Meetings & Events, “and some organizations are still not prepared to plan too far in advance.” This hesitation, combined with economic pressures, ongoing staffing issues, and unprecedented competition in the market for available space will continue to put pressure on rates in 2023.

Availability in 2023 is expected to be tight, with respondents predicting modest increases for room availability (0.7%) and meeting space availability (1.4%). The pressure is expected to ease by 2024, as respondents expect to see increases of 2.5% for rooms and 2.7% for meeting space.

Globally, respondents predict hotel rate increases of 4.9% in 2023, although there was variation among the regions, with only a 2.5% predicted increase in Asia Pacific compared to a 7.4% predicted increase in North America. “Average rates continue to rise due to higher labor, food, and other fixed costs, along with the impact of inflation – we believe that trend will continue with high demand,” said Jonathan Kaplan, VP, America sales, IHG Hotels and Resorts.

Global Air

While footage of airport chaos dominated news stories in the summer of 2022, industry leaders stated within interviews that although the airline industry is still experiencing major challenges, by 2023 most major routes will be back in service, and travelers, both business and leisure, will be more confident about booking international flights. Industry leaders point to a lag in recovery for airline route frequency and seat capacity.

Almost one-half (49%) of respondents say they frequently use a travel management company to book group air. Many respondents (41%) report using online booking tools and nearly one-third (32%) report working with an internal group air specialist. Favorable group air rates is the number one thing respondents value in their group air provider, which is a change from last year, when crisis management topped the list.

More than one-third (38%) of meeting planners said that group air rates were very or extremely influential on their destination choices. Among supplier respondents, 68% of air suppliers say their rates will be increasing – of those, 20% say rates will be up by 11% or more. “Similar to meetings industry suppliers, we are seeing robust demand, coupled with cost increases, and overall inflationary pressures,” explained Rob LeBel, managing director, specialty and mid-market sales, Delta Air Lines. “And while these factors could potentially impact future meeting attendance and budgets, having mutually equitable partnerships and programs that discount travel can help to offset the rising costs associated with the return to travel.”





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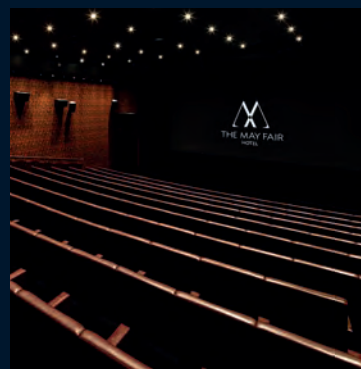
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Global Trends



Blazing a New Trail

The meetings and events industry is experiencing an unprecedented recovery, and all signs point to a busy 2023. More meetings and events, more attendees, higher budgets, and higher rates are all expected. Amid all the action, a new focus on partnerships, sustainability, diversity, equity and inclusion, and technology is also underway. Meetings and events are back, and the way they are planned is evolving.

If the pandemic taught us anything, it's that meeting professionals can be even more flexible, creative, and resourceful than they themselves believed. That spirit of being open to new ways of working is well worth holding on to. In interviews, our panel of industry leaders emphasized that meeting professionals have been given the opportunity now to take a hard look at how they work and how it can change for the better.

Top of mind is the desire for more education, use of technology for automation, and frank communication between planners and clients. "Stress levels are currently high on both sides to get meetings 'right' and have 'perfect' events," said Linda McNairy, vice president, Americas, American Express Meetings & Events. But perfect means different things to different people. Planners can alleviate much of this stress by being as clear in their communications with clients as possible. McNairy explained, "Educating clients about what they can realistically expect from their budgets and lead times, and why they may need to be more flexible with their demands, should happen at the beginning of any event planning process." Encouraging clients to be clear and specific about what their goals are for an event means planners can help them to spend their budgets more

Source: North American, European, Latin American, and Asian Pacific Surveys and Interviews from American Express Meetings & Events, 2022.

Global Trends

Meetings Drive Culture in 2023

Bringing staff together for training and team building is no longer optional with a dispersed workforce. Companies now recognize the vital role in-person meetings play in strengthening culture, onboarding staff, increasing employee engagement and communicating corporate values and goals.



Almost half of organizations adopt hybrid or remote working

Respondents say their offices are:

40%

Hybrid/partially open

+

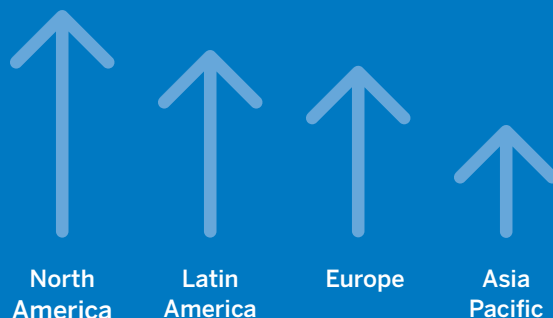
8%

Fully remote/office closed



But employees NEED face-to-face meetings

Internal meetings will continue to be the fastest growing category in 2023 across all regions



Companies invest in quality internal meeting experiences



40%

Held in a different city



45%

Include overnight accommodation

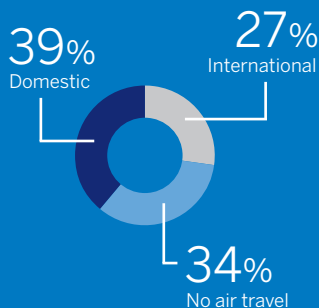


39%

Include social activities/networking



Require air travel



And leaders are excited about the opportunities!

“Meeting in-person allows for more trust, accountability and collaboration, and gathering in off-site conference rooms helps to eliminate office distractions.”

– Meetings Executive, North America



effectively. When both sides understand from the beginning what the requirements and measures of success are for a meeting, expectations are more likely to be met and organizations will feel confident that they're getting the best return for their program dollars.

Focus on Internal Meetings

According to a 2021 McKinsey report, "What executives are saying about the future of hybrid work," 90% of large companies have committed to hybrid work plans for their employees. Many organizations are not expecting their employees to come back into the office full-time anytime soon, if ever. But dispersed workforces come with many challenges: organizations need to guard against lack of employee engagement, reduced understanding of business goals, difficulty training staff, and employee burnout, and more.

Internal meetings, particularly in-person internal meetings, continue to be a higher priority than they were pre-pandemic, as organizations see the value of bringing their employees together face to face as a way to improve productivity, create shared culture, and reduce turnover. A new question in this year's survey illustrates this trend – we asked respondents about the location, accommodations, programming, and travel characteristics of their internal meetings in 2023. The results validated that organizations are willing to spend money on internal meetings, with, for example, 45% including overnight accommodations, 27% including international air travel, and 40% being held in a different city than the corporate office.

It's not just large organizations that are increasing their in-person internal meetings. Small and medium enterprises (SME) are also using face to face meetings to strengthen their workforce and improve culture. According to Amex GBT's Q2 2022 Earnings Report, SME travel is recovering faster than any other customer segment. In the second quarter of 2022, SME transactions reached 84% of 2019 levels. This compares to an overall transaction figure from all customer segments of 76% of 2019 levels.

"How we work has fundamentally changed and, therefore, how we're conducting business has changed," said Ciaran Delaney, founder and CEO of hubli, an enterprise booking platform for in-person meetings and group lodging. "And that's having massive repercussions in relation to the motivations to meet. Companies are now having internal meetings more regularly to welcome new employees who are working remotely and syncing the team to build culture and productivity."

Destination Choices

Regional and domestic travel continue to be preferred for the rest of 2022 while planners wait to see how travel restrictions and delays in securing passports and visas play out. Our interview panel said that they have seen some planning underway for large international events in 2023 though lingering uncertainties about restrictions, capacity, and rising costs are still factors.

Locations that would normally be considered leisure travel destinations have seen big bumps in numbers of meetings and events and are expected to continue to be popular in 2023. The increased space and room availability in larger tourist destinations coupled with their more frequent air service and higher staffing levels make cities like

Las Vegas and Madrid particularly attractive to planners who are booking events with short lead times and therefore fewer options.

Mid-range properties continue to be popular for smaller team meetings, where the destination is less important than bringing people together. One industry leader remarked that they have seen a growing number of requests from their SME clients for “what we are calling ‘micro events’ – for example, 2 days with a total of 30 people.” They believe there is a greater need for smaller meetings to bring scattered teams together and also meet with clients in new locations post-pandemic.

As international travel returns to 2019 levels, there is expected to be a strong demand for incentives and employee recognition in luxury markets.

Attendee Wellbeing

Attendee health and wellness continues to be a focus for meeting planners, for both in-person and virtual/hybrid formats. Face-to-face meetings in particular are seeing a shift in how attendee wellbeing is addressed: instead of packing schedules with activities from early morning to late evening, planners are recognizing that not everyone can or wants to sustain such a high level of activity. Some organizations have implemented policies that travel should, as much as possible, not interfere with their employees' personal lives, which means avoiding booking flights on weekends. And as we've seen since the pandemic, attendee communication is key.

“Meeting attendees have come to expect a lot more communication up front,” said Tina Di Biasio, global director, senior account management, American Express Meetings & Events. “Meeting owners are making sure that attendees are fully aware of what is being planned for them and what their experience will entail inclusive of the provisions made for their safety and comfort.”

Attendee engagement for in-person meetings is less of a concern than it used to be – meeting professionals say that people are so happy to have the opportunity to be back together face-to-face again that the engagement happens naturally. For virtual attendees, engagement remains a concern as planners continue to report a lack of engagement and poor attendance to be among their top issues with virtual meetings (in addition to technology issues).

Technology

The digitalization of meeting management has exploded over the last few years, causing a mini-revolution in how meetings and events are planned. Automated software platforms offer streamlined and simplified booking solutions for small and simple meetings and other straightforward bookings. Users can review space, rates, and room availability, and whether the meeting adheres to meeting policies and sustainability requirements with the click of a button. For planners who use these platforms, removing some of the manual booking processes means they can spend more time being creative and strategic with programming and less time on busy-work. For the



As international travel returns to 2019 levels, there is expected to be a strong demand for incentives and employee recognition in luxury markets.”

organization, booking platforms increase the likelihood that meeting owners will work with preferred suppliers. Additionally, organizations have better and more timely data about their meeting program's performance towards its goals, following of corporate meeting policies, and achievement of sustainability and diversity targets.

Beyond reducing administrative and manual work, meeting technology also addresses a critical issue: reduced staffing levels in both supplier and corporate offices. In particular, response times to RFPs are longer, creating a bottleneck in the booking process.

As meeting owners continue to demand more autonomy over the booking process, "driving adoption for simple meeting technology will be crucial in the next few years," according to Chuck Ghoorah, co-founder and president of worldwide sales and marketing at Cvent. "Planners need instant booking technology, and user-friendliness is the North Star."

