



2020 future trends

in meetings and events

Delve into the data and trends with expert analysis to amplify your M&E program





A growing industry

Globally, the meetings and events industry is estimated at \$840 billion, and growing. It is a time of rapid innovation in technology, economic investment, and advances in sustainability. While we see some signs of economic uncertainty around some major European markets, causing a contracting of lead times. The potential instability caused by the UK's exit from the EU is heightening as the divorce date approaches at the end of October. However, overall there is steady growth.

The bigger markets such as the US, Europe and Asia are driving most of that demand, and it is expected

emerging markets, such as India and China, will see more dramatic growth in the years to come as they continue to be brought into centrally-managed programs, especially with populations motivated by travel, events and training.

"With increasing recognition of the crucial role that meetings and events play in the success of a business, attention is being paid to overall spend," says Derek Sharp, Senior Vice President and Managing Director, CWT Meetings & Events. "We expect significant growth in the next five to ten years in supporting multinational companies needing services in those markets which have a huge untapped potential," he forecasts.

“ The overall growth trajectory in the meetings and events industry is rising at a steady 8% rate, which is encouraging. ”

Derek Sharp, Senior Vice President and Managing Director, CWT Meetings & Events

Ian Cummings, Vice President, EMEA, CWT Meetings & Events, adds that companies have realized the way to cut through all the social media noise is to hold face-to-face events. "We see approximately 25-30% of overall marketing budgets being spent on live events," he says.

Digitalization

CWT's data shows a rapid expansion in the numbers of event websites being created, **up 52% year-over-year**, while the number of mobile apps created has more than doubled since 2017. "The meetings and events business will look very different in three years with huge changes, particularly around digitalization," adds Saskia Gentil, Vice President, Global Sales, CWT Meetings & Events.



The opportunities around machine learning and artificial intelligence abound, with businesses in the wider marketing space already taking advantage of the burgeoning technology to create content. Combining creativity with machine learning could allow for more effective events content, while the rollout of 5G means faster connections for attendees.

Responsible business

A key trend for 2020 is environmental, economic and social sustainability. One of the key trends for 2020 is sustainability, from an environmental, economic, and social perspective. While images of the Amazon rainforest fires have brought sustainability issues to the fore, in 2020 the focus is on extending the concept to cover diversity and inclusion, modern day slavery, and even data privacy.

"There is a trend towards the idea that events should do more than just educate or have a



business development opportunity, but also to create good for communities globally," says Jessie States, Director of the MPI Academy at Meeting Professionals International. "It is more than just being an add-on, it is about the entire experience. Big brands are making a statement about what they stand for, and ultimately it is the consumer demanding it."

Global pricing

Average air and hotels prices are projected to rise slightly in the coming year.

Air prices are expected to increase by 1.2% (in USD) on average worldwide, though regional variations show that prices will vary between -1.6% and 2.3% across Asia Pacific, the Middle East & Africa, North America, and Latin America.

Meanwhile, Europe will see prices remain steady, with a small 0.5% gain in Western Europe, while Eastern Europe is expected to experience a 0.2%

dip. In Latin America and the Caribbean, however, air prices are forecast to fall by 1.6%, mainly driven by contraction in business, continental and domestic rates.

Hotel accommodation is experiencing a similarly small, but notable, expansion in pricing of 1.3% (in USD) on average across the globe.

Reflecting conditions in air travel, the greatest price increases will be felt in the Middle East, Africa, and North America. Overall, only Latin America and the

Caribbean are forecast to see a regional price reduction, with prices across Europe increasing by an average 0.7%.

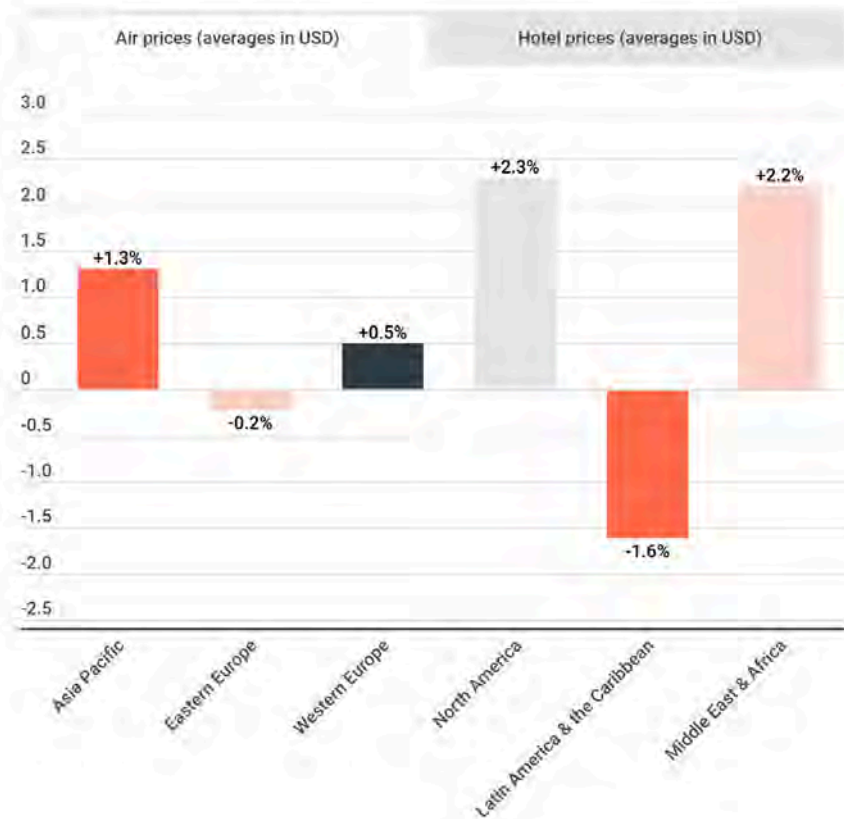
“ The dismantling of the commission model that took place in the airline world is happening in the hotel space, and we have to be ready for a world where commission goes to zero. ”

Derek Sharp, Senior Vice President and Managing Director,
CWT Meetings & Events





Global 2020 air and hotel price projections



Source: CWT – GBTA – Rockport Global Travel Price Forecast

Safety and security is a top priority

Meetings arrangers are taking security and safety more seriously as an issue but this isn't stopping them from being more adventurous with their choice of destinations. This is having an impact on how they manage safety and security

Aditya Luthra, Security Consulting Director, Asia, at International SOS, says, "More events are going to more remote tier two and three cities where access to medical care may be subpar and sub-standard, and the security environment could be more volatile."

To prepare for these risks, medical and security risk services firms, such as International SOS, provide clients with pre-travel risk assessments to decide if the destination is suitable to host the event. This covers not just the event venue and offsite activities venues, but also "vicinity" risks, such as any crime "hotspots" near the hotel that attendees should be advised about, or any risks associated with traveling between different event venues.

"Every location is assigned a risk rating – from low risk to extreme risk," explains Luthra. "This covers both medical and security issues. It's important to have access to accurate and timely information and advice, and also having an accurate understanding of the potential exposure to the event."

“ There is an increased focus on safety, security and risk. Event organizers want to ensure attendees are protected at meetings. If they are bringing a large group of people to a destination they want to know what their exposure to safety and security risks are. Clients are more attuned to these risks than before. They are making sure they have contingency plans in place. ”

Sam Lay, Senior Director, Asia Pacific, CWT Meetings & Events, Asia Pacific



Top 3 causes of modified itineraries:

1: Security threats



2: Country risk ratings



3: Natural disasters and extreme weather events



Increased adoption of security measures by companies:



included travel risk assessment in travel approval process (up 5 percentage points year-over-year)

