



2021 Global Meetings and Events Forecast



MEETINGS & EVENTS

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Ready to Meet

Dear Readers,

Welcome to our 10th annual Global Meetings and Events Forecast. This year, we celebrate a decade of pulse checks for the meetings and events industry. While typically the year-over-year survey comparisons reveal relatively minor trends, the 2021 Forecast shines a light on how the meetings and events industry will adapt in the year following the disruptions of Covid-19. To capture the full picture, we added several new questions to the survey. More than 560 meetings and events professionals from around the world shared their expectations.

The challenges of 2020 caused significant hardship for many in the industry. I sincerely hope that everyone reading this is safe and healthy. The situation cemented the value that meetings and events provide to drive business forward, whether through recognizing and re-energizing employees, informing healthcare providers about new treatments, or receiving guidance from corporate boards, to name just a few examples. That meetings and events play an invaluable role was evident in the speed with which global organizations transitioned from in-person to virtual events. The message is clear: meetings have to happen.

Virtual and hybrid meeting formats, which were introduced nearly a decade ago, are now by necessity at the forefront of meeting design. With experience and the adoption of technology in place, meeting owners and planners will need to consider the end goal of each event or meeting to make the determination on whether in-person, virtual, or hybrid is the right approach.



GERARDO TEJADO

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

The global focus on self-care and mindfulness during 2020 has inspired the meetings and events industry to consider the attendee's individuality and well-being in a new light. In the past, many in-person meetings were designed assuming that everybody loves going to the opening reception and networking until midnight. Similarly, a lot of virtual meetings in 2020 were designed assuming that everybody is comfortable being on camera. These one-size-fits-all agendas are a thing of the past. Meetings professionals are now empowered to take an individualized approach to meeting design and to deliver the most engaging experience possible according to what the attendee needs – regardless of the delivery format.

In-person events have already started to resume. Not surprisingly, health and safety are the primary considerations when planning in-person meetings and events. Initial face-to-face meetings are expected to be small, regionally focused, and in a hybrid format – where some attendees are in person and others participate virtually. We see the hybrid meeting as the first step towards the return of in-person meetings.

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As travel restrictions ease and more meeting spaces reopen, event professionals are looking for guidance on when and how events can resume safely. Recommendations from regional health protection agencies, such as the US Centers for Disease Control and Prevention, provide a critical roadmap for safeguarding the health and safety of attendees and event staff. New resources drive confidence in travel through access to trusted information — one example is the Travel Vitals™ platform, which aggregates data from hundreds of sources to gives travel managers a single place to search for all the current travel guidelines. Some in the industry are piloting new solutions such as rapid testing and wearable devices that enforce social distancing, track Covid-19 symptoms, and help with contact tracing. Meetings professionals must confirm that venues and downstream event partners are not just talking about safety precautions but can provide assurances on a day-to-day basis that their staff are acting upon them. Duty of care considerations must factor into every sourcing decision.

It's hard to imagine 2020 without the incredible technology and Wi-Fi bandwidth that have allowed us all to stay connected, both professionally and personally. Though web conferencing platforms have existed for at least a decade, there was limited appetite to use them because nearly all meetings and events were in person. Now that we've all attended countless virtual meetings and events, we've experienced their limitations and challenges firsthand.

However, meetings professionals are optimistic about their ability to make the most of technology in their 2021 meetings and events. The proliferation of virtual platforms and attendee engagement solutions is a blessing or a curse for the industry, depending on where you sit. Meeting owners have a multitude of solutions to choose from, but determining the platforms that align with the goals of the meeting or program, company policies, and budget can be daunting. Meeting planners are best suited to carefully curate the technology, as they understand attendee engagement and all of the elements that make a successful meeting.

Not surprisingly, meetings professionals indicate that budgets for next year are decreasing, although to what degree depends on each industry and how well its regional economy is recovering from the disruptions of 2020. Air fares and hotel rates are still somewhat unknown – planners are loath to book anything too far in advance in the current environment. To combat this uncertainty, suppliers are shifting to more lenient cancellation or change policies, often at no cost. It will likely be a few years before air fares and hotel rates become stable and predictable.

Globally, there is more scrutiny on the decision-making process as to whether a meeting needs to happen, with the expectation that all meetings and events are aligned with stringent meetings management policies. There's now a greater focus on travel in meetings policies to better protect employees. The disruptions of 2020 provided some urgency to revisit those policies, which is frankly long overdue. Organizations need to account for their employees, regardless of the meeting or event size or format.

In light of all this, I am optimistic that our industry is taking the right steps to return to in-person meetings safely. And I am encouraged to see how nimble the industry has been. Let's remember the valuable lessons we have learned in 2020 and continue to embrace uncertainty with creativity and innovation in 2021.

Saludos,

Gerardo Tejado

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

Q&A



TWO QUESTIONS FOR DREW CRAWLEY, CHIEF COMMERCIAL OFFICER, AMERICAN EXPRESS GLOBAL BUSINESS TRAVEL

What is American Express Global Business Travel (GBT) doing to support customers during these challenging times?

In addition to taking care of travelers, our customers are counting on us to help get the world moving again. To pave the way for business travel and meetings and events to re-energize the global economy, governments must show leadership. GBT, along with airline and airport partners on both sides of the Atlantic, has called for rapid, pre-departure testing to replace quarantine on a pilot air corridor between London and New York. This would be a sensible, risk-averse first step towards easing restrictions. It would benefit the economies in London and New York. The airports, airlines and the travel supply chain serving the route would generate much-needed revenue. Furthermore, the data gathered would enable governments and the relevant authorities to make well-informed decisions about opening up more routes in the future. Managed travel brings control, reporting and visibility, with appropriate health and safety measures built in to the program.