Air and Hotel Sectors

Strong relationships with suppliers are crucial when the competition to book space and vendors is so high. It's a seller's market and that will likely continue into 2024 as availability is expected to remain constrained. Travel and meeting management companies that have strong partnerships with trusted suppliers are better positioned to offer clients their first choices in venues and dates.

The focus on simplification and automation extends to how meetings and events are planned, with meeting professionals and air and hotel suppliers using technology to remove some of the manual processes that used to be required.

In the drive to attract clients and demonstrate their corporate responsibility, many global air and hotel suppliers have published major sustainability and DE&I targets. They are also investing in infrastructure and technology improvements to make life easier for travelers. Contactless bag drops and facial recognition systems at airports, keyless hotel rooms, and online check-ins have made traveling much more streamlined and enjoyable – why wait in line if you don't have to?

Meetings Management

The meeting function in organizations has grown in importance post-pandemic, as evidenced by the renewed focus on internal meetings and team building. This means more small meetings are being booked by departments that haven't historically been in charge of meeting planning, and may not be aware of their organization's meeting management policies. Increasing the stakeholder adoption of their meetings program and policies is expected to be easier in the next year because of this. The disruptive nature of this environment firmly establishes the value of professional meeting planners – whose role is becoming more challenging. They are not only responsible for traditional event design and logistics but also virtual and hybrid components, and are advisors for sustainability and DE&I, in addition to managing attendee experience and wellbeing.



Diversity, Equity, and Inclusion

Improving DE&I continues to be an important goal for meeting owners globally, according to survey respondents (87% say their organization actively strives to incorporate DE&I into their meetings and events). There are multiple ways to accomplish these goals, including choosing destinations with active outreach to multicultural groups, hiring certified diverse suppliers, and booking venues that are 100% accessible.

The business case for increasing DE&I is clear, according to Patrick Rush, senior regional director of Asia Pacific, American Express Meetings & Events. “For organizations to maximize return on investment including attendance, they need to be inclusive and have a clear charter in terms of diversity. It is one of the key criteria that meeting owners and delegates will consider in the future – if they’re not already today.”

Sustainability

Sustainability has moved from a buzzword to a corporate mandate, according to our interview panel and survey respondents. Meeting owners are seeing demand intensifying for event sustainability initiatives and need reporting from all suppliers and sources. Meetings and events owners should prepare to integrate sustainable solutions to reduce, measure, and report on event sustainability impacts and progress. Technology platforms are essential to provide stakeholders with the emissions data needed to track and communicate progress.

Education is also key for engaging meeting planners and teaching them about sustainable event planning tools that can provide them with the right processes to plan sustainably and take into account everything from location choices with the smallest carbon footprint, to certified venues, to food and beverage choices that avoid emissions.

According to GBTA’s June 2022 Sustainability Report, 90% of organizations said they required professional guidance in their sustainability journey. “Now that there is global consensus that sustainability must be a factor within meeting programs, organizations are looking for help to develop a road map that will specifically address education, planning, tracking, and reporting,” said Eloísa Urrutia, head of M&E sustainability solutions, American Express Meetings & Events.

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Regional Trends



Creating Connections in a Complex Time

Meeting professionals are used to dealing with challenging situations, but the changing workplace and a focus on diversity and sustainability mean they are working in a much more complex environment these days. A dispersed workforce has significantly raised the stakes on the need for high-quality internal meetings. At the same time, meeting management policies that reflect corporate messaging and branding on DE&I and green practices are being adopted and applied to all types of events, including internal and small and simple meetings. Planners across all regions report that they are implementing strategies to both strengthen corporate culture and meet their organization's goals, although how they achieve those goals differs among the regions.

Regional Trends

Aligning Around The Globe

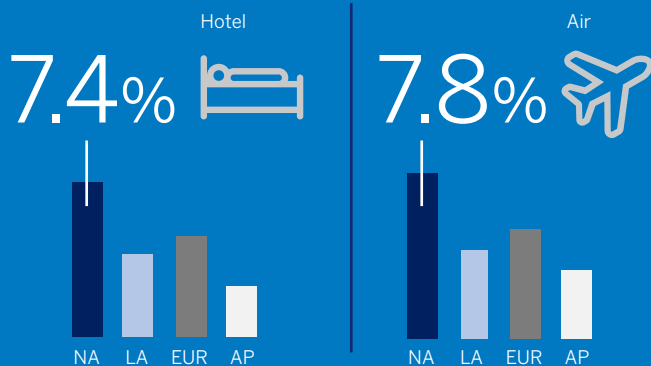
Every region is optimistic about meetings and events growth in 2023.

Here's what stands out across the regions.



North America expects to see the highest rate increases

Year-over-year expected increase in average group rates



While Asia Pacific expects to invest the most per attendee for in-person, internal meetings

Cost per attendee per day for in-person, internal meetings



\$662	Latin America
\$554	Europe
\$554	North America

Latin America predicts the largest increase in attendees for every meeting type

Percentage increase in attendee numbers

5.08% – 5.88%

Across:

In-person



Hybrid



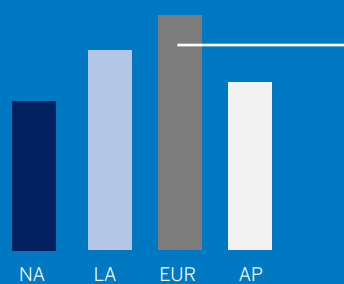
Virtual



And European meeting planners are the most likely to track their event's carbon footprint

Percentage who provide post-event CO2 calculations

28%



North America

Meeting professionals in North America believe 2023 will be a year of fast-paced growth and they are up for the challenge. They are feeling more secure about their jobs – on a scale of 1 to 10, 65% chose 8 or higher when asked how optimistic they were about their career options in the industry, an increase from 56% in the 2022 survey. They also believe the industry overall is in good shape: 72% said they were an 8 or higher on a scale of 1 to 10 when asked how optimistic they were about the health of the industry. The region had the highest percentage of respondents who said their offices were fully remote, at 15%, while 33% said their offices were open on a partial basis for hybrid workforces, and the remaining 52% said their offices were fully open.

Meetings Activity

North American respondents are predicting an increase in every type of in-person meeting in 2023, with the largest increase expected to be in small and simple meetings, at 4.7%. In the virtual and hybrid format, respondents expect the numbers to decrease for every meeting type except small and simple meetings (which will remain flat at 0.5%) and client and customer advisory boards. The largest predicted decrease in virtual and hybrid meeting types is in the number of product launches, which are expected to be 0.9% lower than the previous year.

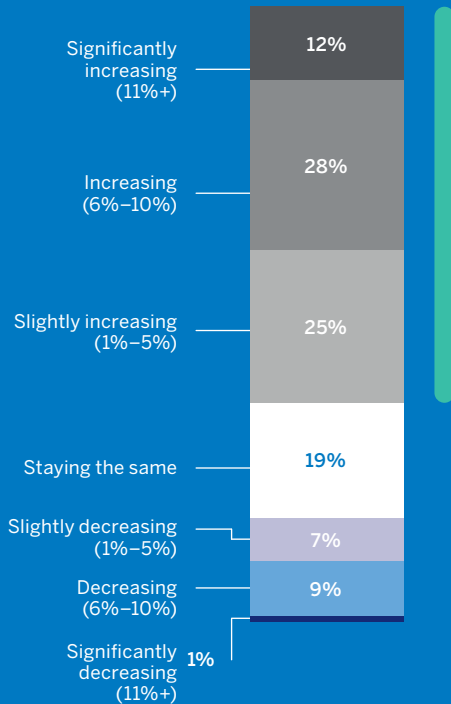
When it comes to choosing an in-person meeting instead of a virtual or hybrid one, planners say flexible cancellation and attrition terms and favorable rates are the top two factors that influence their decisions.

Sixty-three percent predict attendee numbers will return to 2019 levels in the next one to two years. Although they predict decreases in the number of virtual and hybrid meetings, overall attendees are expected to increase at every type of meeting

North America – Key Indicators for 2023

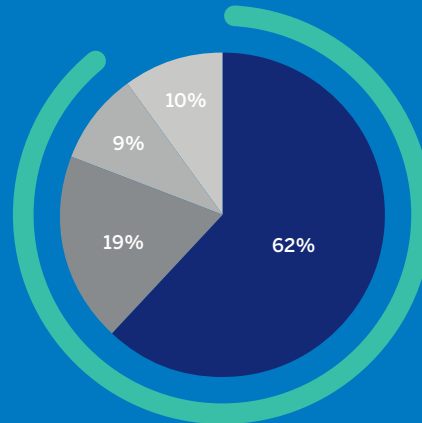
Overall meeting spend

65% expect their meeting spend to increase, compared to 68% in 2022



Meetings by format

90% of meetings will have an in-person component, compared to 88% in 2022



● In-person only ● Hybrid multi-hub*
● Hybrid ● Virtual only

*Hybrid multi-hub is two or more in-person meetings connected via a virtual platform

Source: North American Survey from American Express Meetings & Events, 2022.

compared to 2022 numbers, ranging from 4% for conferences and tradeshows to 5% for client and customer advisory boards.

Respondents in the region believe hotel space will be very tight in 2023, saying they expect decreases in availability of 0.6% for rooms and 0.1% for meeting space. They predict that will ease somewhat in 2024, with increases of 1% for rooms and 1.5% for meeting space.

In a new question this year, survey respondents were asked what percentage of their internal meetings will include travel and accommodation requirements, among other characteristics. North American respondents said 54% will require overnight accommodation, 51% will be held at a hotel, and 46% will be held in a different city than the corporate office.

Meetings Budgets and Planning

Overall meeting spend is expected to be up by 3.8% in the region, which is slightly lower than in 2022 (4.2%). Respondents in North America are also expecting an increase of

7.4% in group hotel rates, and a 7.8% increase in group air rates. Respondents say that if their budget were reduced by 10%, the first area they would cut for in-person events is the number of nights, followed by off-site optional activities, and off-site evening events.

Survey respondents were asked to break out their expected cost per attendee per day (US dollars, excluding air costs) by meeting type. Meeting professionals in North America predict increases for every type, for both in-person and virtual and hybrid formats, ranging from 2% for small and simple meetings to 3.1% for senior leadership and board meetings.



“I am most excited about a chance to be together and rebuild our corporate culture.”

Meetings leader in North America

Regarding meeting management policies, 69% of respondents say their organization has a formal policy for meetings, and 70% have a centralized staff to support meeting planning and execution. Safety and security requirements and a formal approval process are the two components most likely to be explicitly mentioned in an organization's meeting policy.

Sustainability and DE&I

Seventy-one percent of respondents say their organization considers sustainability when planning a meeting or event; of those, 70% are working with a defined sustainable meeting strategy. Minimizing paper usage, choosing green suppliers, and applying energy-saving and waste reduction practices are the top three ways they meet their sustainability targets.