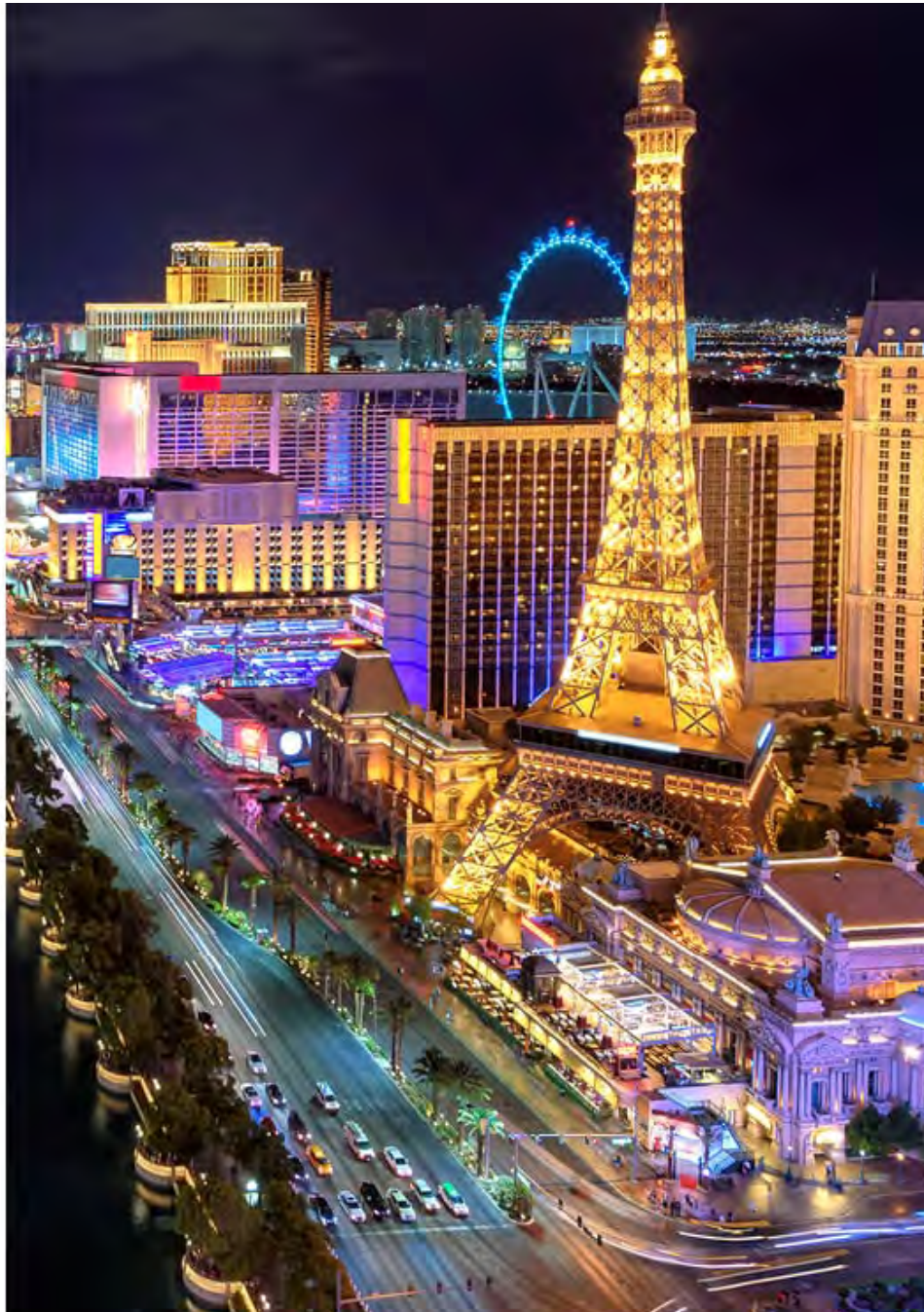


implemented travel safety and security training (up 6 points)



updated their travel risk policy to be more inclusive of modern workforce needs (up 5 points)

North America



Demand still rising

Overall demand for meetings and events in North America is continuing to increase, but the pace of growth has fallen.

“ More than ever, political events have a direct impact on more than ever on companies’ quarterly and annual outlooks. Some industry segments are pulling back, such as agriculture because of the trade situation, and are being a bit more cautious. ”

Tony Wagner, Vice President, Americas & South Pacific Regions at CWT Meetings & Events

Despite these headwinds, the US economy continues to be strong with event sizes rising, including many companies in the tech sector that have moved to consolidate their smaller meetings into larger events.



Rebalancing act for buyers and suppliers

In recent years, buyers have been on the back foot in their negotiations with suppliers due to tight inventories.

But there are signs this is changing thanks to new supply in the US. This can potentially give clients more leverage in 2020 to secure improved rates from hotels and venues, which can relieve the

feeling that event owners must rush to source.

Worries about the global economy and potential trade wars may also be having an impact on booking times.

“Suppliers are seeing much shorter booking windows with small groups (of up to 50 people) down to 30 days. Larger events previously being booked six months in advance are now seeing booking windows of three months.”

Nathan Brooks, Global Lead, Supplier Management, CWT Meetings & Events

Secondary cities in focus

Destinations such as Nashville and Austin are rising in popularity thanks to new hotels, venues and a strong cultural appeal.

Rates continue to rise in Seattle due to strong demand and tight capacity, with the city fast becoming “the new San Francisco.”

Meanwhile, Austin has also seen a material increase in properties that cater to the upscale and the luxury market place.

“Nashville is really in demand because of new properties as well as a vibrant entertainment scene –it’s built for events.”

Tony Wagner, Vice President, Americas & South Pacific Regions, CWT Meetings & Events



Nashville - Tennessee, USA

Top 10 cities in North America

		2020	2019
▲	1	New York, US	Las Vegas, US
▲	2	San Francisco, US	New York, US
▲	3	Chicago, US	Orlando, US
▲	4	Atlanta, US	Boston, US
▲	5	Toronto, Canada	San Antonio
▲	6	San Diego, US	Dallas, US
...	7	Seattle, US	Seattle, US
▼	8	Orlando, US	San Francisco, US
▼	9	Dallas/Fort Worth, US	Chicago, US
▼	10	Las Vegas, US	Vancouver, Canada

Source: CWT Global Data Aggregation - FY2018 - June 2019

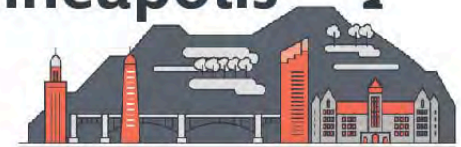
Destinations on the rise in North America

● Indiana ● Minnesota ● Oregon ● Texas

Portland



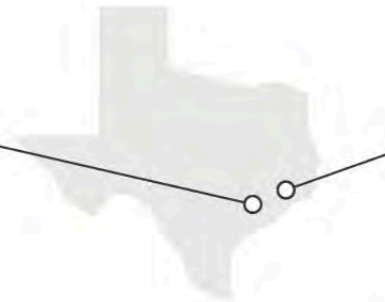
Minneapolis



Indianapolis



Austin



Houston



Destinations on the rise are locations offering better value rates than first-tier cities. They are also becoming more attractive due to an increase in facilities including new hotels and M&E venues.

Meetings and events by numbers in North America

Average lead time:

59 days



Percentage of spend on food & beverage:

42%



Average meeting duration:

3 days



Use of attendee registration websites:

61%



Cost per attendee per day:

2019: **\$234** 2020: **\$253**

+8% year-over-year

CPAPD includes: accommodation, food & beverage, audio & visual, meeting space, travel/transportation, entertainment and other miscellaneous costs.

Average group size:

73



Latin America



Election fever grips the region

Latin America's two biggest economies have undergone an electoral tempest as right-wing former army captain Jair Bolsonaro broke the Workers' Party's four-election winning streak in Brazil, while leftist populist Andrés Manuel López Obrador enjoyed a landslide victory in Mexico.

“ However, an explosion in growth is predicted for 2020-21 as activity is unleashed following the hiatus. ”

Gustavo Elbaum, Senior Director, Latin America, CWT Meetings & Events

Argentina faces its own presidential elections at the end of the year. A weakening Argentinian peso ahead of the referendum is encouraging international bookings into the country.



The rise of large events

The majority of events in the region are mini meetings of up to 30 people for healthcare and pharma companies, covering training or salesforce meetings, with around 75% of meetings lasting one to two days.

But this trend is changing, with growth in larger conventions. As companies globalize, they want to consolidate their events regionally, looking at efficiency of cost and logistics. This can allow for more investment in the content, hiring external speakers, and having additional days to make the meeting more effective.

Lengthening lead times

Lead times for events in the region are currently around 30-45 days with pressure from political and economic uncertainties affecting business decisions.

While these short lead times are challenging in terms of venue availability and accommodation occupancy, increasing numbers of businesses are taking steps to better manage their events program.

“As strategic meetings management matures, lead times will be positively affected in the next 18 months.”

Gustavo Elbaum, Senior Director, Latin America, CWT Meetings & Events

New innovative venues in Latin America



Isla Secas Reserve & Lodge, Panama

For the ultimate luxury incentive, the nine villa Isla Secas reserve is a private island resort that opened in January 2019.

Its 1,556 solar panels power the island in an eco-friendly way, while fresh, local food brings a taste of Panama to guests.



The Grand Reserve at Paradisus Palma Real, Dominican Republic

The modern, elegant design of the resort is in tune with the natural environment, creating an ambience in which the connection with nature inspires unforgettable memories. Excellent suites, fully equipped lounges with the latest technology, wellness activities and luxurious amenities.



Buenos Aires Convention Centre, Argentina

This convention center's innovative architectural design gives it column-free exhibition spaces for up to 5,000 people, while prioritizing sustainability. The center's innovative design features include solar panels, use of natural light to save energy, and rainwater collection for watering plants.

Top 10 cities in Latin America

		2020	2019
....	1	Sao Paulo, Brazil	Sao Paulo, Brazil
▲	2	Bogota, Colombia	Mexico City, Mexico
▲	3	Lima, Peru	Bogota, Colombia
....	4	Rio de Janeiro, Brazil	Rio de Janeiro, Brazil
▼	5	Mexico City, Mexico	Ocho Rios, Jamaica
▲	6	Curitiba, Brazil	Lima, Peru
▲	7	Medellin, Colombia	Nassau, Bahamas
▲	8	Belo Horizonte, Brazil	Cali, Colombia
▲	9	Buenos Aires, Argentina	Curitiba, Brazil
▲	10	Cartagena, Colombia	Medellin, Colombia

Source: CWT Global Data Aggregation - FY2018 – June 2019

Destinations on the rise in Latin America



Destinations on the rise are locations offering better value rates than first-tier cities. They are also becoming more attractive due to an increase in facilities including new hotels and M&E venues.