How has the role of travel management companies (TMCs) changed?

The stakes are now higher for corporate travel managers and meeting owners. They are increasingly responsible for the well-being of colleagues and attendees. Symbiotically, this reflects the role of the TMC. The supercharged travel and meetings management required for this new era highlights the value of the TMC: the layers of duty of care, data and budget visibility, reporting and analysis, and simplifying complexity for our customers. This is a defining moment for our industry.

Global Activity and Trends



Necessity Drives the Move to Virtual

After the initial shock of global shutdowns, and the ensuing wave of postponements and cancellations, the meetings and events industry appears to be adjusting. Once it became clear that the disruption was going to last longer than originally expected, meetings professionals around the world transitioned to the world of virtual alternatives. There is still a demand for travel, but the lack of consistency in government travel policies, procedures, and protocols are impacting international travel for both transient travel and meetings and events.

Recent months have shown that societies, economies, and individuals suffer when travel is restricted. For example, according to data from EVCOM/BVEP, in the UK alone, the events industry is worth £70 billion and accounts for 50% of spend in the visitor economy. Virtual meetings can't deliver that value to economies.

However, engaging with employees and customers remains a critical driver for businesses, and meetings and events are crucial for that to continue, even during periods of disruption. It should not be a question of "if" a meeting is going to happen, it's "how." Planning meetings that meet safety requirements and are effective, whether virtual, hybrid, or in-person, remains the goal of meetings professionals.

It should not be a question of "if" a meeting is going to happen, it's "how."

The industry has had to mature quickly to meet the challenge, and many meeting planners noted that they have faced a steep learning curve over the previous months as they've learned how to implement new technologies and new safety and security protocols. The meetings industry already possessed a lot of the technology to execute virtual and hybrid meetings; Covid-19 just accelerated the innovation and adoption of these technologies. Milton Rivera, vice president, Global Business Development, Global Client Group, and APAC Region, American Express Meetings & Events, explains, "Everyone understands this is a monumental shift. But once you digest that, you start to see how you can accomplish the same outcome, just in a different way."

There is no question that everyone is looking forward to meeting again face-to-face as soon as it's safe to do so. There is already pent-up demand for in-person events.

GLOBAL TRENDS



Making Meetings Work in 2021

Meeting planners are looking forward to resuming in-person events over the coming year. In the meantime, they are adapting to the current environment by making the most of technology.

SAFETY AND SECURITY ARE PARAMOUNT

Top two factors influencing:

Whether to hold an in-person event

Confidence in attendee health and safety components

68%

Flexible cancellation and attrition terms

59%

Meeting location choice

Capacity to accommodate social distancing

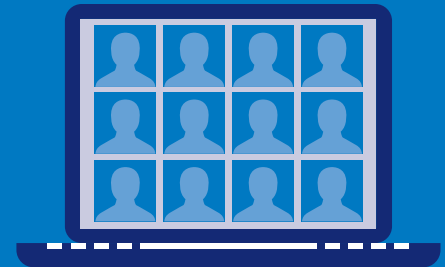
77%

Disinfection protocols

52%

VIRTUAL MEETINGS PRONE TO DISRUPTIONS AND “FATIGUE”

Top 3 challenges



40%

Lack of experience

32%

Technical issues

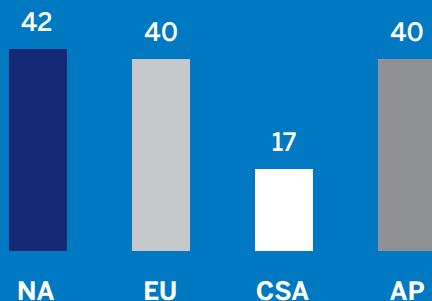
18%

Lack of engagement

THE ATTENDEE EXPERIENCE STILL MATTERS

“Improve on-site experience” is still the top choice for most regions

% of responses

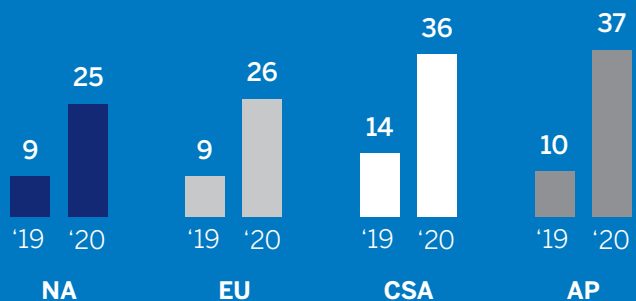


If budget increased 10%

MORE INVESTMENT IN TECHNOLOGY COULD HELP

“Increase use of technology” jumped dramatically this year

% of responses



For now, many respondents and interviewees believe this pause in business as usual could be a transformative time that will lead to a more innovative, more responsive and secure industry. As one professional said, “We are excited to watch the rebound occur. In many ways, we have been given a gift to rebuild and refocus our areas of the business.”

The 2021 Forecast is based on a survey of more than 560 meetings and events professionals and interviews with 16 industry experts. The survey and interviews took place in August and September of 2020. Respondents represent corporations, associations, buyers, and suppliers on five continents and in 37 countries. The result is a statistically and globally representative snapshot of what to expect in the meetings and events industry in 2021.

Meetings Activity

Note: Small and simple meetings were added as a new type of meeting to the survey questions this year. As this type of meeting has become more formalized and is explicitly included in more policies, it made sense to separate it out in the data.