When it comes to diversity, equity, and inclusion (DE&I), 81% of respondents in the region say their organization actively strives to incorporate it into their meetings and events. Choosing diverse speakers and diverse or minority-owned suppliers, particularly food and beverage suppliers, are the top two ways they accomplish that.

Top destinations

The top 5 meeting destinations in North America, based on client data from the American Express Meetings & Events Meetings Insight platform, indicate that the major urban centers are in high demand.

1. Las Vegas, Nevada
2. Orlando, Florida
3. New York, New York
4. Dallas, Texas
5. Atlanta, Georgia

Source: Top North America city destinations based on sales of event services by American Express Meetings & Events, Sept. 2021 – Aug. 2022.



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Europe

Meeting professionals in Europe are feeling positive about 2023: 75% said they would rank their optimism levels at 8 or higher on a scale of 1 to 10, which is quite a jump from last year (59%). More than half, 58%, said their career options were good to excellent. Europeans were the most likely to say their organizations had fully reopened their offices (54%); of the remainder, 42% said their workplace was partially opened or hybrid; only 4% said they were fully remote.

Meetings Activity

European respondents are predicting an increase in every type of in-person meeting in 2023, ranging from a 3.4% increase for product launches to a 4.7% increase for small and simple meetings. The number of other virtual and hybrid meeting types is expected to remain similar to 2022 levels. The only virtual and hybrid meeting type with an expected increase of note is small and simple meetings, at 1.1%.

When it comes to choosing an in-person meeting vs. a virtual or hybrid one, planners say flexible cancellation and attrition terms and supplier flexibility are the top two factors that influence their decisions.

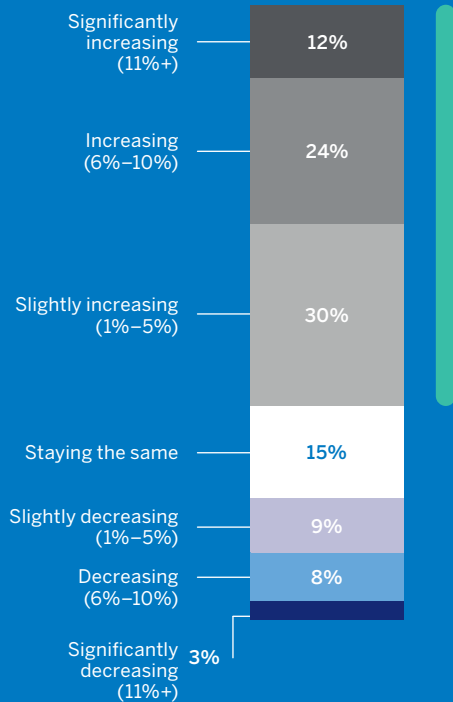
In-person attendee numbers are expected to return to 2019 levels within one to two years according to 69% of European respondents. Every meeting type, whether in-person, virtual, or hybrid, is predicted to have an increase in attendee numbers in 2023, ranging from an increase of 2.8% for incentives and special events to an increase of 4.2% for internal and team meetings.

Europeans are guarded about the outlook for room and meeting space availability in 2023, with respondents predicting only 0.3% and 0.7% increases respectively. They expect availability to open up more in 2024, though, by an expected increase of 2.7% for rooms and an increase of 2.9% for meeting spaces.

Europe – Key Indicators for 2023

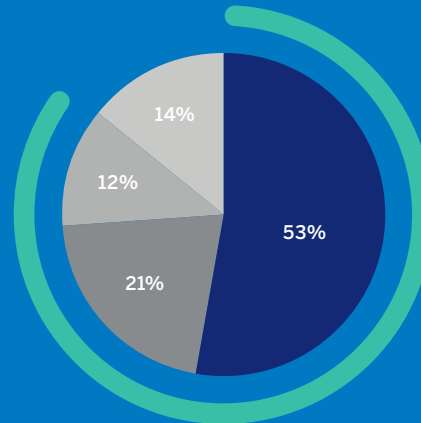
Overall meeting spend

66% expect their meeting spend to increase, compared to 64% in 2022



Meetings by format

86% of meetings will have an in-person component, compared to 81% in 2022



● In-person only ● Hybrid multi-hub*
● Hybrid ● Virtual only

*Hybrid multi-hub is two or more in-person meetings connected via a virtual platform

Source: European Survey from American Express Meetings & Events, 2022.

Internal team meeting characteristics in Europe mirror those in other regions, with a few variations – 43% will be held at a hotel, 40% include overnight accommodation for attendees, and 35% will be in a different city than the organization's corporate office location. European respondents were the most likely to say that internal meetings would be held somewhere other than a corporate property and not require international air travel, with only 26% saying internal meetings would be held on corporate property and only 22% to include international air travel.

Meetings Budgets and Planning

Overall meeting spend is expected to increase by 3.2% in the region, up from the 2022 prediction of a 2.9% increase. Europeans are predicting fairly substantial increases of 4.8% in group hotel rates and 5.2% in group air rates. The first area meeting professionals would cut for in-person events if budgets were reduced by 10% is the number of nights, followed by off-site optional activities.

Survey respondents were asked to break out their expected cost per attendee per day (US dollars, excluding air costs) by meeting type for all formats. Europeans said

incentives and special events will see the biggest jump over 2022 cost per attendee, predicting a 3.5% increase. Like all other regions, the meeting type with the lowest expected cost per attendee is small and simple meetings, with a more modest 1.4% predicted increase.



I am most excited about increasing the diversity of speeches and enriching the content of the conference.”
Meeting planner in Europe

Close to two-thirds of respondents (64%) say their organization has adopted a formal policy for meetings and 71% say there are both an approval process and a component that covers specific technology or software for meeting management. The top three components most likely to be explicitly mentioned in an organization’s meeting policy are safety and security requirements, the use of meeting technology, and the use of preferred suppliers.

Sustainability and DE&I

Seventy-eight percent of European respondents said their organization takes sustainability into account when planning meetings and events; 66% say there is a defined sustainable meeting strategy in place. Minimizing paper usage and applying energy-saving and waste-reduction practices are the most common practices planners said they will use to meet targets. Respondents in the region also were more likely than

respondents in other regions to say that they do post-event CO2 calculations (28%). When asked what they feel is the most impactful sustainability practice, European respondents said that choosing suppliers that are green certified is at the top of the list.

As far as incorporating diversity, equity, and inclusion (DE&I) into their meeting programs, 82% said their organizations actively strive to do so. To achieve it, 39% said providing an option to attend an event virtually was one way, along with focusing on accessibility (28%) and using diverse or minority-owned suppliers (24%).

Top destinations

The top 5 meeting destinations in Europe, based on client data from the American Express Meetings & Events Meetings Insight platform, indicate that meeting planners continue to prefer the traditional urban centers.

1. Madrid, Spain
2. Barcelona, Spain
3. London, United Kingdom
4. Paris, France
5. Manchester, United Kingdom

Source: Top Europe city destinations based on sales of event services by American Express Meetings & Events, Sept. 2021 – Aug. 2022.

Latin America

Meeting professionals in Latin America are feeling extremely positive about what 2023 will bring: consistent with prior years, respondents in the region had the highest levels of optimism about the health of the industry. Ninety percent said they would rank themselves at 8 or higher on a scale of 1 to 10 measuring optimism levels, and 82% said their career options are good to excellent – also the highest percentage of all regions surveyed. One-half (50%) of respondents said their organization’s offices were fully open, 44% said they were partially open, and 6% said their offices are completely remote.

Meetings Activity

Latin American respondents are predicting more of every type of in-person meeting in 2023, from 2.6% more conferences and tradeshows to 4.8% more client and customer advisory boards. They are also predicting an increase in most virtual and hybrid meeting types, including an expected 2.5% jump in virtual and hybrid client and customer advisory boards.

The top two factors that include influence planning for in-person events are supplier flexibility and favorable rates. For context, respondents in the region last year ranked duty of care as a top consideration.

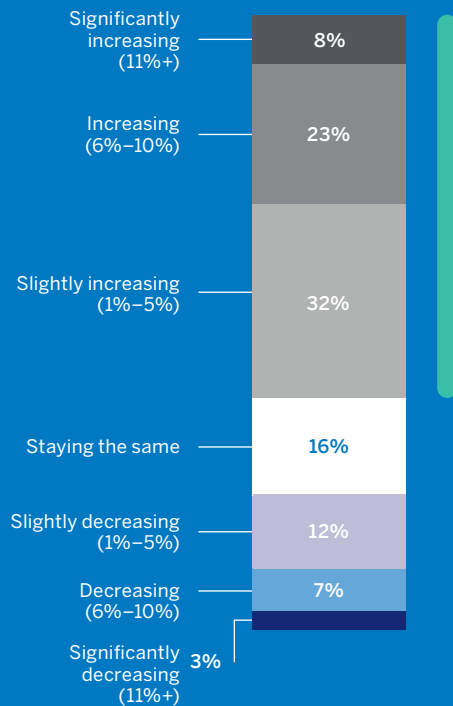
The number of attendees is expected to jump by more than 5% for all meeting types, whether in-person, virtual, or hybrid. Predicted increases range from 5.1% for client and customer advisory boards to 5.9% for small and simple meetings. Respondents in the region were the most likely to say they expect in-person attendee numbers to return to pre-pandemic levels, 78%, in the next one to two years.

Latin Americans are the most optimistic about the availability of room and meeting space in the coming years: room availability is predicted to increase by 2.1% in 2023

Latin America – Key Indicators for 2023

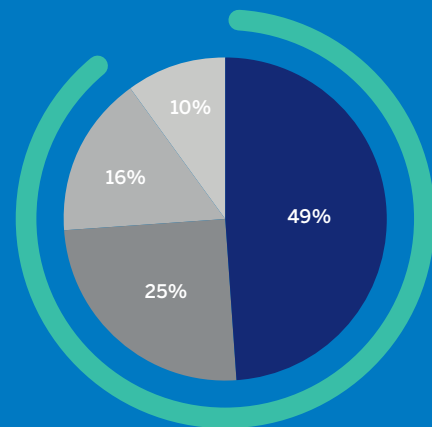
Overall meeting spend

● **63%** expect their meeting spend to increase, compared to 66% in 2022



Meetings by format

● **90%** of meetings will have an in-person component, compared to 76% in 2022



● In-person only ● Hybrid multi-hub*
● Hybrid ● Virtual only

*Hybrid multi-hub is two or more in-person meetings connected via a virtual platform

Source: Latin American Survey from American Express Meetings & Events, 2022.

and 3.6% in 2024. Similarly, meeting space availability is predicted to increase by 3.1% in 2023 and 3.4% in 2024. Leaders in the region have noted that staffing issues are not as severe in Latin America as they are in other regions, which may explain why respondents expect more space to be available.