Meetings and events by numbers in Latin America

Average lead time:

45 days



Percentage of spend on food & beverage:

30%



Average meeting duration:

2 days



Use of attendee registration websites:

6%



Cost per attendee per day:

2019: **\$232** 2020: **\$260**

+ 12% year-over-year

CPAPD includes: accommodation, food & beverage, audio & visual, meeting space, travel/transportation, entertainment and other miscellaneous costs.

Average group size:

46



Europe

Middle East & Africa



The winds of economic concern?

There is no doubt the Brexit vote in 2016 was the beginning of economic uncertainty around the euro zone. Nevertheless, economies and business bounded on with a positive outlook and finding opportunities to capitalize on currency fluctuations.

The uncertainty has given meeting planners some financial benefit.

“ London and the UK continue to be strong for meetings and events and the resulting devaluing of the pound has made the UK even more attractive. ”

Ian Cummings, Vice President, EMEA, CWT Meetings & Events.

No surprise then that London continues to top the region's destinations, while Manchester is a key

location to watch, with major development that include a second arena on the horizon, with a 20,000 capacity.

Economic concerns in many of the other large European economies, election uncertainties and social unrest has begun to take their toll on some of the larger corporations future spending and budgets. "Lead times are beginning to fall again" remarks Cummings, "companies are holding off on spends and cancellations are becoming more frequent again."

There are many forecasters talking of economic recession ahead and it's likely the euro zone would be one of the first to feel it.

The Middle East continues to be back in vogue as a destination with great uplift and some of the top carriers in the world offering great value for money, plenty of new hotel openings and whole host of forthcoming major events such as the EXPO 2020 Dubai and the usual sporting events. Africa also remains a hot destination for incentives and the safari opportunities are expanding to new destinations such as Rwanda.



A sustainable future – legislating for change

When the French Parliament enacted its new Loi PACTE in April 2019 – otherwise known as the Action Plan for Business Growth and Transformation law – it signaled a drive to make businesses more sustainable.

The law created a new corporate form, called the *société à mission*. A company can register if it stipulates a mission, or social and environmental goals beyond profit. It must also form a second board, distinct from the board of directors, to evaluate progress.

“This is a huge movement that in five years, is expected to incorporate 10-20% of French companies,” explains Clarisse Charot, Sales Director, France, CWT Meetings & Events France. “Any business that wants to go on working with them will have to have the same ethos. It is a huge risk, but also a huge opportunity.”



Electric movement – the evolution of automotive

The investment in electric vehicles by all major manufacturers is expected to be very significant for the region as an automotive hub.

While challenges remain, including an increasingly regulated automotive industry, innovation is moving ahead—and with it is a need for training,

product launches, sales conferences and immersive events.

Porsche is set to launch its electric Taycan by the end of the year, and Audi is hot on its heels with the e-Tron GT in 2020, with rumors of an electric Jaguar F-type in 2023, following closely behind.

Every manufacturer is investing in that area, and although the auto industry might be facing some challenges, investments across the board and a need to showcase new products at roadshows will continue, ensuring that sector remains buoyant.



Destinations to watch

Emerging destinations in Europe, the Middle East and Africa are increasingly popular. Possibilities abound in cities that offer value, excitement and inspiration.

Copenhagen has become renowned for its sustainability credentials, and is aiming to become the world's first carbon neutral city by 2020. It is already well on the way, with more than 70% of its hotel rooms holding official eco-certification. It is also home to six hotels in the Brøchner and Arthur

Hotel Group, the world's first carbon neutral hotel group.

Other up-and-coming destinations include Athens, Greece; Budapest, Hungary; Dublin, Ireland; and Istanbul, Turkey.



Copenhagen, Denmark



Athens, Greece



Dublin, Republic of Ireland

New innovative venues in Europe, Middle East & Africa



Hamburg Messe CCH, Germany

Congress Center Hamburg is set to re-open in 2020 as the largest convention center in Germany, with state-of-the-art exhibition halls seating up to 12,000, all with low energy consumption, and designed to let light flow in.



Paris Expo Porte de Versailles, France

Pavilion 6 will be transformed with an urban farm atop its 150,000 sq ft (14,000 sq m) rooftop available in 2020 for team-building and other events. A rooftop bar and restaurant on the panoramic terrace will be run by Le Perchoir, serving food created with the farm's organic produce.



Red Bull MK-7, Milton Keynes, UK

For the 'wow' factor, the new Red Bull MK-7 venue in Milton Keynes, UK, centers around an auditorium housing the team's collection of racing cars dating back to 2005, with a separate mezzanine area and 22-seat boardroom. The venue can be hired exclusively for up to 450 guests for a reception.

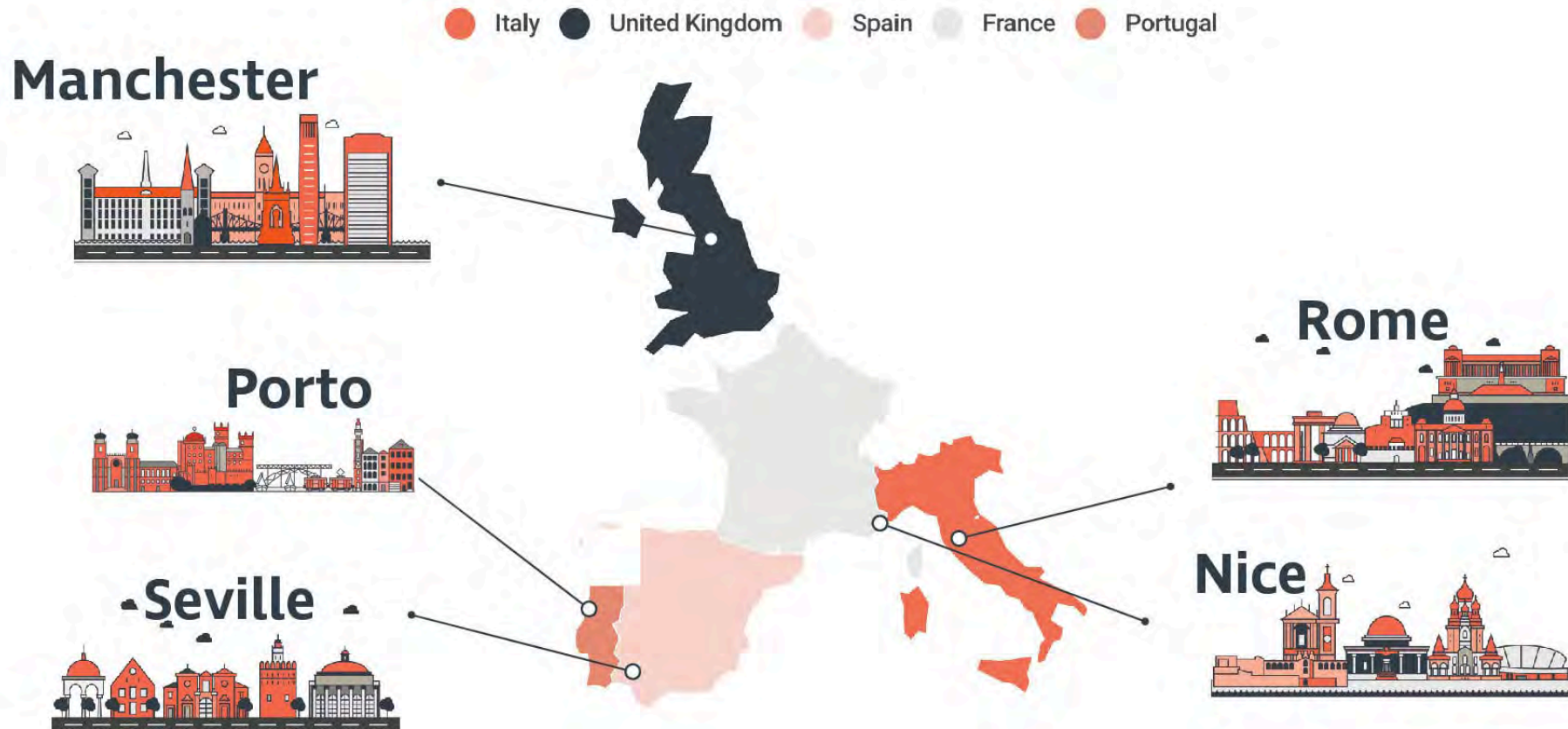
Top 10

cities in Europe, Middle East & Africa

		2020	2019
....	1	London, UK	London, UK
▲	2	Frankfurt, Germany	Moscow, Russia
▲	3	Paris, France	Barcelona, Spain
....	4	Berlin, Germany	Berlin, Germany
▼	5	Barcelona, Spain	Hamburg, Germany
▲	6	Milan, Italy	Vienna, Austria
▲	7	Cologne, Germany	Stockholm, Sweden
▼	8	Stockholm, Sweden	Cologne, Germany
▲	9	Amsterdam, Netherlands	Paris, France
▼	10	Vienna, Austria	Frankfurt, Germany