Survey respondents said small and simple meetings would be the most common type of meeting held in 2021, in all formats (in-person, hybrid, and virtual), at 21% globally, followed by internal meetings at 18%. As the small and simple meeting type is new to the survey this year, we are unable to provide a year-over-year comparison. For all other types of meetings, respondents expected to see a decrease in activity levels ranging from -1.3% for internal meetings to -4.4% for conferences and tradeshow.

The number of attendees is predicted to stay relatively flat in 2021 for internal and senior leadership meetings. Unsurprisingly, there is a more significant decrease expected for attendees at large events: -3.7% at conferences and trade shows, and -3.2% at incentives and customer events. Several respondents pointed out, however, that virtual and hybrid meeting formats are expected to allow for increased attendance, particularly at events such as conferences and trade shows.

The expected meeting length for in-person events ranges from 1.5 days for small and simple meetings to 3.1 days for incentives and special events. Meeting length for virtual and hybrid events is measured in hours, with conferences and tradeshow coming in longest at 7.8 hours per event, and small and simple meetings averaging 3.1 hours.

Meetings Spend

The predicted cost per attendee per day ranged from a low of \$426 for small and simple meetings to a high of \$906 for incentives and special events (in US dollars). When compared to the previous year, meetings professionals expected the cost per attendee per day to decrease in 2021 across all meeting types, ranging from -1.3% for product launches to -2.7% for tradeshow and conferences. Global suppliers predict a slightly larger decrease, from -3.6% for client and customer advisory boards to -6% for small and simple meetings.

For overall meeting spend, respondents estimated that budgets would decrease by -3.7% globally. Expectations vary, however, with 56% of respondents predicting a decrease, 10% expecting budgets to stay the same, and 25% (mostly in Asia Pacific and Central and South America) predicting an increase.

When asked what area they would cut first if budgets needed to be reduced, 27% of respondents selected off-site optional activities, and 18% chose to reduce either the number of nights or off-site evening events. Conversely, if budgets were increased, 33% said they would prefer to use the extra funds to improve the on-site experience, and 31% said they would increase the use of technology.

Hotels and Meeting Space

Mid-tier properties continued to be the top choice for meetings professionals, with respondents indicating that just over one-third (36.9%) of events in 2021 would take place in that property type, followed by nontraditional meeting facilities at 16.8%, resort properties at 16.2% and luxury properties at 15.4%. This varies slightly from the previous year, when respondents expected mid-tier properties to account for 45% of bookings and nontraditional meeting facilities to account for 10%. This may be due to nontraditional facilities having more outdoor space to accommodate social distancing requirements.

The predicted average group rates for hotels varied by region. Globally, 42% of respondents expected rates would drop, although 45% of respondents in Central and South America said they expected to see rates increase. Planners may be expecting to see specials and promotional deals as properties reopen, and that may be true in some areas, but as Frank Passanante, senior vice president of Hilton Worldwide Sales, explains, “We can look at the trends but ultimately the markets are going to dictate what will happen with rates.” Properties will need to recoup some of their lost revenue, particularly in areas that experienced more severe shutdowns.

Meeting space is expected to be readily available in 2021, but more difficult to book in 2022 due to increased competition for space and the potential contraction of supply due to bankruptcies and closures. Meeting spaces will need to be larger to accommodate physical distancing requirements for attendees – for example, a 50-person event may need a 100-person space, depending on the event requirements – which will also put a squeeze on available supply.

As more requests for proposal require hotels and properties to demonstrate that they have the ability to support hybrid programs well – for example, they have good Wi-Fi and IT capabilities and access to the latest audiovisual equipment – planners may find they need the services of professional sourcing teams that have experience in vetting suppliers.

The top factor influencing location selection was “disinfection and social distancing protocols,” so hotels must also demonstrate that they follow stringent sanitizing and health and safety guidelines.

Global Air

Expectations for group air costs in 2021 vary substantially, with 32% of respondents predicting an increase in rates, 32% predicting a decrease, and 22% responding that they don't know what to expect. With so much uncertainty over the timing of airlines re-opening routes, it's no wonder that professionals aren't sure what to expect.

When asked what they most value in their group air provider, respondents selected "crisis management" and "favorable cancellation policies" at a much higher level than in previous years. They also overwhelmingly stated that aircraft cleaning protocols and the ability to social distance passengers were equally important factors when selecting their group airfare.

Global Meeting Trends

It's All About Trust

The meetings and events industry was built on strong relationships between professionals, suppliers, clients, and attendees. Those relationships have never been more important. As Linda McNairy, vice president, Americas, American Express Meetings & Events, explains, "Trust is key. There is an enhanced focus now on duty of care requirements and how to protect attendees, both at face-to-face and virtual events."

Meeting planners must now engage with attendees from the very beginning of the process to find out whether they even wish to travel. As one professional explains, "A happy employee is a productive one, and planning meetings that employees are not comfortable with is counterproductive."

Destination Selection

When it comes to destinations for in-person meetings and events, respondents indicated that they would stay closer to home in 2021. Local and regional destinations are expected to be the most popular, with less densely populated second-tier cities and suburban areas that are within easy reach of transportation hubs particularly attractive. International destinations will be more difficult to plan for, with conflicting travel policies and procedures and the uncertainty of whether attendees will be required to quarantine on arrival or once back at home. The priorities for all locations will be safety and security, ease of transportation, and supplier stability.