Regarding the characteristics of in-person internal meetings, a new question in this year's survey, 47% said they will be held at a hotel (rather than on corporate property), 42% said they will include overnight accommodations for attendees, and 40% said they will be held in a different city than the one the corporate office is located in. Also of note, 30% said they would include international air travel for attendees – the highest percentage of all regions.

Meetings Budgets and Planning

Overall meeting spend is expected to increase by 2.6% in the region, down from an expected increase of 3.1% for 2022. Respondents in Latin America are predicting an increase of 4% in group hotel rates, and a 4.2% increase in group air rates. Group

air rates are closely watched in Latin America – 56% said they are very or extremely influential when it comes to choosing destinations, vs. 29% to 36% in other regions. They reported that if their budget was reduced by 10%, the first area they would cut for in-person events is off-site optional activities, followed by number of nights.

Survey respondents were asked to break out their expected cost per attendee per day (US dollars, excluding air costs) by meeting type for all formats. Latin American respondents expect modest increases across most meeting types, from 1.6% for small and simple meetings to 2.2% for senior leadership and advisory board meetings. They expect more significant increases for three meeting types, however: incentives and special events (2.6%), product launches (3.4%), and conferences and tradeshows (3.5%).

Sixty-two percent of respondents say their organization has adopted a formal policy for meetings, an increase over 61% in 2022, and 76% said there is an approval process in place for meetings. Almost three-quarters (74%) say small and simple meetings are included in their policy. Safety and security requirements and the use of meetings planning technology are again the top two components that are the most likely to be explicitly mentioned in an organization's meeting policy. One in five said their policy had explicit language regarding the collection of meeting ROI metrics.



I am most excited about being able to spread events to more people using the best technology.”
Meeting planner in Latin America

Sustainability and DE&I

Regarding sustainability, 86% of respondents in Latin America said their organizations consider it when planning meetings and events, and 84% said there was a defined strategy in place. Minimizing paper usage and applying energy-saving and waste-reduction measures are the two practices they most often use and believe will have the biggest impact on making their events more sustainable.

Supporting diversity, equity, and inclusion (DE&I) is important in the region – 96% said their organization actively strives to support it. Respondents chose a focus on accessibility and using alternative forms of communication, such as sign language interpretation, subtitles, and closed captioning, as the top two ways they incorporate DE&I in their meeting programs.

Top destinations

The top 5 meeting destinations in Latin America, based on client data from the American Express Meetings & Events Meetings Insight platform, include two cities in Colombia.

1. Bogota, Colombia
2. Mexico City, Mexico
3. Cartagena, Colombia
4. Buenos Aires, Argentina
5. Cancun, Mexico

Source: Top Latin America city destinations based on sales of event services by American Express Meetings & Events, Sept. 2021 – Aug. 2022.

Asia Pacific

Meeting professionals in Asia Pacific are feeling positive about the health of the industry in 2023. Almost three-quarters (74%) asked to rank their optimism about the industry on a 1–10 scale ranked themselves an 8 or higher, and 68% believe their career options are good to excellent – up from 56% in 2022. Just over half (52%) of respondents in the region said their offices were fully open; only 2% said they were working completely remotely, and the remainder (46%) said their workplace was partially opened or hybrid.

Meetings Activity

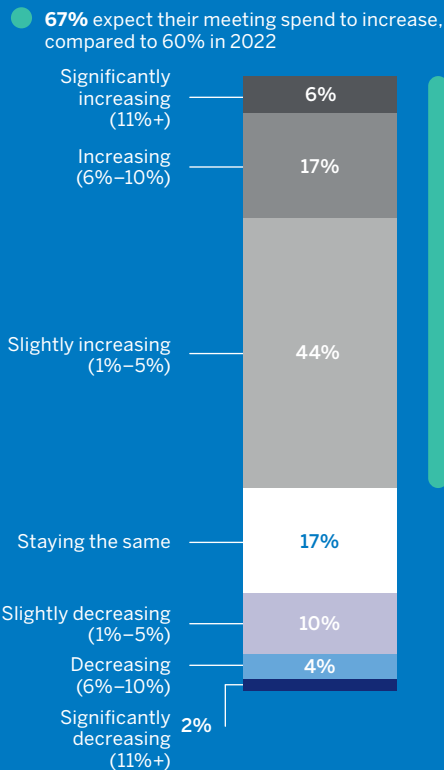
Respondents in Asia Pacific are predicting more of every type of meeting, in both in-person and virtual and hybrid formats, in 2023. The expected increase in virtual and hybrid meetings ranges from 1.3% more product launches to 2.9% more client and customer advisory boards. For in-person meetings, the increase is slightly higher, ranging from 2.4% more internal meetings to 3.2% more small and simple meetings.

Supplier flexibility followed closely by confidence in duty-of-care components are the top two factors that influence planning in-person events vs. virtual ones.

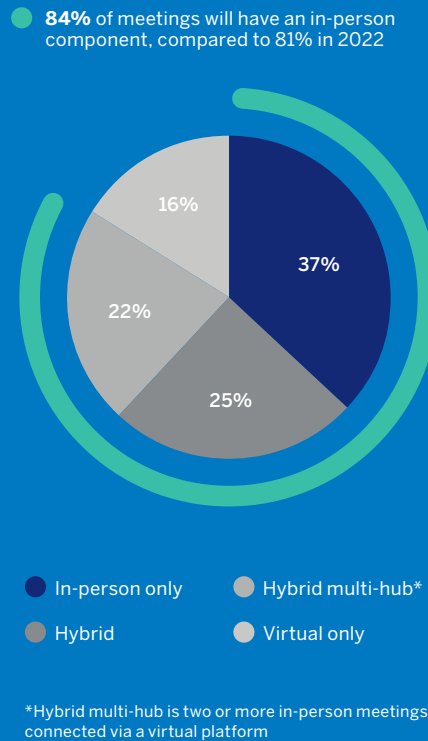
Respondents in the region are somewhat more cautious than other regions in predicting when in-person attendee numbers will return to 2019 levels: 61% said it will happen in the next one to two years, and 36% said it will be in the next three to five years. They are the region with the lowest percentage of in-person only meetings (37% vs. 49% to 62%) so this caution likely reflects the region's firmer restrictions regarding travel and mass gatherings in certain countries. Respondents expect more attendees in 2023 for every type of meeting, whether in-person or virtual and hybrid, with the biggest jump (3.4%) for attendees at internal meetings.

Asia Pacific – Key Indicators for 2023

Overall meeting spend



Meetings by format



Source: Asia-Pacific Survey from American Express Meetings & Events, 2022.

Hotel room availability is expected to increase by only 1.7% in 2023 and 3.4% in 2024. Predictions for meeting space availability are more optimistic, with respondents expecting a 2.6% increase in 2023 and a 3.6% increase in 2024.

Responses to the new survey question about the characteristics of internal meetings were similar in Asia Pacific to the other regions: 43% will be held at a hotel, 41% will include overnight accommodations for attendees, and 36% will include social activities and networking opportunities.

Meeting Budgets and Planning

Overall meeting spend in Asia Pacific is expected to increase by 2.7% in 2023. Respondents are predicting the lowest increase in group hotel and air rates, with expected increases of 2.5% and 3.1%, respectively. If their budget were reduced by 10%, respondents said the areas they would cut for in-person events were a three-way tie: on-site travel staff, off-site evening events, and off-site optional activities (each at 18%). Reducing the number of nights was the fourth most chosen option, at 15%.

Survey respondents were asked to break out their expected cost per attendee per day (US dollars, excluding air costs) by meeting type and in-person and virtual and hybrid formats. Internal team meetings are expected to see the biggest increase in cost per attendee, at 2.6%.

Sixty-seven percent of respondents say their organization has adopted a formal policy for meetings, up from 64% in 2022, and about two-thirds said that their organization had meeting management components including specific technology for managing meetings (68%), centralized staff to support planning and execution (67%), centralized contracting with preferred vendors (67%), and inclusion of virtual and hybrid meetings (67%). Safety and security requirements, the approval process, and payment methods

were the three components most likely to have explicit language in their organizations' meeting policy. The region leads on specific language about meetings ROI metrics and global standardization of meetings policies, at 22% and 30% respectively.

Sustainability and DE&I

When asked whether their organization considers sustainability when planning meetings, 86% of respondents in Asia Pacific said yes, and 83% said there was a defined sustainable meeting strategy in place. Minimizing paper usage (60%) and implementing energy-saving and waste-reduction measures (58%) are the top two practices planners implement to make their meetings more sustainable; 47% also plan to book with suppliers who are green certified.

Supporting diversity, equity, and inclusion (DE&I) is important in the region, with 92% of respondents saying their organization actively strives to incorporate it into their

meeting programs. Using diverse and minority-owned suppliers and ensuring diverse speakers and entertainment are part of the programming are the top two ways that planners incorporate diversity into their events.

Top destinations

The top 5 meeting destinations in Asia Pacific, based on client data from the American Express Meetings & Events Meetings Insight platform, reflect the impact of restrictions in the region over the last year, with Singapore and China not making the list.

1. Tokyo, Japan
2. Osaka, Japan
3. Sydney, Australia
4. Seoul, South Korea
5. Taipei, Taiwan

Source: Top Asian Pacific city destinations based on sales of event services by American Express Meetings & Events, Sept. 2021 – Aug. 2022.