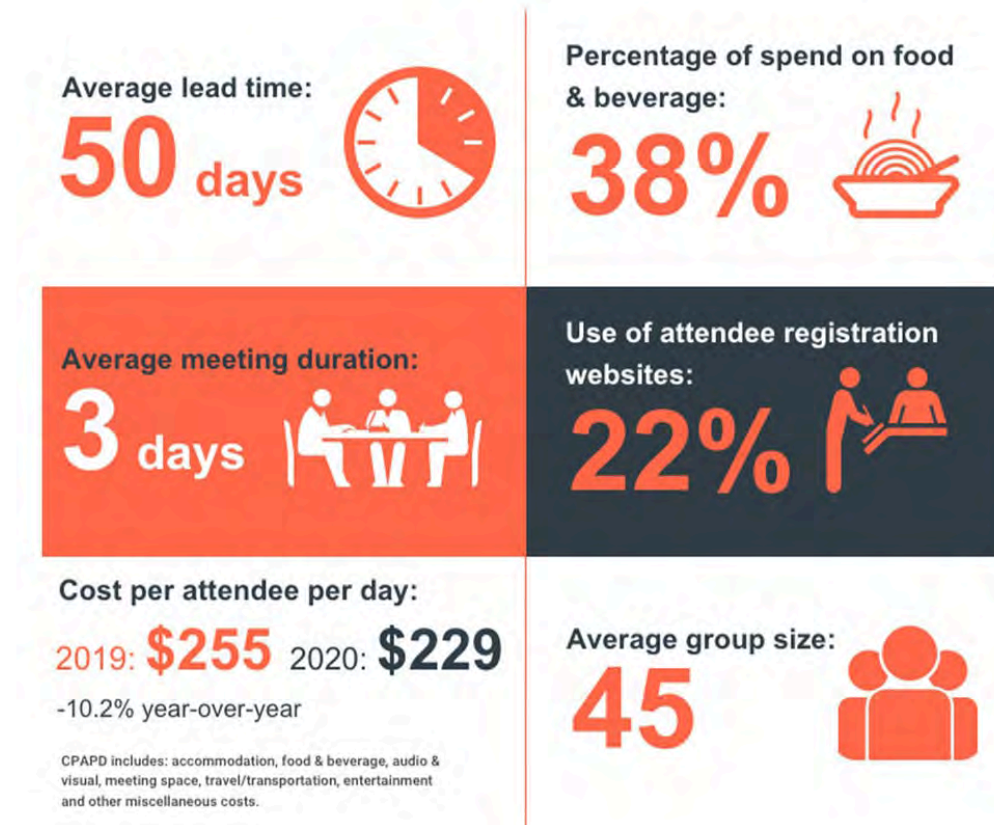
Source: CWT Global Data Aggregation - FY2018 - June 2019

Destinations on the rise in Europe, Middle East & Africa



Destinations on the rise are locations offering better value rates than first-tier cities. They are also becoming more attractive due to an increase in facilities including new hotels and M&E venues.

Meetings and events by numbers in Europe, Middle East & Africa



Source: CWT Global Data Aggregation - FY2018 – June 2019

Asia Pacific



Growth continues in uncertain times

While the protests in Hong Kong caused immediate disruption to the M&E market, the longer-term outlook for the city and the wider Asia Pacific region remains strong.

“ Events and meetings due to be held in Hong Kong had to be rescheduled or relocated. Demand is still there despite short-term challenges, planners are starting to plan forward for the following year. ”

Sam Lay, Senior Director, Asia Pacific, CWT Meetings & Events

Fears about the potential detrimental impact of a prolonged US-China trade war on economies across the region have also caused some nervousness among companies.

Despite this cloud, there are dynamic opportunities in Southeast Asia with major corporates and multinationals relocating their production and manufacturing units to countries such as Thailand, Vietnam and Indonesia.

“Growing local talent pools, strong government incentives coupled with cost advantages puts these ASEAN markets in a strong position for future economic growth,” adds Lay. “Availability of quality tourism and hospitality infrastructure provides a strong catalyst for more global and regional meetings and events.”



Up and coming destinations

There is growing demand from event organizers for the region's second and third tier cities and destinations beyond the key regional hubs.

Many groups are going to tier-two and tier-three cities in China. Japan is strong for incentives as groups prefer to go to a stable destination with cultural appeal and good infrastructure.

Bali remains an attractive incentive destination while Suwon in South Korea is benefiting from the opening of a new convention center. Malaysian cities such as Penang and Kuching are also competing for more M&E business.

"These tier two and three destinations are understanding more how this industry can bring

benefits to their community and are putting themselves on the map as locations for meetings and events," PCMA's Codinach adds.

Australia continues to be a very strong and resilient market – both for inbound meetings and events, as well as domestic clients.



New innovative venues in Asia Pacific:



Yokohama Minato Mirai International Convention Center, Japan

Japan's second largest city will see the opening of this latest addition to the PACIFICO Yokohama convention center in 2020, offering a 7,600 square meters hall and a range of other meeting spaces.



The Londoner Macao, China

The Sands Cotai Central resort in Macao is being given a London-themed makeover including a façade modeled on the Houses of Parliament and suites designed by former England footballer David Beckham. Events space of 34,300 square meters will include 13 ballrooms and six meeting rooms. The Londoner Macao opens in 2020.



Queen Sirikit National Convention Center, Bangkok, Thailand

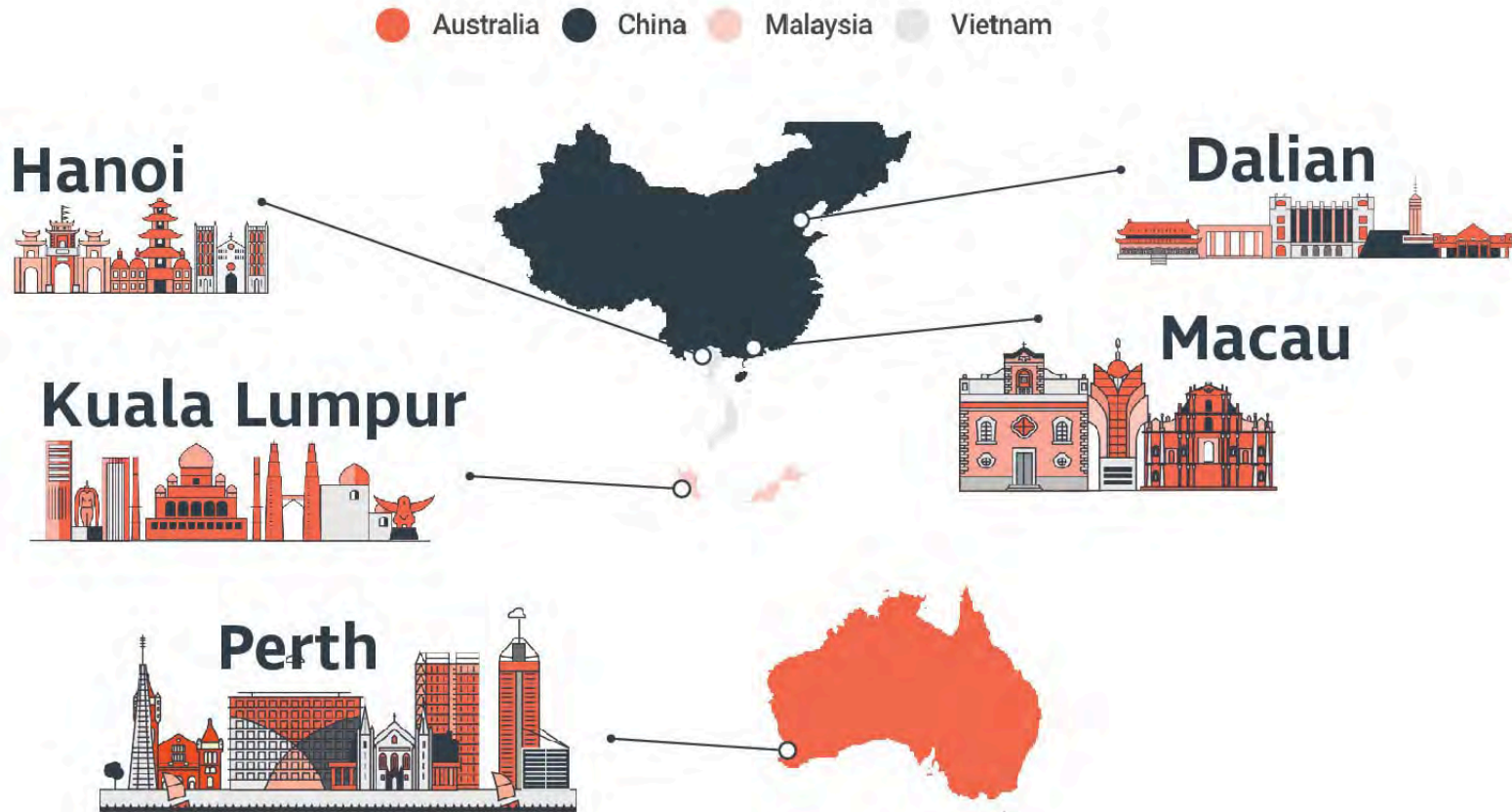
This major Bangkok convention center is being demolished to make way for a new facility offering three times more space. It is due to open at the end of 2022.