Meetings professionals recommend planners consider booking space as early as possible to secure their top choice. With more lenient change and cancellation policies, venues are doing what they can to ease nerves and attract bookings. Local destination marketing organizations and convention and visitor bureaus (CVBs) are ready and able

to provide a wealth of advice and information, including ideas for available outdoor spaces and larger nontraditional venues, such as stadiums. Planners are encouraged to be open-minded about how suppliers can assist with their meetings and events. In addition to monetary incentives, some venues and CVBs can provide assistance with livestreaming, event volunteers, and more.

At the regional level, there may be government grants available to encourage the return of business travel and events. Australia, for example, has announced a \$50 million program for organizers of business meetings, conferences, and exhibitions, to apply for grants that cover up to 50% of their costs.¹

Ground Transportation

In addition to hotels and air, ground transportation must now be considered as a key component of an attendee's journey, rather than an afterthought. The majority of ground space companies are small, local businesses, so vetting them has always presented a challenge. But with risk management being top of mind, planners need to find ways to make sure that their ground suppliers are following all duty of care requirements. Ground service has to change to accommodate cleaning requirements as well as government regulations regarding spacing and loading of vehicles. Vehicles will need to be cleaner, drivers will need to be screened and more prepared – these health and safety protocols will make everything much better for the attendee experience.

According to John Pino, chief strategy officer of miMeetings, "Ground has always been the ugly stepchild of meeting planning that no one wants to deal with, but when it doesn't go well it can really leave attendees with a bad impression." He explains, "If a person arrives at the airport excited to attend an event and the car doesn't show up, or it gets a flat tire, or there's too much traffic, it can taint the experience. The image of ground

¹ <https://mumbrella.com.au/federal-government-announces-50m-grant-for-australias-business-events-industry-642599>.

INSIGHT

ALIGN VIRTUAL MEETINGS TO ATTENDEE PERSONAS

Individuals can respond differently when attending a virtual meeting rather than an in-person one. Extroverts may become more introverted and distractions may impact an individual's attentiveness.

Understanding your virtual audience is key to delivering a successful event that resonates and drives behavior change. We've found that categorizing attendees into one of several "personas," or general characterizations, can help planners identify the unique needs of their audiences and align the content and approach of their meetings accordingly. Read our recent Virtual Attendee Personas report to learn more (amexglobalbusinessstravel.com/meetings-events-insights).

has never matched the image of the rest of the components of high-quality events. I'm excited for that to change, and for ground to be viewed strategically as a critical component of event management."

Virtual and Hybrid Meetings

Even as in-person meetings of all sizes resume, there will need to be a virtual component for those who cannot attend in person. Beyond the pandemic, virtual and hybrid meetings will remain because our world has changed, and they have proven themselves to be useful tools in the meeting planner's toolkit. The expectation is that meetings will be considered on a case-by-case basis as to which format makes the most sense, taking into account meeting objectives, budget, and attendee preference.

Industry professionals cautioned, though, that virtual and hybrid events involve more than just setting up a conference call or livestreaming a face-to-face meeting. Planning a successful hybrid meeting, in particular, can be equivalent to the work of planning two separate meetings – one in person and one virtual. Predictably, survey respondents indicated that 35% of virtual and hybrid events would require the services of a full-service agency, which, depending on what is required, could provide presenter training, prerecorded interviews, virtual studio space, and post-event, edited sessions made available to attendees. And above and beyond those costs, there may be

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additional logistics to consider – for example, pre-event, attendees may need to have devices delivered to their locations so they can participate in educational sessions, or planners may want to include a participatory event, such as a wine tasting, which would necessitate supplies being shipped to attendees. Technology has enabled a surge of creativity when it comes to designing a meeting program, but everything comes with a cost.

Several interviewees discussed how virtual and hybrid meetings have opened up access to events for people who would not normally be able to attend in person – whether because of accessibility, financial issues, an inability to travel due to personal circumstances, or any number of other reasons. Ideally, this trend will lead to increased inclusivity and events that are more effective and reflective of a company's workforce and audience.

Attendee Experience

In addition to costs and logistics, meeting planners must take the attendee experience into account when deciding which format is right for a particular meeting or event.

Attending an event virtually from home or in a local office space is very different from traveling to one in person. In either case, in order to successfully engage participants, a variety of factors must be considered.

For virtual attendees, considerations may include whether there will be any distractions in the environment or whether the timing of the meeting is going to be an issue; planners may also need to communicate whether there is a dress code and whether the attendee needs to do anything to prepare ahead of time. A key question is always: will the technology work on all attendees' systems, and will it be robust enough to ensure good connections while also protecting privacy and security? And from a program design standpoint, the challenge of keeping people's attention once they have logged in must be considered – for example, through shorter overall length, more focus on content, or ongoing activities such as polls and breakout room discussions.

For attendees at in-person events, planners must take into account that expectations for communication are higher than before. Attendees must receive early and clear communication about:

- schedules,
- transportation,
- lodging,
- what they can expect on arrival as far as health and safety screening,
- what local regulations are for masks and distancing,
- how meals and networking events will be conducted,
- what precautions are being taken by suppliers, and
- what to do and who to contact if they feel ill or are concerned about something that happens on-site.

Post-event follow-up is essential both for feedback purposes and for health and safety requirements.

As Linda McNairy explains, “The goal is to move beyond just face-to-face to provide meaningful and exciting events in all formats.”

INSIGHT

WHAT MAKES A SUCCESSFUL HYBRID EVENT

A recent hybrid event held by a financial services company in Australia is a great example of how planners can take advantage of technology to create an engaging experience. The company felt it was important to provide an in-person event for some of their attendees while also ensuring that people who were unable to meet face-to-face could participate.