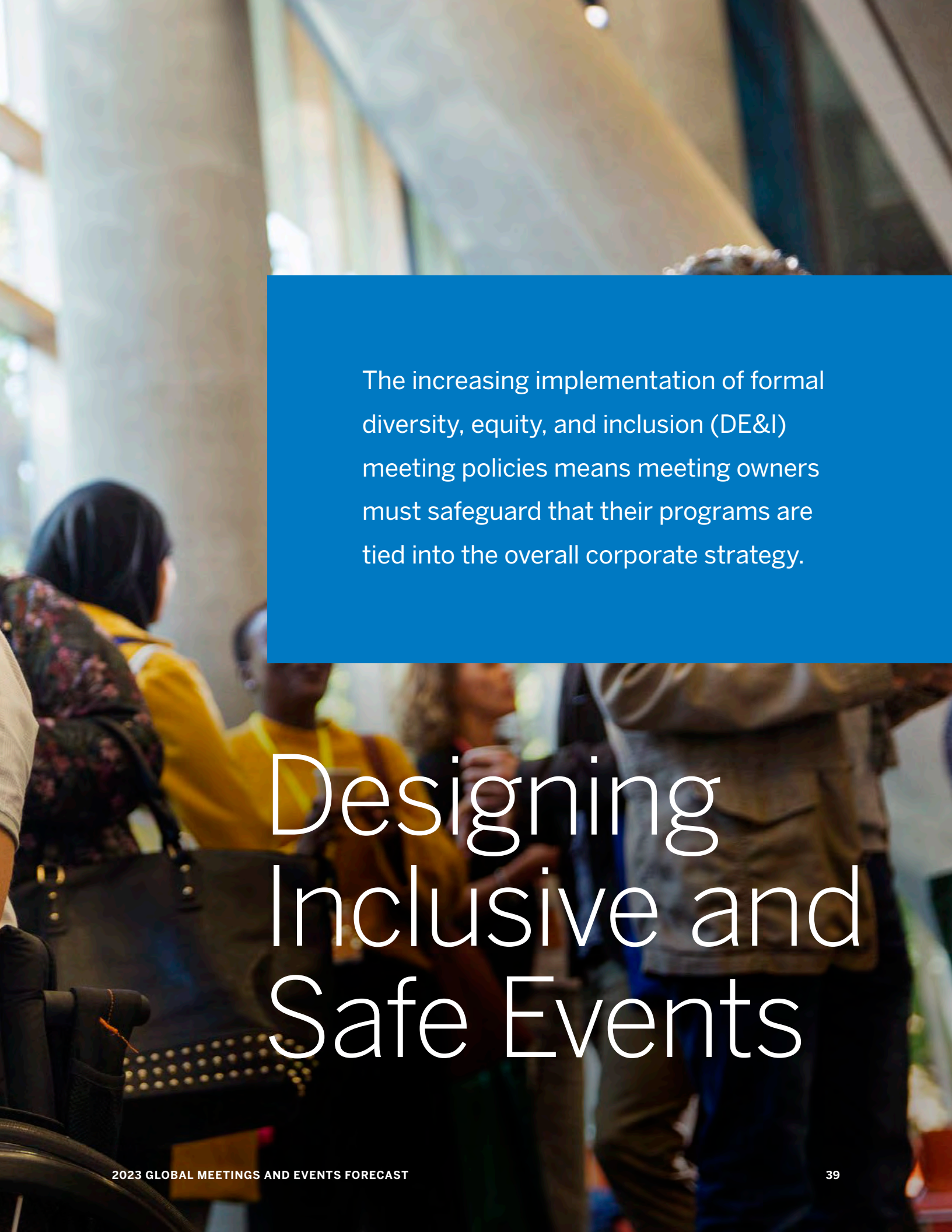
I am most excited about a better on-site experience, using high technology to achieve sustainable development of enterprises.”

Meeting owner in Asia Pacific

Special Sections







The increasing implementation of formal diversity, equity, and inclusion (DE&I) meeting policies means meeting owners must safeguard that their programs are tied into the overall corporate strategy.

Designing Inclusive and Safe Events

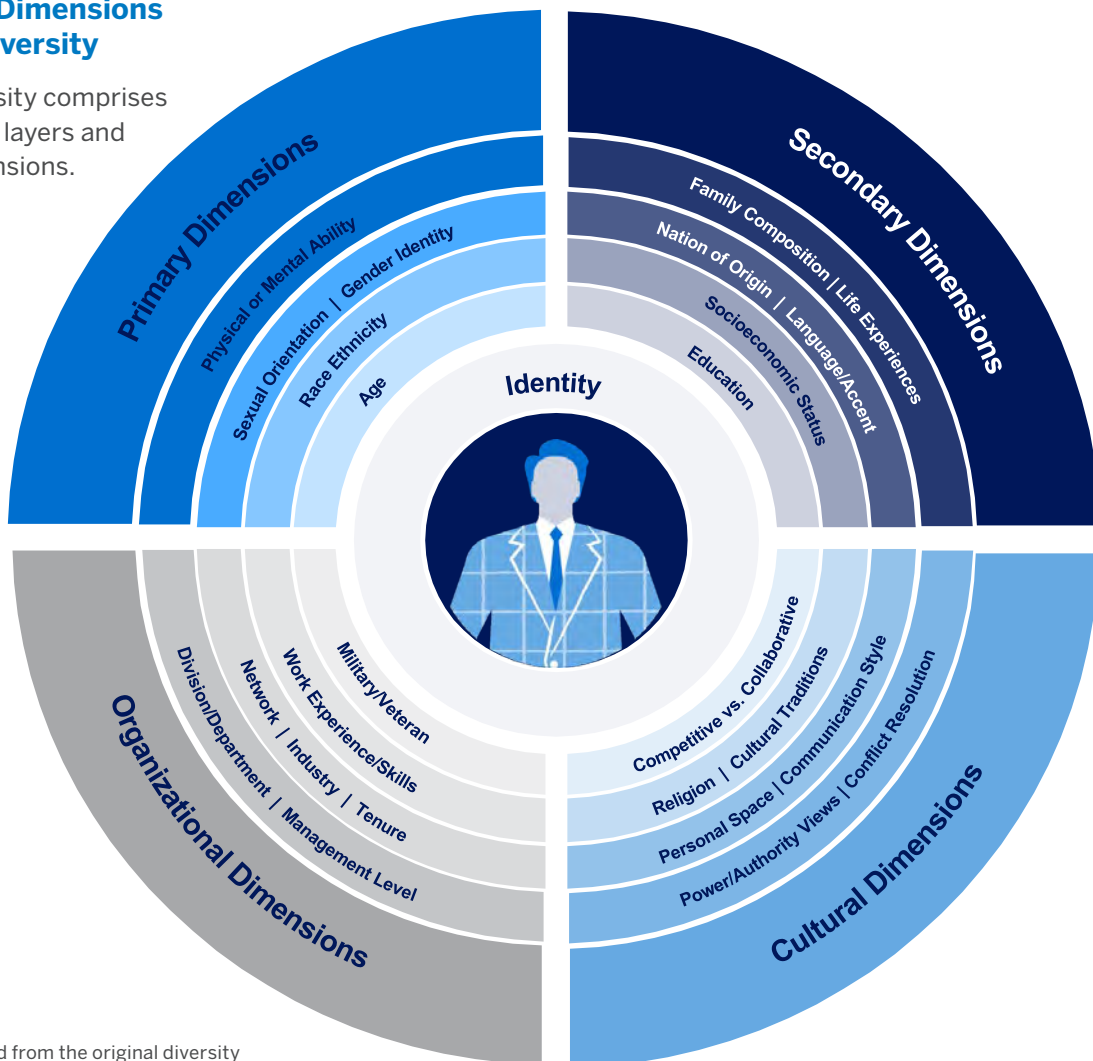
To increase diversity at events, planners must be sure that attendees, presenters, and staff are safe and comfortable. When we talk about safety in terms of meeting planning, we usually refer to it from a macro perspective, thinking about things that could affect all attendees: terrorism, weather, health, etc. But increasing DE&I also means making sure individual attendees are safe at a personal level, based on their specific circumstances and requirements.

“Diversity goes beyond what our eyes can see and people’s unique traits are far more

complex than gender and race,” explains Daisy Crane, business development manager for Travel Partner Network, American Express Meetings & Events. “Diversity has multiple layers and is multidimensional. For example, one’s primary dimensions involve characteristics such as age, gender identity, race, and physical and mental abilities. Secondary dimensions include family composition, nation of origin, language, socioeconomic status, and education. Organizational dimensions relate to professional experiences, occupation, and institutional affiliations. Cultural dimensions include religion and cultural traditions.”

The Dimensions of Diversity

Diversity comprises many layers and dimensions.



Adapted from the original diversity wheel depicted in *Workforce America! Managing Employee Diversity as a Vital Resource* by Marilyn Loden and Judy B. Rosener.

Review Your Corporate Meetings Program Policies

If an organization has specific corporate targets for DE&I, incorporating those targets into a meetings and event program may be as simple as requiring a certain percentage of diverse suppliers (suppliers who are majority owned by under-represented groups) be part of their preferred supplier partnerships, or ensuring that all presentations include sign language interpretation. If no specific targets have been set, it's important to confirm that any meetings and event policies are aligned with the organization's overall values, to achieve greater success with the rollout. A corporate standard that can be followed by all meeting planners in an organization, and includes internal meetings, will offer greater consistency and better results in the long-term.

When it's time to start planning individual events, there are two things planners can do to support their DE&I goals: improve communication with attendees and make sure there's a focus on personal safety.

Start Communicating Early

There's no such thing as being too prepared, from an attendee perspective. Clear communication starting with the first event invitation will help people understand how they would fit into the event and can help encourage them to register. In event literature, use inclusive language and photos that feature people from diverse backgrounds; provide detailed information about the location and venue, including whether it is minority-owned, fully accessible, or certified in any other relevant way. Include links to airport arrival and departure procedures, information about ground transportation options, and what to expect in the area surrounding a venue – are there sidewalks? Would a woman feel comfortable walking alone at night? Are there nearby attractions? The goal is to allow potential attendees to picture themselves in that environment.

If possible, provide the names and contact numbers of organizers who can answer any questions attendees may have about the event.



Do Pre-event Surveys

A pre-event survey is one of the most effective tools you can implement to help attendees feel safe and welcome at your event. Go beyond the basic questions on registration forms and distribute a detailed survey asking registered attendees whether they have any accessibility requirements or other needs. Ask for specifics of what accommodations are needed so you can plan accordingly.

Keep in mind that there are many disabilities that are not visible to others but which still may require accommodation or extra support, such as certain types of seating for people with chronic pain or illnesses, hotel rooms located away from loud areas for those with sleep disorders, or quiet rooms that can be used by people who have neurological or auditory impairments.

Once you have information about an individual's needs, respond with an explanation of how those needs will be accommodated.

In post-event surveys, ask about the suitability of each component in an event and make sure to ask for qualitative responses such as, "Is there anything the event organizers could have done to make you feel more comfortable? Or more welcome from a diversity or inclusivity standpoint?" Document lessons learned regarding DE&I and respond to any suggestions in post-event surveys to let attendees know



how the organization will be incorporating their suggestions in future events.

Always Keep Safety in Mind

Safety has always been a factor in decisions that are made during the planning process. But oftentimes what's considered safe for one group of people may not be for another. For example, are you holding your event in a location where attendees from under-represented groups and LGBTQ+ people are welcomed? Are you planning for attendees to arrive at airports late at night? Put yourself in the shoes of the different types of attendees you are expecting, and ask yourself, if that were me would I feel safe in this situation?

Whenever possible, choose to work with suppliers who have programs in place for people who require extra help – solo female travelers or wheelchair users, for example.

Beyond physical safety, privacy is also important. Give attendees the choice to opt out of photos and recordings. Most people won't but there will likely be some for whom privacy and confidentiality are tied to their personal safety. In the same vein, name badges are excellent tools to

encourage networking and team building but it's best to not lay them out on the registration table for everyone to see, or to insist that everyone display their full name. It's also a good idea to remind attendees to remove their name badges when they leave a venue, to maintain their anonymity once they are outside of an event.