Top 10 cities in Asia Pacific

		2020	2019
....	1	Shanghai, China	Shanghai, China
▲	2	Beijing, China	Singapore
▼	3	Singapore	Beijing, China
....	4	Bangkok, Thailand	Bangkok, Thailand
....	5	Sydney, Australia	Sydney, Australia
....	6	Tokyo, Japan	Tokyo, Japan
....	7	Hong Kong, China	Hong Kong, China
▲	8	Mumbai, India	Melbourne, Australia
▼	9	Melbourne, Australia	Mumbai, India
....	10	Chengdu, China	Chengdu, China

Source: CWT Global Data Aggregation - FY2018 - June 2019

Destinations on the rise in Asia Pacific



Destinations on the rise are locations offering better value rates than first-tier cities. They are also becoming more attractive due to an increase in facilities including new hotels and M&E venues.

Meetings and events by numbers in Asia Pacific

Average lead time:

38 days



Percentage of spend on food & beverage:

20%



Average meeting duration:

4 days



Use of attendee registration websites:

7%



Cost per attendee per day:

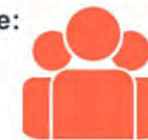
2019: **\$276** 2020: **\$233**

- 15.6% year-over-year

CPAPD includes: accommodation, food & beverage, audio & visual, meeting space, travel/transportation, entertainment and other miscellaneous costs.

Average group size:

74



Why China is different

China's unique business environment

- Relationships play a very pivotal role in Chinese business culture and very often have a stake in influencing key decisions.
- China's homegrown technology platforms such as Wechat, Alipay, TaoBao and Baidu are used extensively in both consumer and business activities.
- Because of the massive domestic market and geographical size, service providers need to consider both scale and coverage when operating in China.
- In China, a fapiao is a legal receipt that serves as proof of purchase for goods and services. It is an essential component of China's tax law, and compliance for businesses. Unlike other markets where invoices serve as a tax receipt, China's fapiao invoice system also serves as a warranty against tax evasion. Fapiao has to be issued prior to getting payment from the client.
- Very aggressive competition from local service providers, suppliers and ground operators who have advantages in cost and language.

Smarter meetings – a new global approach

Creating a global meetings and events program has been seen as a winning strategy by major US-based multinational organizations for many years, and there are signs that this kind of centralized approach is becoming more common with clients based in other parts of the world.

As part of this evolution and growth, some clients have branded their SMM (Strategic Meetings Management) programs under their own titles, such as GE SmartMeetings, for example. Whatever you choose to call them, the benefits of creating a global program are set to keep winning new converts as they seek to control costs, and optimize meetings and event activities across all markets.



“ New technology is part of all RFPs. Clients want innovative tools that give them more visibility, real-time data and feedback. We’re getting all the data for them and the question becomes: How can we use that data in a more creative way? ”

Saskia Gentil, Vice President, Global Sales, CWT Meetings & Events

Global rollout

There are now more global bids from European-based corporates and those in other parts of the world.

“Companies are seeing that meetings are not just an expense,” says Kari Wendel, Vice President, Global SMM Strategy & Solutions, CWT Meetings & Events. “There have been great advances in realizing that meetings are in the top two in terms of return on marketing. A lot of clients are looking at their spend in that strategic way.”

Incentives are also more regularly being included within global programs as clients look for a “holistic” approach. Previously many organizations chose to keep more creative events, such as incentives, outside their centralized meeting programs, but this is changing.

Clients are now adding more creative events and not just consolidating the smaller meetings. They are requesting a full approach to meetings and events.



Automated benefits

As with most aspects of meetings and events, automation and new technology is changing the way programs can be managed. There has also been a shift away from purely focusing on costs—with other factors becoming more important than savings, particularly in mature markets such as North America.

“They are looking at M&E holistically and mapping the attendee experience. Organizations are asking, ‘how do I try to create consistency, while at the

same time ensuring events don’t become standardized and boring?”

“It’s about more than just cost savings, it’s about visibility and better managing spend.”

Tony Wagner, Vice President, Americas & South Pacific Regions, CWT Meetings & Events

Setting goals

Despite all the advances in technology, the most crucial question for clients who decide to deploy a global meetings program is: **What strategic goals are they trying to attain?**

Louann Cashill, Global Program Director, SMM Strategy Consulting, CWT Meetings & Events, adds: “A SMM strategy should always be linked to the organization’s overall business strategy and a result of extensive stakeholder input and business need. A clearly defined strategy prioritizes an organization’s objectives for SMM and answers the question, **‘What are we trying to achieve?’**”

Cultural considerations

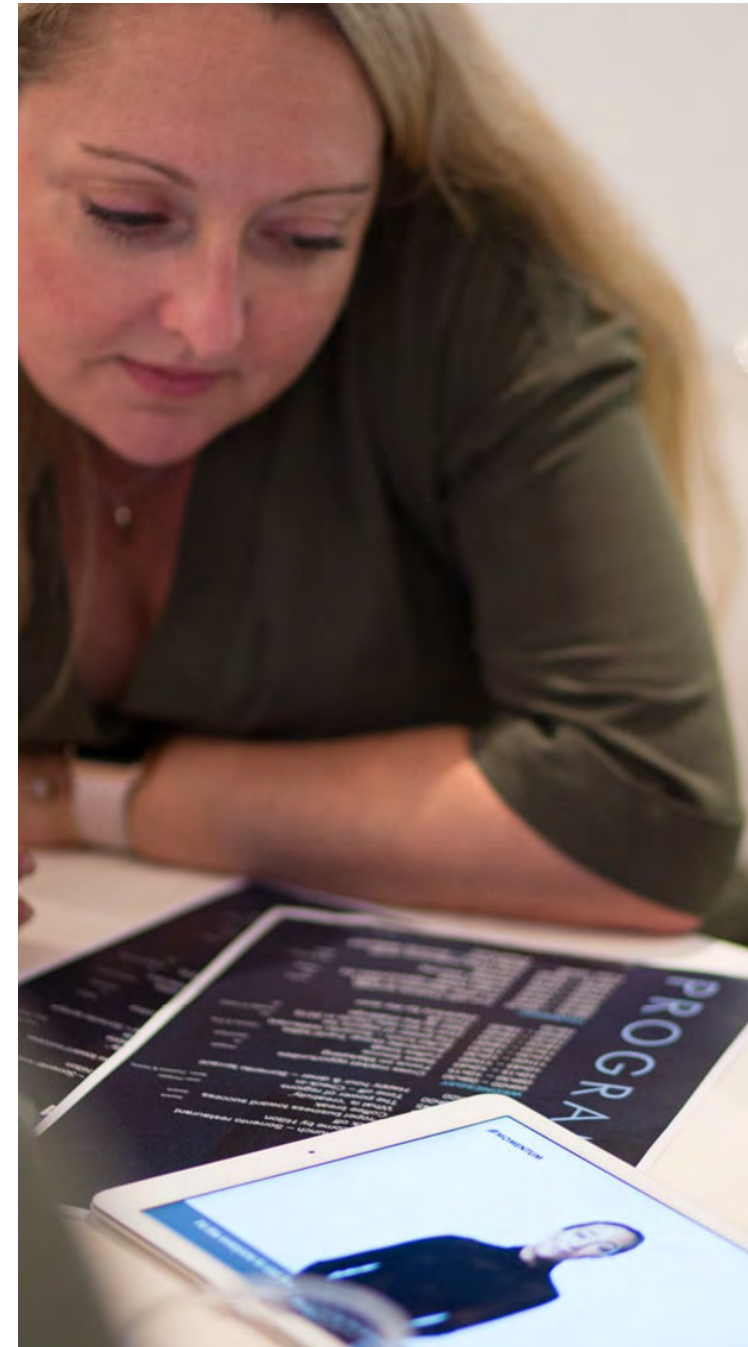
Differences in culture and the commercial nuances of how business is carried out can also make rolling out a global strategy more difficult – with China being a classic example of this. Global meeting

tools, such as Cvent, have much less of a presence in China with local technology platforms and providers holding sway.

But even though there will always be some hurdles to overcome when looking to create a truly global meeting program, an increasing number of organizations around the world are starting to see the business sense and advantages of adopting this kind of combined strategy.

“ There is still an enormous amount of untapped potential to use mobile technology to boost engagement, enhance networking between delegates, and help event planners customize, scale, and improve the overall experience. ”

Reggie Aggarwal, CEO and Founder, Cvent



Meeting budgets under pressure

Life Sciences companies are closely examining their overall operating expenses and how they manage meetings in order to free up profits to reinvest into researching and developing new products to expand their drug and device portfolios.

"We are not necessarily seeing a reduction in the number of meetings, but we're seeing different sizes and types of meetings," says Brenda Miller, Senior Director, Global SMM Life Sciences, CWT Meetings & Events. Companies are looking to cut expenses by up to 50% including meetings and events over a three-year period, although more typically it's around 20% in the sector as a whole.

"This is not about the number of meetings but the total spend. They may cut the number of attendees, reduce the duration of an event, or change the destination to smarter and more cost-effective locations."

Increased regulations

Life sciences companies are also facing an increase in the number of governments around the world requiring them to be totally transparent on how much is being spent on each healthcare professional (HCP) attending any meeting.