All attendees were at the executive level; 25 participated in person and 25 participated virtually. The venue, a preferred supplier partner, was chosen based on its adherence to stringent Covid-19 meetings policies and its ability to space delegates according to the government regulations. Planners also used the venue as the live broadcast hub, with the AV team onsite.

Food and beverage were personalized for each attendee. Upon arrival, guests signed in via a QR code and then received a welcome pack with hand sanitizer, information about the Covid-safe venue, and a packaged Bento-style box for the morning break. Lunch was seated and plated. Staff cleaned the venue room during each break and after lunch. Branded welcome kits that included personalized food and beverage packs were delivered to the virtual attendees ahead of the event, so that when the in-person attendees were dining and taking a break, the virtual attendees were, too.

The company used a virtual event platform that enabled a consistent, branded experience, Q&A, polling, and robust analytics. Both in-person and virtual attendees were satisfied with the meeting; 95% rated it as “very good” or “excellent.”

Meetings Management

There is one silver lining to this period of disruption: companies are taking a closer look at their meetings management policies. Robust policies help planners do their job effectively and efficiently, by formalizing approval processes, centralizing contracts with preferred vendors, identifying staffing to support planning and execution, supporting virtual and hybrid formats, and covering small and simple meetings. And of course, duty of care requirements must be met at every step of the planning process. Globally, 67% of respondents said their meetings and events policy contained explicit language around safety and security.

Even in the midst of a pandemic, climate change remains an important, and growing, consideration in meeting planning. Globally, 79% of respondents report that their organization emphasizes sustainability in meetings and events. The top three ways they do that are: 64% avoid disposable items, 58% recycle, and 49% choose organic, local food and beverage options. With the explosion of hybrid and virtual meetings, corporations can more readily consider who absolutely has to travel and who can participate virtually, thereby lowering the meeting's carbon footprint.

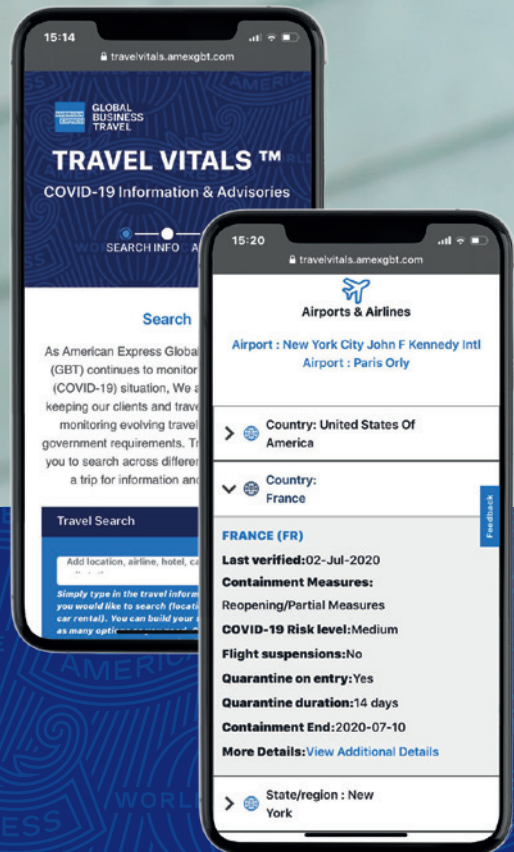
Many industry professionals have utilized this period of disruption as a chance to reflect. As one professional explained:

"This break has reminded not only our clients, but people throughout the world, the importance of interacting in person. We facilitate human engagement, we create environments for people to experience new destinations, meet new people, and share memories. We provide opportunities to celebrate, receive recognition, share ideas, develop relationships, etc. The pandemic hit the reset button on what is important to our industry: the people, the places, and the need for human engagement."

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RISE TO THE OCCASION

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Trends by Region



Moving Forward and Embracing the Challenge

“When will in-person events resume?” is the question on everyone’s mind. The answer varies by region and is not set in stone. Face-to-face meetings and events are now dependent on governmental regulations and travel and quarantine restrictions, which are still fluid in many parts of the world. So, while most survey respondents expect to restart in-person events in the first half of 2021, there will undoubtedly be some regions that resume sooner and some that resume later.

In the meantime, meetings professionals have been moving forward, embracing the opportunities and challenges of hybrid and virtual meetings and events. Many respondents told us that they are considering new and more efficient ways of working.