Consider implementing a buddy system: it's a good way to break the ice and can help people who may feel nervous or vulnerable to participate in the event more fully. A simple way to do this is to ask the emcee at the start of the event to tell everyone to look around and take a minute to find a "buddy" they can exchange contact information with. That way they will have someone to reach out to in addition to the event organizers if they have an issue or feel unwell.

Also, at the start of the event, take the time to explain the organization's code of conduct to all attendees, venue staff, and suppliers and remind everyone that any abusive or harassing language or actions will not be tolerated. Make sure there is a documentation system in place to capture and address any issues and clearly identify the on-site contacts that people can go to with

Consider implementing a buddy system: it's a good way to break the ice and can help people who may feel nervous or vulnerable to participate in the event more fully.

concerns (ideally the on-site support team should represent your audience's diversity).

Empowering attendees to protect themselves at meetings and events is a critical step in making sure everyone feels safe, according to Carolyn Pearson, CEO of Maiden Voyage, a consulting firm based in the UK. "I've spoken to women who have been harassed by colleagues at events," she explains. "One woman told me she felt she had no one to talk to about the problem so she went home early."

Be sure to act on any issues that are identified during the event as quickly as possible and communicate with the originator of the complaint what has been done and how processes will change to avoid it happening again in the future. Share information and feedback with on-site staff while it's still fresh in everyone's minds.

10 Steps You Can Take Now

The world has come a long way in becoming more accessible and inclusive, and there are basic accommodations that can be made to support that now. Consider the following ideas:

1. Offer closed captioning for every presentation.
2. Confirm that presentations and signage are legible to people who are color-blind.
3. Ask speakers to use inclusive language (for example, say "Hello Everybody" rather than "Hello Ladies and Gentlemen") and consider providing a brief description of themselves if there are attendees who are visually impaired (for example, "Good morning, my name is Sherry Jones and I am a tall Black woman with short grey hair").
4. Ask emcees to repeat questions posed by audience members during Q&As for those who may be hearing impaired.
5. Provide a trigger warning before videos or flashing lights for those prone to seizures.
6. Program appropriate breaks during the day, ones that are long enough that people can step away and recharge.
7. Make sure to offer daytime networking events in addition to evening and off-site networking events – be sensitive to the introverts and attendees who may not feel safe leaving the venue for whatever reason.
8. Provide quiet rooms for religious, breastfeeding, or mental health needs.
9. Make sure all food and beverage offerings are well-marked so that people know what they're being offered.
10. Always offer a non-alcoholic option in addition to beer, wine, or cocktails and try to make it look special too – for example, if there's a champagne reception, offer a sparkling tonic or another fancy drink option in a champagne glass. Not everyone wants to broadcast that they are not drinking alcohol.

Conclusion

Diversity and inclusivity can refer to many different things and it can be overwhelming to consider all the options. By looking through the lens of attendee safety, you can uncover opportunities to empower your meetings and events attendees, presenters, and staff to feel confident that they will be welcome at your event.

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Case Study

Travel and Meetings
Management:

A One-Partner Approach



As organizations become more proactive about understanding the value of their meetings programs, it is more important than ever to implement formal meeting management policies that cover the what, why, and how of meeting planning.

Working with an integrated travel and meetings management company can help. In addition, having specific policy language that explains an organization's approval process, sustainability targets, approved suppliers, and ROI metrics, for example, is one way to make sure that meeting planners across a global organization are working toward the same goals. The following case study illustrates how an American Express Global Business Travel (Amex GBT) client was able to gain more visibility into their meeting spend.

The Situation

A global healthcare company had a successful travel program through Amex GBT. However, they were finding that managing meetings didn't run as smoothly as travel. They had over 50 different meeting planning companies to work with globally. Approvals and logistics needed to be streamlined and outsourced agencies needed to be able to work with peer agencies. The most challenging issue was oversight of meetings spend. Since many teams didn't have the ability to manage all of their suppliers, it was difficult to tell how much was being spent on meetings worldwide.

The Solution

The company wanted to strategize meetings more holistically. Amex GBT's flexibility and global reach had been serving them well when it came to travel. Many managers thought, "why not expand our relationship and have Amex GBT take on our meetings program, too?" The integration of travel and meetings through one management partner would allow for easier reporting, contracting, and service-level agreements with agencies. The teams wanted consistency throughout each region so that everyone in the company worked through the same structure. Adding on the services of Amex GBT's Meetings & Events team was the likeliest solution to their needs.

Since a holistic meetings strategy was key, they decided it was best to utilize the services of Amex Global Business Consulting (GBC) as well. Having consultants to help with strategy let them offload a lot of work they would typically do themselves

to optimize air and hotel spend. Meeting their corporate sustainability goals was another priority. Considering that GBC has experience and proficiency in this area, it made sense to partner with GBC.

The Outcome

Now that the healthcare company has integrated their travel and meetings management through one partner – Amex GBT – the teams find they're getting the holistic experience they were after. According to the head of travel:

Since many teams didn't have the ability to manage all of their suppliers, it was difficult to tell how much was being spent on meetings worldwide.

"Everything goes back to account management. If we have issues, we have one point of contact to get it fixed. Escalation cascades to all three areas: travel, meetings and events, and consulting without any need for third-party approval. Amex GBT has all of the data to aggregate and apply where necessary."

While the company is still in the early stages of the travel and meetings integration, the teams have already noticed they have:



- Improved visibility of meetings spend.
- The potential to optimize visibility of group travel and hotel spend.
- Oversight of travel and meetings globally through regional leads.
- An effective way to reach their sustainability goals, thanks to Amex GBT's Green Marketplace.

The company's head of travel, meetings, and expense noted, "Our needs are heard and our concerns are resolved when expressed." This senior leader feels other large companies with similar complex needs can benefit from Amex

GBT's breadth and scope. The leader also recommends Amex GBT to companies with less challenging programs that need a streamlined end-to-end management solution.

Adding on meetings services and consulting was clearly the right move

There are clear efficiencies in working with one partner for travel and meetings management. Saving money is an obvious benefit, in addition to offering employees and planners an easier way to book travel and meetings. In the case of this client, consolidating their travel and meetings management programs with one provider also is helping them speed up progress towards sustainability goals.

Data Tables

This year's data tables consist of global responses to 40 of the most timely and relevant survey questions.

Methodology

To develop this 2023 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 were conducted of a total of 502 meeting professionals, broken down by region as follows: North America (167), Europe (112), Latin America (105), and Asia Pacific (118). A survey of leading hotel (51) and airline (27) 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.

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TRENDS

Level of Optimism

Percent of respondents

The majority of meeting professionals globally are optimistic about the health of the meetings and events industry in 2023 – particularly in Latin America, where 90% of respondents rated themselves an 8 or higher on a scale of 1 to 10.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
1- Very Discouraged	0%	0%	0%	0%
2	0%	0%	1%	0%
3 - Discouraged	0%	1%	0%	2%
4	1%	1%	0%	4%
5 – Neither discouraged nor optimistic	2%	3%	0%	4%
6	8%	4%	3%	3%
7 - Optimistic	17%	17%	7%	12%
8	33%	40%	25%	33%
9	16%	18%	29%	19%
10 - Very Optimistic	23%	17%	36%	22%
8 to 10	72%	75%	90%	74%

Workforce Location

Percent of respondents

Half of survey respondents reported that their offices were fully open. North American respondents reported the highest percentage of completely remote workforces.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Fully open	52%	54%	50%	52%
Partially open (Hybrid)	33%	42%	44%	46%
Closed (Completely remote)	15%	4%	6%	2%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Attendee Levels

Percent of respondents

Two-thirds of respondents expect attendee numbers to revert back to pre-pandemic levels within the next 1 to 2 years.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Yes, in the near future (1 to 2 years)	63%	69%	78%	61%
Yes, in the semi-near future (3 to 5 years)	25%	19%	16%	36%
Yes, in the distant future (More than 5 years)	3%	2%	2%	2%
No, not expected to return to pre-pandemic levels	7%	11%	3%	2%
Other: please specify	2%	0%	1%	0%

Top Factors Influencing Meeting Location

Percent of respondents

The top two factors that influence meeting location selection globally are 1) specific location type needed, and 2) ease of air lift and transportation. There are regional variations, however, with Asia Pacific respondents citing security concerns as a major factor, and global hoteliers choosing ability to host hybrid meetings.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Size of meeting space to accommodate social distancing	28%	17%	30%	19%	16%
Food and beverage protocol	8%	12%	12%	5%	18%
Guest temperature and symptom screening	2%	5%	10%	13%	8%
Safety concerns related to economic/political instability	15%	21%	12%	28%	10%
Currency/exchange rate	3%	5%	4%	3%	6%
Online reviews	4%	5%	7%	10%	14%
Perceptions around "resort" destination for meetings	7%	7%	10%	8%	6%
Participation in company or organization's preferred supplier program	17%	16%	7%	10%	6%
Ease of air lift/transportation to location for attendees	24%	21%	28%	29%	18%
Client directive based on past experience	16%	14%	6%	11%	10%
Repeat destination for meeting	11%	11%	2%	15%	8%
Specific location type needed – airport, near training facility, near customer location, etc.	35%	26%	26%	18%	24%
Ability to host hybrid meetings (e.g., Wi-Fi bandwidth, skilled A/V staff)	14%	21%	23%	12%	20%
GBAC STAR Accreditation	1%	0%	4%	6%	4%
Disinfection protocols	7%	8%	19%	8%	14%
Other: please specify	3%	4%	0%	0%	8%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Virtual Challenges

Percent of respondents

Technical issues and lack of engagement were the top two challenges faced by respondents conducting virtual meetings and events in 2022. Twenty-nine percent of respondents in Asia Pacific said the event did not achieve meeting objectives, while one-quarter of respondents in Europe and Latin America also cited security concerns.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Lack of knowledge/experience with virtual meetings and the technology	14%	27%	18%	24%
Limited budget	18%	15%	19%	15%
Poor attendance	16%	14%	22%	17%
Technical issues	40%	39%	45%	25%
Lack of engagement	31%	23%	8%	36%
Corporate mandates related to meetings	9%	13%	9%	14%
Security concerns	16%	24%	24%	20%
Below average learning and retention	11%	9%	12%	12%
Did not achieve meeting's objective (to inform, shift behavior, motivate, connect, etc.)	10%	9%	13%	29%
Other: please specify	1%	2%	1%	0%
Not applicable – I did not plan any virtual-only events	13%	9%	6%	2%

Encouraging Engagement

Percent of respondents

Entertainment and food and beverage experiences continue to be the top two kinds of programming planners use to engage attendees.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Food & beverage experiences (e.g., wine tasting, cooking class, etc.)	36%	39%	48%	25%
Wellness activities (e.g., yoga, mindfulness, etc.)	14%	11%	10%	12%
Entertainment (e.g., live music, comedy, other performances, polls, event app activity feed, games, etc.)	42%	38%	42%	63%
Other: please specify	3%	1%	1%	0%
Don't know	5%	11%	0%	1%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Technology Usage

Percent of respondents

Most respondents globally say they are optimistic about their ability to incorporate technology. Respondents in Latin America and Asia Pacific are especially optimistic.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
1- Very Discouraged	0%	0%	0%	0%
2	0%	0%	0%	1%
3	0%	0%	0%	0%
4	1%	1%	1%	0%
5 – Neither discouraged nor optimistic	11%	9%	2%	6%
6	10%	13%	5%	8%
7	17%	18%	10%	14%
8	28%	33%	22%	33%
9	17%	15%	20%	27%
10 - Very Optimistic	16%	12%	40%	11%
8 to 10	61%	60%	82%	71%

Sustainability

Percent of respondents

Eighty percent of respondents globally say their organization considers sustainability when planning meetings and events. Latin America and Asia Pacific lead the pack.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Yes	71%	78%	86%	86%
No	22%	13%	9%	13%
Don't know	7%	9%	6%	1%

Defined Sustainable Meeting Program Strategy

Percent of respondents

Of respondents whose organizations consider sustainability when planning meetings and events, three-quarters have a defined sustainable meeting strategy in place.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Yes	70%	66%	84%	83%
No	18%	24%	12%	12%
Don't know	12%	10%	3%	5%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Sustainable Practices

Percent of respondents

Meeting planners will use a variety of practices to help meet sustainability goals, including minimizing paper usage (58%), applying energy-saving and waste-reduction measures (51%), and booking suppliers that have an active green policy or certification (44%).