"It started in the US and Europe but has now spread to other regions and countries," adds Miller. "It's a progression around the globe with compliance and regulation continuing to grow. This will continue to put downward pressure on budgets."

A major development for attendees is using technology to reduce the "touchpoints" and administrative burden they face when going to events.

"Technology integrations, the use of mobile apps and reducing the number of touchpoints a customer must endure to attend a meeting is getting a lot of attention," says Miller. APIs supporting the multiple technologies within the customer "vertical" are lessening the data capture and administrative actions that can provide a negative overall attendee experience.



Industry spotlight from our sponsor

At United, we believe in connecting people and uniting the world, and are proud to play a key role in the Meetings and Events industry by helping customers convene across the globe to spark innovation, build relationships, transform organizations, and create change.

Increasingly, planners are seeking diverse destinations for participants to experience, and our global network is expanding to support this demand—with more than 120 new domestic and international routes added or announced in the past two years. During 2019, we've seen the largest increase in meetings passengers to Denver where our hub has grown to over 500 daily departures. In

addition, meeting travel to Las Vegas and Honolulu is also increasing. From a lead booking time perspective, we're seeing an average of 45 days for shorter domestic US trips, and up to 65 days for longer international journeys.

Customer experience is also of paramount importance for both fliers and their event planners. Our technology is lending a helping hand through a reimaged version of the United app that serves as a mobile traveling companion. For planners, our new United Meetings portal allows planners to set up a new meeting and discount agreement within minutes where they can quickly view the number of tickets purchased or flown and redeem rewards



such as travel certificates in real time.

A new era in M&E planning is here, and there's no better time to take to the skies and explore the world with United.

Shift generations

Over the past few years, there has been a lot of focus on the impact of the millennial generation (also known as Generation Y) within both the meetings and events sector and the wider corporate travel market.

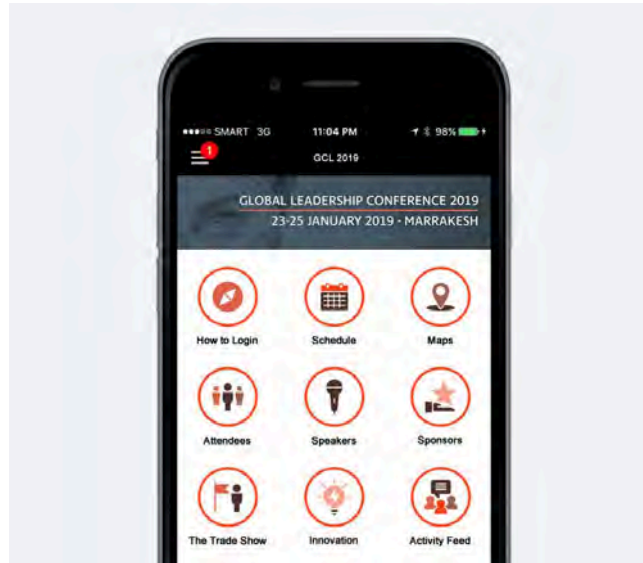
The influence of this generation (those born between 1980 and 1995) will continue to strengthen the industry as they are expected to form the largest group of business travelers across the world from 2024 onwards.

88%

of millennial business travelers said their job-related travel experience affected their overall job satisfaction



[Learn more about what CWT research reveals](#)



The arrival of Gen Z

We are also starting to see the emergence of the next generation of workers at the beginning of their careers—these are known as Generation Z or centennials born from 1996 onwards. According to Mediakix Research, while their influence, due to their age, is so far limited, this will rapidly change over the next decade as their population reach 2.56 billion globally by 2020.

So what do these new generations of attendees want from the meetings and events sector? While research can be somewhat patchy (particularly for Generation Z), it's clear that technology will play a leading part in satisfying their expectations and needs.

Centennials also already known as digital natives because they have never lived without digital technology. This has endowed them with a preternatural comfort in using technology as a group compared with older generations.

They certainly expect to be able to complete their travel bookings all on their smartphones with at least 75% of those in Generation Z making their booking on a mobile device.

Gwénaél Mulin, Senior Director France, CWT Meetings & Events shares, “The optimization of the experience is becoming a decisive factor - audiences are changing with the proportion of millennials increasing and they expect more. **We are no longer talking about the attendee experience but of participant experience.**”

The development of better apps and other technology platforms should help turn more attendees into participants. No matter their age, they are given more ways to communicate with others and express their opinions both during the event and post-event.

“ The emotional data is not biased—it measures real engagement and attention, minute-by-minute, second-by-second. ”

Gwénaél Mulin, Senior Director France, CWT Meetings & Events

This even includes the capture and assessment of emotional data to measure attendees' engagement during sessions. This has been used at events in Paris where cameras have filmed the audience to examine both their attention and emotional engagement by monitoring their facial expressions.

**People no longer
just attend events,
but expect to be an active participant.**

Discover how measuring attendees' facial expressions can improve event engagement.

[Read now](#)

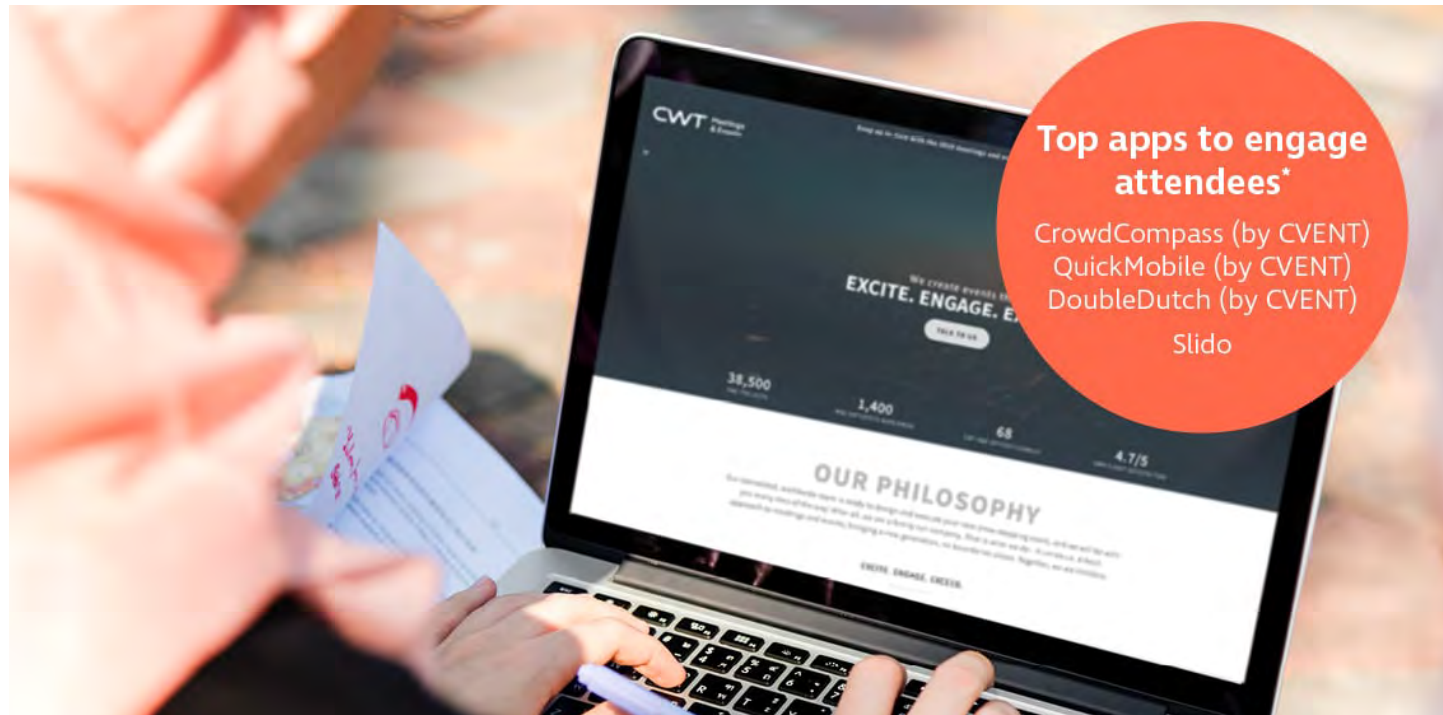
Return on experience

Of course, it can be misleading to make too many assumptions about attendees based solely on their age and generational stereotypes. Other factors such as gender, marital status, and income may also be crucial elements in the way they choose to engage or behave.

“Attendees are looking to avoid any friction—they just want to get everything arranged without having to worry. It’s about return on experience. We’ve used facial recognition technology to see whether attendees are happy or not.”

Saskia Gentil, Vice President Global Sales, CWT Meetings & Events

Cultural and regional differences can also play a major factor in how attendees interact during an event, as does the kind of mobile device and social



Top apps to engage attendees*

CrowdCompass (by CVENT)
QuickMobile (by CVENT)
DoubleDutch (by CVENT)

Slido

platforms they use. This represents an obvious challenge for organizers of global events, as attendees from different regions often will use a wider range of social media and technology.

“This will place more emphasis on event design rather than just offering an event app,” says Tony Wagner, Vice President, Americas & South Pacific Regions, CWT Meetings & Events.