North America

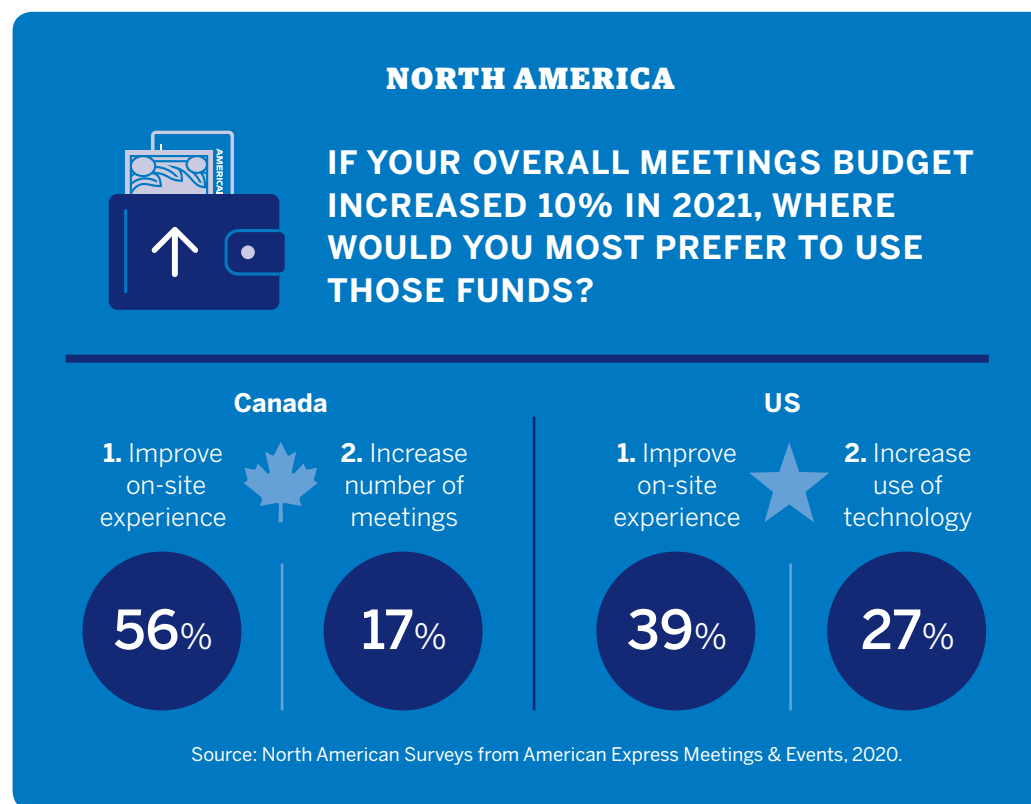
North American respondents estimated that 23.6% of their events in 2021 will include a virtual component and will be smaller local events with fewer than 25 attendees that require no air travel or hotel rooms. They expect that 45% of their virtual/hybrid meetings will be web conferences, and 27% of all virtual/hybrid meetings will make use of a mobile app. “We are excited to incorporate some of the hybrid models being offered now to increase attendee participation and allow for a higher number of attendees for all our meetings,” one professional in the region noted.

Emergency preparedness, always an important consideration, has become more formalized and explicit. Respondents described how it factors into their location selection for in-person events, as a professional in the US explained their process: “First, make sure that the staff and organization have a clear and effective process, and a risk management plan and policy is in place in all different areas of a meeting. Then make that available for attendees, and communicate it in marketing pre-, during, and post-conference.”

The leading type of meeting in North America in 2021 is expected to be small and simple meetings in the US and internal team meetings/training in Canada. Regionally, respondents anticipate decreases across most types of meetings; however, 36% expect the number of senior leadership or board meetings to stay the same.

Meeting length is anticipated to be longest for in-person incentives/special events, at 3.6 days on average per meeting, while the longest type of hybrid meeting is predicted to be conferences/trade shows, at an average of 9.7 hours.

Respondents expect that the total cost per attendee per day (excluding air) will be down for every meeting type, with modest decreases predicted in the US, and slightly larger ones in Canada. Almost two-thirds predict that overall meeting spend will be down, one in ten predicts an increase, and 17% don't know.



Respondents in the region were more likely to have explicit language in their meetings policies for payment methods and processes, at 64%, than respondents in Central and South America and Asia Pacific. They also had the highest percentage of uptake, 64%, of all regions for explicit language around the procurement of meetings and events goods and services.

If there's a bright side to all the disruption, one professional noted that they are excited that in the future, "Face-to-face meetings will be easily justifiable (pending budget allowed), based on the experience we've all had being quarantined and/or unable to meet due to Covid-19."

American Express Meetings & Events client meeting data from the Meetings Insight platform was used to identify the top 5 meeting destinations by region.

North America

1. Orlando, Florida
2. Las Vegas, Nevada
3. New York City, New York
4. Washington, DC
5. Dallas, Texas

(Source: Meetings Insights, American Express Meetings & Events client destination report, October 2019–September 2020.)

Europe

Across Europe, 77% of respondents say their organization has adopted formal meetings management policies, which is the highest of all regions surveyed. In terms of components with explicit language in those policies, 80% say the policy covers the use of preferred hotel/air/transportation suppliers, followed by safety and security at 76% and payment methods and processes at 70%.

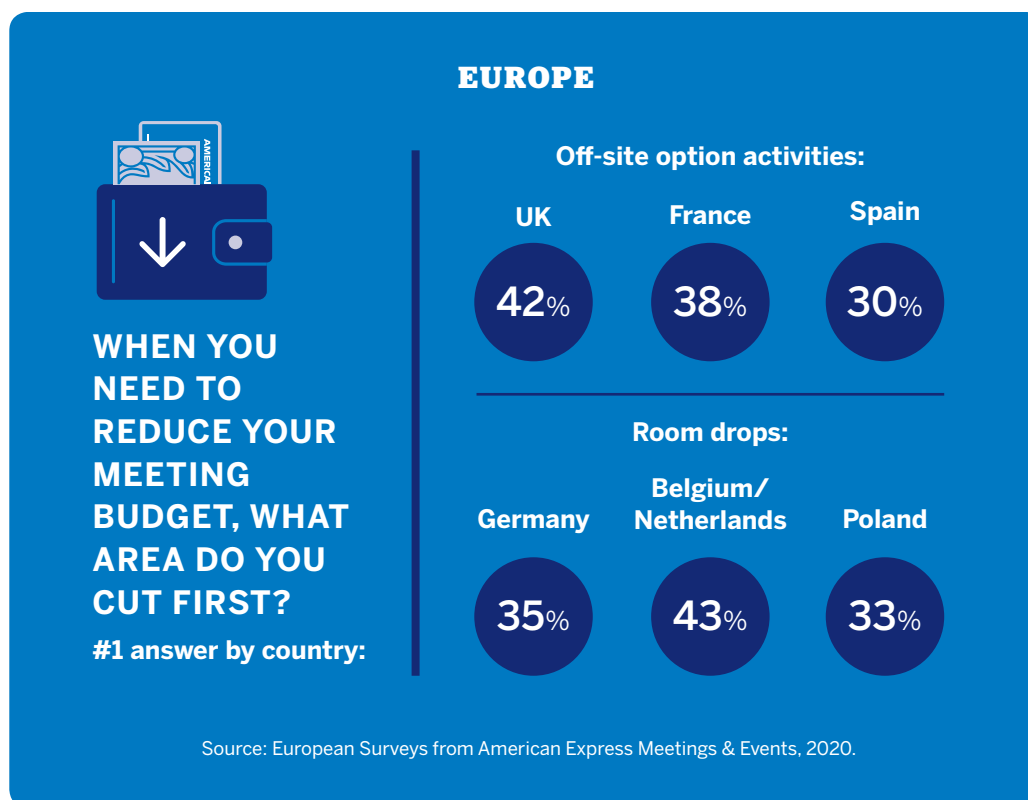
European meetings and events planners are significantly more likely than Central and South America and Asian Pacific respondents to be influenced to plan future in-person events now if there are favorable or flexible cancellation and attrition terms.