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Booking suppliers (air, hotel, ground transportation, F&B) with an active green policy or certificate in place	43%	45%	41%	47%
Encouraging attendees to use public transportation, carpool, rideshare, walk when possible	28%	41%	33%	32%
Recommending a location with minimal amounts of travel for attendees	32%	46%	40%	32%
Applying energy-saving and waste reduction measures (separation of waste; LED lighting, recycling programs)	39%	53%	55%	58%
Minimizing paper usage (e.g. by using mobile apps, QR codes, electronic gift cards etc.)	59%	62%	57%	60%
Post event CO2 calculation	18%	28%	24%	20%
Other: please specify	1%	1%	0%	0%
Don't know	15%	7%	3%	1%

Sustainability Impacts

Percent of respondents

Planners say minimizing paper usage is the most impactful sustainable practice; one-quarter of North Americans said recommending locations with minimal travel and one-fifth of Europeans said booking suppliers with green policies and certification have the most impact.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Booking suppliers (air, hotel, ground transportation, F&B) with an active green policy or certificate in place	16%	21%	18%	18%
Encouraging attendees to use public transportation, carpool, rideshare, walk when possible	10%	14%	9%	8%
Recommending a location with minimal amounts of travel for attendees	25%	18%	11%	18%
Applying energy-saving and waste reduction measures (separation of waste; LED lighting, recycling programs)	17%	21%	28%	14%
Minimizing paper usage (e.g. by using mobile apps, QR codes, electronic gift cards etc.)	19%	13%	28%	33%
Post event CO2 calculation	7%	5%	6%	9%
Other: please specify	0%	1%	0%	0%
Don't know	7%	5%	1%	0%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Striving to Incorporate DE&I

Percent of respondents

Eighty-seven percent of respondents globally say their organizations or clients actively strive to incorporate diversity, equity and inclusion into their meetings and events.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Yes	81%	82%	96%	92%
No	8%	6%	3%	6%
Don't know	11%	12%	1%	3%

Incorporating Diversity and Inclusion

Percent of respondents

Using diverse and minority-owned suppliers is the number one way globally that organizations incorporate DE&I into their meeting programs; regionally, respondents in Europe say they provide an option to attend virtually, and respondents in Latin America say they focus on accessibility.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Providing an option to attend the meeting or event virtually	24%	39%	25%	28%
Focusing on accessibility (wheelchair-friendly venue and activities)	22%	28%	34%	22%
Building in alternative forms of communication (e.g., sign language, subtitles, translator, etc.)	14%	15%	33%	19%
Using diverse/minority-owned suppliers (hotel, F&B, DMC, ground transportation, audiovisual (AV)/production)	29%	24%	28%	37%
Choosing diverse/minority speakers, emcees, or entertainment	40%	21%	16%	30%
Within meeting or event content (topics and presentations)	16%	18%	22%	19%
Through a charitable giving element of the meeting or event	17%	17%	10%	18%
Including gender pronoun preferences in meeting registration sites and virtual/physical name badges (e.g., she/her, he/him/his, they/them etc.)	19%	18%	24%	20%
Other: please specify	0%	0%	0%	0%
Don't know	6%	4%	1%	0%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Diversity Spending

Percent of respondents

Choosing diverse food and beverage suppliers was the top choice for respondents when asked where they can shift spend to support DE&I.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Hotel	20%	23%	26%	18%
Food and beverage/catering/restaurant	31%	29%	25%	31%
Destination Management Company (DMC)	17%	13%	23%	25%
Ground	4%	5%	8%	8%
Audiovisual (AV)/production	8%	11%	16%	17%
Don't know	21%	19%	3%	2%

Career Options for Meetings and Events Professionals

Percent of respondents

Professionals in North America, Europe and Asia Pacific have considerably better opinions regarding their career options this year compared to last year – only 42% of Europeans in 2021 rated their career options an 8 or higher on a scale of 1 to 10, versus 58% in 2022. Respondents in Latin America continue to be very optimistic.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
1- Poor	0%	0%	0%	0%
2	0%	0%	0%	0%
3	1%	1%	1%	0%
4	1%	4%	0%	2%
5 – Neither poor nor excellent	8%	10%	1%	8%
6	7%	7%	4%	7%
7	19%	20%	13%	15%
8	26%	24%	29%	32%
9	19%	20%	23%	26%
10 - Excellent	20%	14%	30%	10%
8 to 10	65%	58%	82%	68%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

MEETINGS ACTIVITY

Meeting Format

Percent of meetings

North America leads the regions in the percentage of in-person meetings and events predicted for 2023; Asia Pacific respondents have the highest expected percentage of virtual meetings.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
In-Person only	61.63	53.04	48.63	37.08
Hybrid (virtual attendees and in-person attendees)	18.66	20.91	24.54	25.36
Hybrid Multi-Hub (two or more in-person meetings connected via a virtual platform)	9.68	12.37	16.20	21.76
Virtual-only	10.04	13.68	10.63	15.81

In-Person Meeting Frequency

2023 vs. 2022

All meeting types are expected to increase in person in 2023, when compared to 2022.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	4.62%	4.11%	4.29%	2.36%
Product Launch (Internal/External)	3.74%	3.39%	3.51%	2.61%
Conference/Tradeshaw	3.62%	3.73%	2.63%	3.02%
Senior Leadership Meeting/Board Meeting	4.34%	4.32%	3.88%	2.92%
Client/Customer Advisory Board	4.60%	4.13%	4.83%	2.81%
Incentive/Special Event	4.01%	3.89%	4.37%	2.53%
Small/Simple Meetings	4.72%	4.65%	4.30%	3.19%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Virtual and Hybrid Meeting Frequency

2023 vs. 2022

North American and European respondents are prioritizing in-person meetings so expect a decrease in virtual and hybrid for most meeting type. Asia Pacific expects increases across the board for virtual and hybrid meeting formats, ranging from 1.3% to 2.9%.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	-0.15%	0.51%	-0.02%	2.21%
Product Launch (Internal/External)	-0.92%	-0.51%	0.91%	1.32%
Conference/Tradeshaw	-0.45%	-0.19%	0.37%	1.63%
Senior Leadership Meeting/Board Meeting	-0.73%	0.52%	1.60%	2.40%
Client/Customer Advisory Board	0.40%	0.76%	2.53%	2.90%
Incentive/Special Event	-0.39%	0.41%	1.03%	1.87%
Small/Simple Meetings	0.50%	1.10%	1.99%	2.63%

Internal Meeting Characteristics

Percent of meetings

Note: this is a new question in the Forecast survey. More than half of internal meetings in North America will include overnight accommodations; globally, 27% are expected to include international air travel for attendees.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Held on your corporate property	30%	26%	39%	33%
Held in a different city than your corporate office	46%	35%	40%	36%
Held at a hotel	51%	43%	47%	43%
Held at a non-hotel venue	24%	27%	35%	31%
Include overnight accommodations for attendees	54%	40%	42%	41%
Include domestic air travel for attendees	45%	33%	39%	36%
Include international air travel for attendees	27%	22%	30%	30%
Include social activities/networking	46%	33%	39%	36%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Virtual and Hybrid Meeting Characteristics

Percent of meetings

Web conferencing platforms will be used in almost half of virtual and hybrid meetings (44% globally); one-third will be livestreamed and use a full-service production company.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Use web conferencing platforms such as Zoom, Teams, WebEx, etc.	48.17%	41.70%	47.80%	41.88%
Use a webinar platform with the audience muted	32.14%	26.89%	39.72%	36.11%
Be livestreamed and will require a full-service agency	28.83%	28.76%	40.23%	37.07%
Be a virtual conference with a supplier showcase or tradeshow	25.61%	22.35%	39.16%	34.47%
Use a mobile event app either on its own or in addition to other event technology	31.17%	27.70%	37.35%	33.30%

Factors That Influence In-Person Planning

Percent of respondents

Duty of care is still an important consideration for planners but favorable rates, flexible terms and supplier flexibility are more top of mind for 2023.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Confidence in duty-of-care components for attendee health and safety	30%	33%	38%	45%
Favorable rates and reduced fees	51%	38%	48%	28%
Favorable/flexible cancellation and attrition terms	56%	53%	25%	39%
Limited time special offers (including free gifts and add-ons such as dinner vouchers, VIP lounge access, etc.)	16%	13%	22%	33%
Supplier flexibility to adapt to the customers' meetings and events requirements	39%	46%	53%	46%
Other: please specify	2%	3%	0%	0%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Factors That Influence Changes in Meeting Spend

Percent of respondents

An organization's growth plan is the number one factor globally that influences a change in meeting spend.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
New product launches	29%	42%	45%	36%
Revenue changes	53%	34%	47%	47%
Macroeconomic changes	25%	34%	37%	53%
Growth plan	51%	49%	48%	55%
Other: please specify	2%	1%	0%	0%
Don't know	16%	13%	2%	2%

Number of Attendees

2023 vs. 2022

Attendee numbers are expected to increase across the board, in every region, from a high of 5.71% for product launches in Latin America, to a low of 2.5% for conferences in Asia Pacific.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	4.97%	4.17%	5.42%	3.41%
Product Launch (Internal/External)	4.46%	3.82%	5.71%	3.06%
Conference/Tradeshow	3.98%	3.03%	5.38%	2.50%
Senior Leadership Meeting/Board Meeting	4.42%	3.23%	5.49%	3.10%
Client/Customer Advisory Board	5.01%	3.78%	5.08%	2.59%
Incentive/Special Event	4.09%	2.84%	5.33%	2.71%
Small/Simple Meetings	4.40%	4.07%	5.88%	2.61%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Days per Meeting