There will be a more integrated focus on the attendee interaction experience in the event design. Wagner adds, “The app by itself is yesterday’s news. What are you going to do to enhance the overall attendee experience beyond the app and the agenda? How are you going to use other technology to get their feedback?”

*Source: CWT’s instance CrowdCompass and CVENT – as of June 2019



Meaningful connections

Multisensory experiences that captivate attendees mean greater engagement with the content, deeper understanding of the messaging and, ultimately, a meaningful connection with the brand.

The emergence of exciting technology means opportunities abound to create experiences that are more immersive and responsive to attendees. Think augmented reality used to share details of the recipe or provenance of each item of food at the event, or virtual reality to take medical attendees deep inside an organ of the human body.

“ The main trend we will continue to pursue is personalization, using the countless data points we have to allow attendees to create their own experiences within events. It is a question of leaving an indelible mark on the attendee. ”

Jean-Philippe Dumas, Senior Creative Director, Global Sales, CWT Meetings & Events

The rollout of 5G will make these connections quicker and smarter – your attendees could crowdsource the room temperature or choose the music they want to hear.

This feeling of being an active part of the event, rather than a passive listener in a static environment is thrilling. Even in large groups of 500 or more there is an expectation there will be personalization. It will become more focused as data is harnessed to help make sure every interaction at an event is relevant and meaningful.

Festivalization meets business

The festivalization trend is also blurring the lines of business and live consumer events. Inspired by events like Coachella, the annual music and arts festival in California, and the South by Southwest festival in Texas, the trend can be taken into the meetings and events space for a full, immersive experience.

Even room set-up and stage configuration comes from this driving trend of concerts and the live marketing space, meaning a more participatory experience for attendees.

The automotive, retail, communications and tech industries have already capitalized on the power of experiential events, but the format can be relevant across all sectors, where the purpose is clearly defined and measurable. Services such as banking, finance and personal services can also benefit from promoting customer relations with realistic scenarios.



Taking experiential to online attendees

While an experiential event's magic is in the sensory connection, there are ways to extend that beyond the venue and out to online attendees too.

“Having the right tech interface, using multi-camera angles and having speakers referencing

individual attendees by name amplifies the experience for those taking part online,” adds Beau Ballin, Vice President, Business Development, North America, CWT Meetings & Events.

Dedicated social networks, discussion groups,

videos and chatbots can also bring the experience to the attendee. Reducing the cost of VR headsets can make it an affordable option for expanding the reach of an event to those who cannot physically be present.





These
20 microtrends
are set to shape the year ahead when
planning an event with a creative twist



Dating apps for networking

Tinder-style apps will help event attendees to break the ice and turbo boost their networking.



Content that travels outside the conference room

Be it a fireside chat, a poolside morning meeting, or sharing business plans during a hike, these bite-sized content sessions will engage and inspire attendees.

[Click the graphic to view the entire list](#)

Case studies:

Event: World Figure Skating Championships
Attendees: 198 skaters and thousands of fans
Location: Milan, Italy

The International Skating Union (ISU) needed to put on a flawless show for the World Figure Skating Championships 2018, tasking CWT Meetings & Events with co-event management, logistics, accommodation, transfers, promo ticketing packages, two press conferences, and a gala dinner. A plan to engage fans showcased Italian food, culture and shopping, as well as a public ice-skating rink in Milan to build excitement.

[Read full case study](#)



Event: European market forum and global sales drive kick-off
Attendees: 300 customers and 400 sales staff
Location: Budapest, Hungary

When a banking software company needed to share its new strategy and product messaging to 300 customers after a merger, as well as kick-off the year for its 400-strong global sales team, a creative approach was a must. The events were co-located for efficiency, and attendees given a memorable experience with a Hungarian-themed evening at a railway museum, featuring local drinks and entertainment. Sales staff were motivated by a fascinating speaker - a top security ex-government official from the secret service.

[Read full case study](#)



Event: Incentive trip
Attendees: 190
Location: Dubai and Abu Dhabi, United Arab Emirates

Oil company TOTAL wanted to reward the top repair shop licensees of a French car dealer and their partners.

Culture was an important part of the incentive with visits to the Sheikh Zayed Mosque, with its 82 white marble domes, and the Louvre Museum in Abu Dhabi. A visit to Ferrari World Park allowed speed enthusiasts to get on its iconic roller coaster, the Fiorano GT Challenge, and visit the exhibition of historic racing cars.

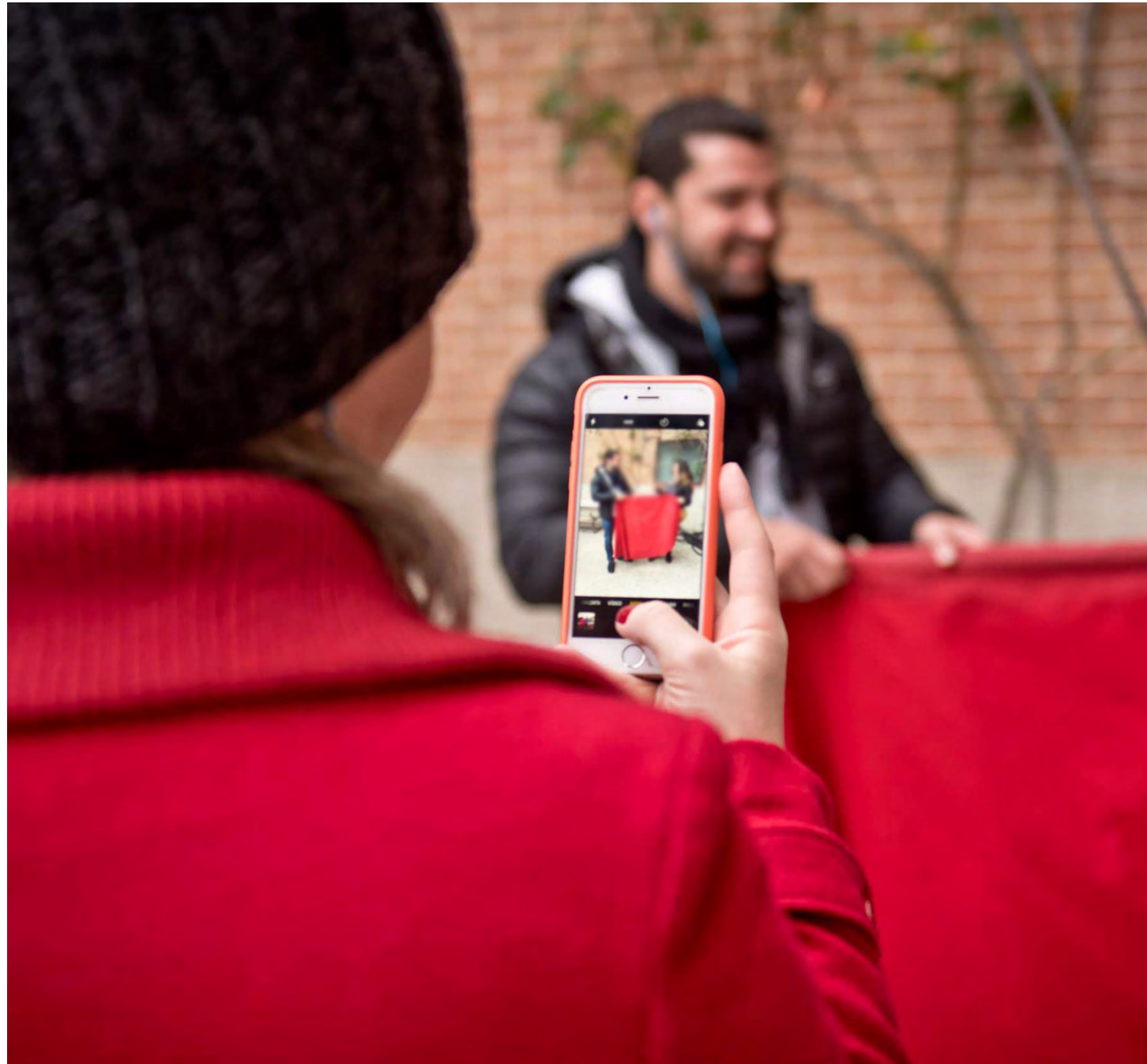
[Read full case study](#)



Tangible benefits

Automation has been a hot topic in the meetings and events industry for several years, but there are now signs it is creating a tangible and measurable set of benefits for both the planning and delivery of events.

When you get beyond the intricacies of technologies such as machine-learning and artificial intelligence (AI), what they basically do is take the inconvenience and pain points out of many meetings and events processes for both planners and attendees.