The leading type of meeting in 2021 is expected to be small and simple meetings and internal team meetings/training. Respondents across the region anticipate decreases across almost every type of meeting; at the country level, respondents in France and Belgium/Netherlands expect an increase of small and simple meetings of 5.17% and 2.40%, respectively.

Respondents expect in-person events to make up about half of their 2021 events line-up. They are predicting an increase in hybrid events into 2021 and a decrease in virtual-only events, as they plan for the return of in-person events.

Meeting length is anticipated to be longest for incentives and special events, no matter which format, at 3.7 days on average for face-to-face events and 9.4 hours for virtual and hybrid ones. Meeting length for virtual and hybrid events varies widely between countries, with Belgium/Netherlands expecting no type of meeting to last longer than 3 hours, while Germany and the UK expect both conferences and trade shows and incentives/special events to last more than 10 hours on average.

The total cost per attendee per day (excluding air) is predicted to be down for every meeting type across the region. Three-quarters of respondents said they expect their organization's overall meeting spend to be down, although one in ten said they didn't know one way or the other.



Despite these predicted reductions and uncertainties, most respondents rate their level of optimism regarding the health of the meetings and events industry in 2021 somewhere in the middle – on a scale of 1 to 10, 12% are very optimistic (8 to 10), 72% are in the middle (4 to 7), and only 15% are very discouraged (1 to 3). As one professional explained, “Covid-19 is a hurdle we can get over and learn from.”

American Express Meetings & Events client meeting data from the Meetings Insight platform was used to identify the top 5 meeting destinations by region.

Europe

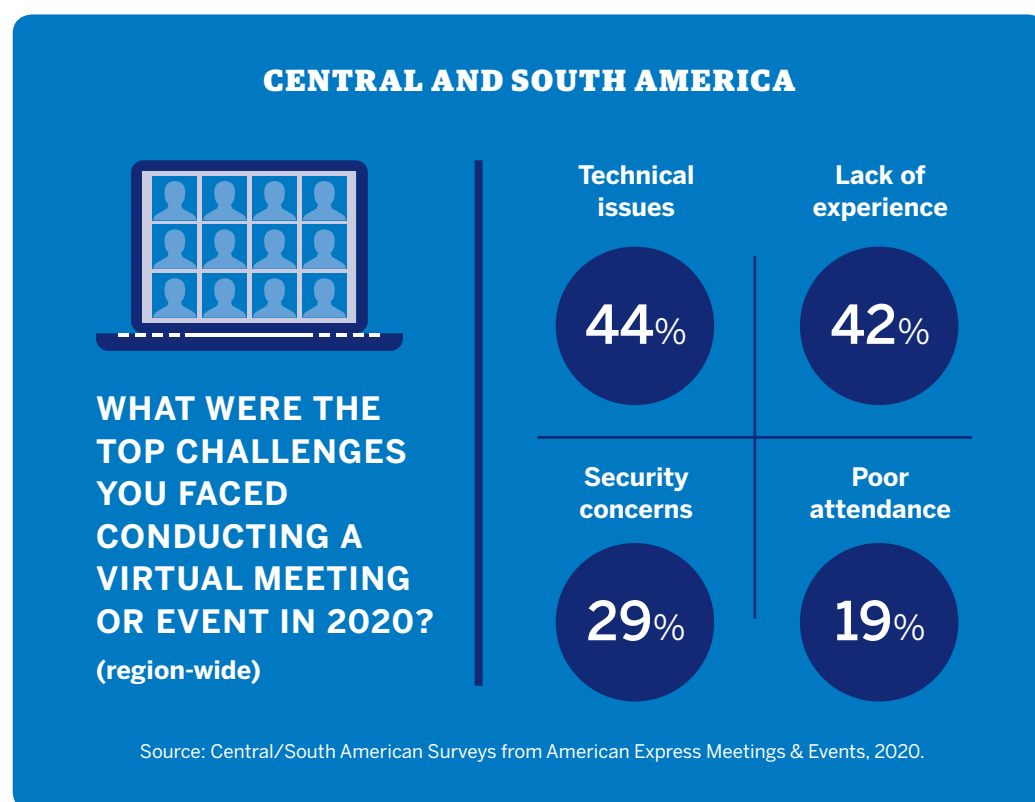
1. Madrid, Spain
2. Paris, France
3. Barcelona, Spain
4. London, England
5. Berlin, Germany

(Source: Meetings Insights, American Express Meetings & Events client destination report, October 2019–September 2020.)