Number of days

The average meeting length ranges from 1.17 days in Europe for small and simple meetings to 2.97 days in North America for conferences.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	2.34	2.03	2.31	2.75
Product Launch (Internal/External)	2.43	1.99	2.77	2.43
Conference/Tradeshow	2.97	2.46	2.94	2.72
Senior Leadership Meeting/Board Meeting	2.03	1.98	2.18	2.57
Client/Customer Advisory Board	1.91	1.69	2.11	2.55
Incentive/Special Event	2.94	2.56	2.77	2.71
Small/Simple Meetings	1.51	1.17	1.57	1.81

Hours per Meeting

Number of hours

Small and simple meetings are the shortest type of meeting for the virtual and hybrid format, with 2.8 hours being the global average.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	4.1	4.5	4.2	5.1
Product Launch (Internal/External)	4.9	5.0	4.9	4.5
Conference/Tradeshow	7.2	7.8	5.0	5.7
Senior Leadership Meeting/Board Meeting	4.0	5.0	4.2	5.2
Client/Customer Advisory Board	3.4	3.8	3.5	4.7
Incentive/Special Event	4.7	6.0	5.1	4.4
Small/Simple Meetings	2.7	3.2	2.2	3.1

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Overall Meeting Spend

Percent of respondents

Approximately two-thirds of respondents expect their overall meeting spend to increase in 2023; 12% of respondents in both North America and Europe predict a significant increase of 11% or more.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Significantly Decreasing (11%+)	1%	3%	3%	2%	8%
Decreasing (6%-10%)	9%	8%	7%	4%	14%
Slightly Decreasing (1%-5%)	7%	9%	12%	10%	16%
Staying the same	19%	15%	16%	17%	12%
Slightly Increasing (1%-5%)	25%	30%	32%	44%	24%
Increasing (6%-10%)	28%	24%	23%	17%	16%
Significantly Increasing (11%+)	12%	12%	8%	6%	8%

Cost Area Cut First to Reduce Budget

(and maintain customer experience)

Percent of respondents

Off-site optional activities and number of nights are the first areas to be cut to reduce budgets; respondents in Asia Pacific also look to reduce on-site travel staff at much higher levels than other regions.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Room drops	10%	9%	6%	3%
Food & beverage	10%	9%	6%	8%
Onsite travel staff	2%	4%	5%	18%
Off-site evening events	17%	16%	15%	18%
Communication	1%	5%	5%	4%
Use of Destination Management Company (DMC)	9%	4%	8%	14%
Ground transportation	4%	4%	6%	3%
Off-site optional activities	21%	23%	31%	18%
Number of nights	23%	25%	17%	15%
Other: please specify	2%	1%	2%	0%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Preferred Area of Investment (if budgets increased by 10%)

Percent of respondents

Improving the on-site experience and increasing the use of technology are the top two areas planners would use increased budgets.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Increase number of meetings	7%	12%	12%	14%
Increase number of attendees at meetings	14%	11%	16%	12%
Increase number of days for meetings	5%	10%	7%	7%
Improve onsite experience	41%	31%	20%	31%
Improve content delivery	7%	13%	12%	10%
Increase use of technology	19%	18%	30%	27%
Other: please specify	1%	1%	1%	0%
Don't know	6%	4%	1%	0%

Total Cost per Attendee

US dollars

Incentives and special events are expected to have the highest cost per attendee in every region except Asia Pacific, where product launches are expected to come in at the top.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	\$553.85	\$554.12	\$662.37	\$710.87
Product Launch (Internal/External)	\$818.38	\$793.48	\$844.44	\$873.89
Conference/Tradeshaw	\$856.56	\$826.92	\$851.12	\$784.78
Senior Leadership Meeting/Board Meeting	\$789.06	\$760.31	\$734.54	\$846.49
Client/Customer Advisory Board	\$714.29	\$669.54	\$676.32	\$767.86
Incentive/Special Event	\$880.95	\$880.68	\$855.26	\$836.36
Small/Simple Meetings	\$450.00	\$427.08	\$502.58	\$565.32

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Change in Total Cost per Attendee

2023 vs. 2022

Globally, attendee costs are expected to increase anywhere from 1.5% for small and simple meetings to 3.0% for conferences and tradeshows.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Internal Team Meeting/Training	2.4%	2.3%	1.9%	2.6%
Product Launch (Internal/External)	2.7%	3.1%	3.4%	2.2%
Conference/Tradeshow	3.0%	3.3%	3.5%	2.2%
Senior Leadership Meeting/Board Meeting	3.1%	3.1%	2.2%	1.9%
Client/Customer Advisory Board	2.8%	2.6%	1.8%	2.1%
Incentive/Special Event	2.8%	3.5%	2.6%	1.8%
Small/Simple Meetings	2.0%	1.4%	1.6%	1.2%

MEETINGS MANAGEMENT

Meeting Management Components Adoption

Percent of respondents

Approximately two-thirds of respondents say their organization has adopted the following meeting management components.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Formal policy for meetings	69%	64%	62%	67%
Centralized staff to support meeting planning and execution	70%	65%	68%	67%
Approval process for meetings	76%	71%	76%	66%
Specific technology or software for managing meetings	74%	71%	74%	68%
Centralized contracting with preferred vendors	71%	69%	71%	67%
Inclusion of virtual and hybrid meetings	64%	64%	68%	67%
Inclusion of small/simple meetings	70%	65%	74%	65%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Explicit Policy Language

Percent of respondents

Safety and security remains the component that most respondents (59%) say is explicitly referred to in their organization's meeting management policy.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Meetings ROI metrics	19%	17%	20%	22%
Global expansion/standardization of meetings and events program	25%	27%	26%	30%
Use of third-party meeting planners	32%	27%	18%	25%
Payment methods and processes associated with meeting/events goods and services	53%	39%	37%	40%
Use of meetings planning technology	44%	47%	49%	31%
Procurement of meetings/events goods and services	54%	31%	31%	28%
Social media acceptable use	35%	23%	43%	31%
Use of preferred hotel/air/transportation suppliers	49%	46%	41%	32%
Approval process	60%	39%	43%	42%
Safety and security	68%	59%	60%	45%
Health and wellness	40%	39%	39%	33%
Use of Sharing Economy Suppliers (e.g. Airbnb, Uber, Lyft)	23%	10%	24%	24%
Virtual and hybrid meetings specific policies	32%	31%	38%	35%
Small/simple meetings	29%	31%	45%	31%
Other: please specify	2%	2%	0%	0%
None of the above	5%	5%	0%	3%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

HOTELS, AIR, AND MEETING SPACE

Average Group Rates

Percent of respondents

North American respondents predict the biggest increase in hotel and group air rates for 2023, at 7.37% and 7.78% respectively. Global Hoteliers and Air Suppliers predict increases that are somewhere in the middle of the other regions, at 3.48% and 4.04% respectively.

Average Group Rate for Hotels

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
	7.37%	4.78%	3.96%	2.46%	3.48%

Average Group Rate for Air

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC	AIR SUPPLIERS
	7.78%	5.20%	4.22%	3.13%	4.04%

Group Air Management

Percent of respondents

Globally, more than a third of respondents' meetings will include group air management or booking. Asia Pacific respondents are the most likely to use group air management for bookings, at 43.78%.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Percentage of meetings	36.36%	33.62%	40.47%	43.78%

Value of Group Air Providers

Percent of respondents

Respondents value better rates above all other benefits from their group air provider; crisis management remains very important.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Favorable group air rates	21%	23%	43%	24%
Duty of care	12%	9%	3%	13%
Manifest management – (e.g., flexible on name changes)	11%	12%	9%	14%
Crisis management – (e.g., managing delegates during flight cancellation, closure of air space, etc.)	15%	24%	13%	23%
Mitigation of cancellation / change fees	10%	12%	11%	14%
Online booking tool	10%	7%	14%	12%
Other: please specify	2%	0%	0%	0%
Don't know	8%	6%	1%	1%
Not applicable	11%	7%	6%	1%

Group Air Resources

Percent of respondents

Respondents who book group air are most likely to also use travel management company services followed by online booking tools.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Direct arrangements with airline	20%	27%	37%	42%
Internal group air specialist	32%	25%	36%	38%
Meetings management supplier	18%	30%	35%	44%
Travel management company	55%	49%	40%	49%
Online booking tool	44%	32%	40%	44%
Other: please specify	1%	1%	0%	0%
Not applicable	5%	1%	0%	1%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Group Air Online Booking

Percent of respondents

Half of respondents in North America book their group air via an online tool.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
	51.32%	32.97%	44.66%	44.48%

Influence of Group Air Rates

Percent of respondents

Group air rates are very or extremely influential on destination choices for 56% of respondents in Latin America, versus 29% of respondents in Europe.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC
Not at all influential	8%	7%	3%	5%
Slightly influential	12%	17%	11%	21%
Moderately influential	34%	33%	24%	35%
Very influential	25%	22%	39%	26%
Extremely influential	8%	7%	17%	10%
Don't know	9%	5%	1%	2%
Not applicable	4%	8%	4%	1%

Room and Meeting Space Availability

Year over Year

Space availability is expected to be tight in North America and Europe in 2023, easing in 2024. Latin America and Asia Pacific are predicting increases in both years.

	NORTH AMERICA	EUROPE	LATIN AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
2023 Room Availability	-0.58%	0.28%	2.07%	1.66%	-0.27%
2023 Meeting Space Availability	-0.14%	0.65%	3.12%	2.60%	*
2024 Room Availability	1.04%	2.65%	3.57%	3.35%	1.08%
2024 Meeting Space Availability	1.46%	2.91%	3.37%	3.60%	*

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.

Key Trends in the Hotel Industry

Weighted ranking

Global Hoteliers say that more boutique hotel bookings, reduced staff to respond to RFPs, and reductions in group program points are all key trends to watch.

	GLOBAL HOTELIERS
Increased use of boutique hotels	24%
Erosion of group program points	23%
Slower RFP response rates due to reduced hotel staff	22%
Changes in contractual terms and conditions	21%
Increased investment in meetings technology	21%
GBAC STAR Accreditation	19%
Re-flagging of hotel properties	18%
More challenging contract negotiations	18%
Change in key contacts from customer organizations	18%
Disinfection and social distancing protocols	17%

Source: North American, European, Latin American, and Asian Pacific Surveys from American Express Meetings & Events, 2022.



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¹ Meetings Insights, Meetings & Events Reporting Platform, Sept. 2022



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