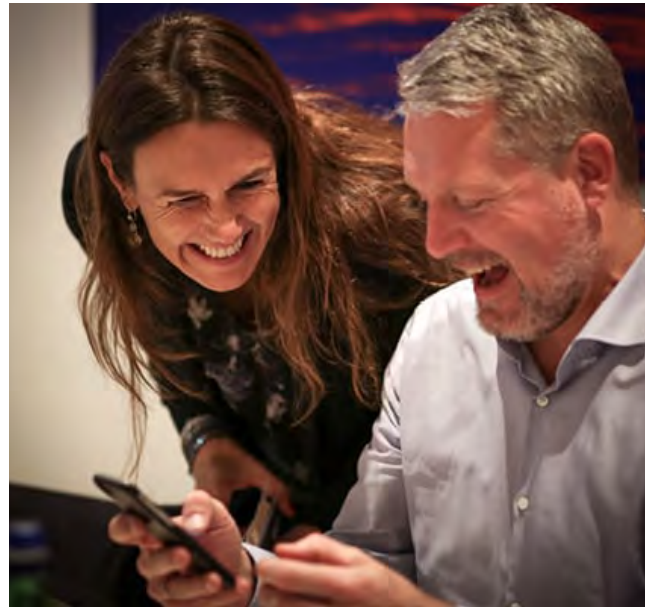
App evolution

The introduction of event apps has gathered pace over the past few years – with growth in their use by clients particularly strong since 2017. These have evolved quickly to not just offer travel itineraries and agendas but as an effective way of interacting with attendees.

“Data will be king in 2020 and beyond. Leveraging unique insights with the right technology will ultimately have the competitive advantage to act quickly, work efficiently and provide more customized experiences.”

Reggie Aggarwal, CEO and Founder, Cvent

This increased functionality has also helped speed up laborious parts of the check-in process including registration, with apps now able to facilitate the “on demand” printing of badges instead of waiting in lines. While augmented technology can be used to guide attendees around a large event and show



them where they need to go.

The use of chatbots and the ultra-quick analysis of data through machine-learning and AI will soon help to create a higher level of personalization for attendees.

“How can we use chat to help attendees when they are registering or booking online?” asks Saskia Gentil, Vice President Global Sales, CWT Meetings & Events. “In the near future, this process can be



improved by using chatbots while machine-learning can help with more personalization for attendees.”

Event apps can also be used as a way of measuring engagement during an event – they can be linked to an attendee’s social media accounts and allow them to engage easily and quickly with organizers and other delegates.

Deeper insights

Analyzing how attendees use the app can also provide invaluable insights. For example, organizers can monitor the number of views that individual sessions or speakers receive from attendees on the app. This allows them to gauge likely attendance ahead of the event, which may necessitate a move to a larger room or venue for popular sessions or speakers.

It's not just around apps that automation is paying off in offering a better experience for attendees. Interaction tools, such as Slido, allow attendees to ask questions online during sessions without the ritual of waiting for a microphone to be transported to them – saving time and also allowing the more reticent attendees to be more comfortable in asking questions.

Another technology that's starting to transform meetings and events is radio-frequency identification (RFID). This allows the automated "passive tracking" of attendees through a device attached to name badges, so clients can see which

“Passive tracking uses beacons and RFID technology on name badges which will show if an attendee is attending a session. The technology only tracks where the beacons are set up at the event, so people don't have to worry about being tracked elsewhere.” ”

Marco Ogsimer, Manager, Web & Attendee Management Operations, CWT Meetings & Events

sessions they are attending. While this may seem a bit like “Big Brother” is watching – attendees can opt not to be tracked if they wish.

The main focus of this type of automation is to make events more efficient and better for everybody by allowing attendees to concentrate on the event content and face-to-face meetings – rather than being sidetracked and delayed by having to go through slow manual tasks such as event check-in and registration. It's about creating a frictionless experience.



Online booking tools

While there has been a proliferation of online booking tools for arranging small meetings over the past decade, use of these tools by meetings bookers continues to be low.

Many online booking tools have been introduced by organizations – only to see them being used infrequently by staff who continue to arrange meetings by picking up the phone.



“There have been many small meetings tools that have been exciting for procurement teams because it’s fast, efficient, and inexpensive. However, bookers don’t necessarily want automation, they would rather call someone they know at the hotel.”

Kari Wendel, Vice President, Global SMM Strategy & Solutions, CWT Meetings & Events.

“The uptake of small meetings booking has been much slower than expected. Procurement clearly see the value but the behavioral shift from bookers is taking a lot longer than anticipated...we will get there as an industry.”

Pernilla Andrén, Regional Senior Director, Nordic, CWT Meetings & Events



Only **4-5% of small meetings are currently booked online in the Nordic region**. This could change rapidly over the next few years, as bookers start to realize the advantages of using them.

For now, Andrén says, “The take-up of technology within meetings and events tends to be much slower compared with business and leisure travel”.



What is driving the growth in incentive meetings?

Incentives are flourishing, with more unique venues, activities and destinations adding to the bubbling excitement around creating authentic experiences that truly resonate with attendees.

With researches* consistently showing incentives are one of the fastest-growing types of events, 2020 is set to be a fulfilling time for event managers and those high-achievers who secure a spot. **The goal has not changed – incentives are still about driving business success.**

Beyond improving sales and profitability, there is a growing focus on company culture and developing robust relationships between employees and senior leaders, building a deep sense of engagement and strong morale, and creating trust.

“Companies are now clear about the motivational benefits of incentives,” says Ian Cummings, Vice President, EMEA, CWT Meetings & Events.

“Incentives are ever-more engaging and people want to have life-changing experiences.”



*Sources: Oxford Economics/Events Industry, Council study, inVOYAGE trends report, SITE research shows, increasing

median spend and length of stay, Incentive Travel Industry Index



Genuine life-changing experiences

As the drive for genuinely life-changing experiences accelerates, incentives have become all about a mix of the unusual with the perennial favorites.

Off-the-beaten track destinations are growing in popularity, alongside tried and tested such as Paris, New York, Dubai, the Caribbean and South Africa.

Destinations such as Nepal, Namibia, Costa Rica, Cambodia and Montenegro are on the radar for 2020.

“Second and third-tier destinations will also be attractive in 2020 as incentive qualifiers seek authenticity over luxury,” adds Pádraic Gilligan,

Chief Marketing Officer, Society for Incentive Travel Excellence (SITE). “They want to immerse themselves in destinations like locals, not high-end tourists. Bordeaux, Seville, Montreal, and Perth have become popular alongside their more famous counterparts of Paris, Barcelona, Toronto, and Sydney because they’re the path less traveled.”

Personalized experiences

While incentives remain an important way for those who qualify to spend time with senior leadership, as well as bonding with each other, there is an emerging trend towards offering attendees a more personalized experience.

This approach can work well when a group comes from a broad demographic, explains Rodrigo Botono, Sales Manager, Brazil, CWT Meetings & Events.

In one example, 45 beverage company attendees were given a trip guide from which they could choose their activities in advance, ranging from kayaking and caving to visiting cultural sites.

“The group were together at the opening and closing ceremonies, but not everyone was doing the same thing at all times,” says Botono. “Guests had different ages and interests, so everyone had the experience they wanted to have.”



“ We are seeing more incentives include a night at leisure for attendees from our region, as they are very adventurous and happy to be left to their own devices. I think we will see more of this in the future, as long as the incentive still includes the welcome function and recognition gala dinner. ”

Michelle Sargent, Director, Australia & New Zealand, CWT Meetings & Events

Socially responsible incentives

Socially responsible incentives are top of the agenda for 2020, with team-building activities, including carrying out work in hospitals, schools, or with community groups becoming an important way for companies and their incentive guests to leave a legacy in the destination.

However, Michelle Sargent, Director, Australia & New Zealand, CWT Meetings & Events, points out that it is important to tread carefully when planning a CSR activity. “It is about thinking outside the box, whether that is a cookery class with homegrown veggies for schoolchildren, or enjoying a social event with war veterans.”

SITE’s publication of its Bangkok Manifesto (May 2019) highlighted its top mission – crowdsourced in a live vote – that “every stakeholder in the incentive travel community should embrace social responsibility as a core part of their business philosophy.”

This means that, as the next decade unfolds, incentive trips will benefit from a ripple effect that comes from doing some social good, alongside the ability to empower, retain and inspire the next generation of workforce talent.

“ Incentive travel and wellness-based programs incorporating sustainability and CSR elements with direct or indirect linkages to mental health will inevitably increase as companies seek to drive up motivation and effectiveness. ”

Richard Joslin, Founder and Managing Director, inVOYAGE



Unmissable incentive experiences



Ceviche-making in Lima, Peru

Boasting two of the world's top 10 restaurants in 2019 – Central and Maido in Lima – Peru is one of the premier destinations for a foodie-focused incentive.

Give attendees a tasty introduction to the South American country's cuisine in a hands-on session creating their own ceviche from the freshest local fish and seafood, washed down with a glass of lime-enriched pisco sour, Peru's national drink, or refreshing papaya juice.



Bathing in wine in Seville, Spain

The rich cultural heritage of Seville means there is no shortage of stunning architecture, enthralling displays of flamenco dancing, and an array of authentic tapas to try.

For an unforgettable experience, immerse attendees in five centuries of history with a private experience at the AIRE ancient baths, enclosed in a Mudéjar-style palace. Treatments include a wine bath, making full use of the antioxidant properties of the Spanish Ribera del Duero red grapes.



Sunrise trekking and stone carving in Kathmandu, Nepal

Tipped to be one of 2020's hot incentive destinations, Nepal will exhilarate attendees with its awe-inspiring Himalayan scenery, ancient Buddhist temples and intricate local crafts. Around 18.6 miles from Kathmandu, the hill town of Nagarkot's incredible panorama of the Himalayas.