Central and South America

Central and South American respondents show great optimism – the highest amongst the regions – regarding the health of the meetings and events industry in 2021. More than three-quarters of planners, or 76%, describe the career options available to them as meetings and events professionals as “excellent.”

Like the other regions surveyed, the most common types of meetings in Central and South America in 2021 will be small and simple meetings and internal team meetings/training. However, in a departure from other regions, respondents predict a fairly flat number of meetings compared to last year.



Conferences and trade shows are expected to be the longest type of meeting no matter the format, at an average of 3.1 days each for face-to-face events and 6.4 hours for virtual or hybrid ones.

The total cost per attendee per day (excluding air) is expected to be flat, ranging from -1.07% for conferences and trade shows to +0.39% for product launches. For overall budgets, 41% of respondents anticipated that their organizations' meeting spend for 2021 will increase, which was the highest of all regions surveyed.

Respondents indicated that their organizations have adopted formal meetings management policies at about the same rate as other regions. Policies that cover

virtual and hybrid meetings and small and simple meetings are the highest in this region, at 69% each. When it comes to explicit language components, Central and South American respondents are behind other regions in implementing payment methods and processes, and procurement of goods and services, at 40% and 34% respectively, but are leading the other regions in social media and sharing supplier policies, at 45% and 29%.

When conducting virtual meetings or events in 2020, planners listed technical issues, at 44%, and a lack of knowledge or experience with virtual meetings and the technology, at 42%, as the top two challenges they faced. However, they are excited about the possibilities technology has opened up. Respondents exhibited the highest level of optimism among all regions surveyed, at 85%, for their ability to incorporate technology in a way that enhances the meeting experience for attendees in 2021. As one industry professional explained, they are looking forward to being able to, “use increasingly better technologies and new techniques to solve problems or crises.”

American Express Meetings & Events client meeting data from the Meetings Insight platform was used to identify the top 5 meeting destinations by region.

Central and South America

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

(Source: Meetings Insights, American Express Meetings & Events client destination report, October 2019–September 2020.)

Asia Pacific

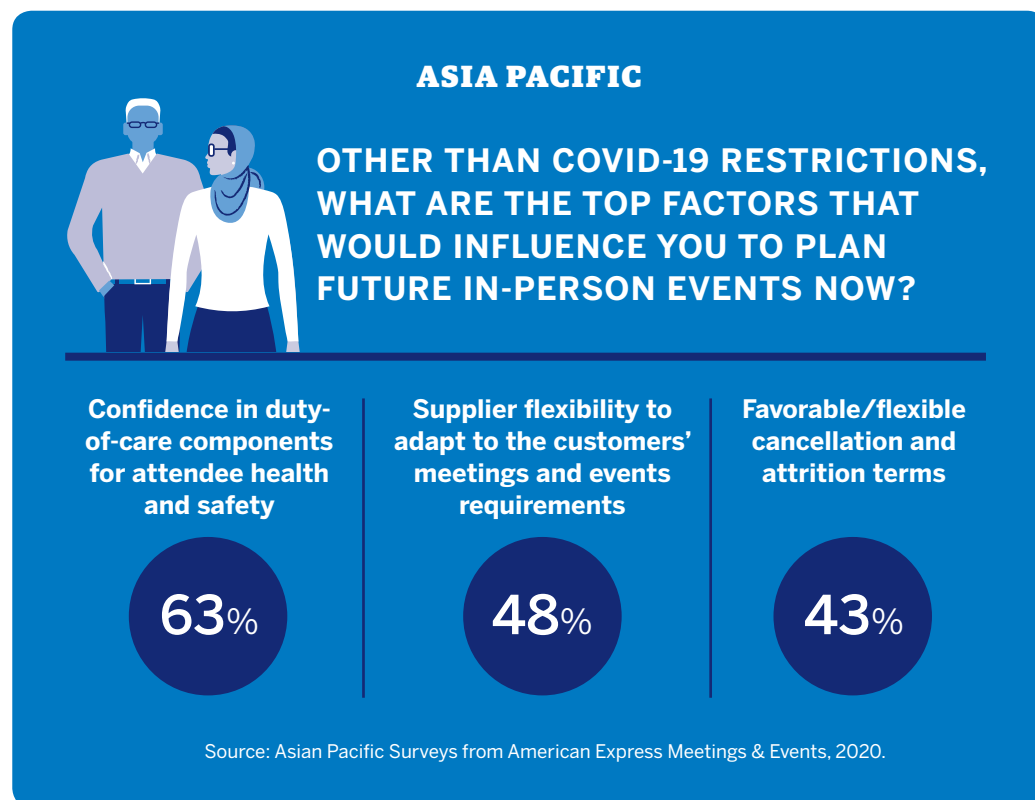
Four in ten meetings and events planners in Asia Pacific, or 43%, expect to see an increase in client/customer advisory board meetings, and nearly half, or 49%, anticipate that there will be an increase in internal team meetings in 2021. Respondents in China and Hong Kong expect to see increases across the board of every type of meeting, ranging from +0.18% for product launches to +1.16% for small and simple meetings.

Like other regions, conferences and trade shows are expected to be the longest meetings no matter which format they are in, at 3.1 days in person and 7.0 hours for virtual and hybrid events.

The total cost per attendee per day (excluding air) is expected to remain fairly flat across the region, with slightly larger decreases in Australia and either small increases or flat numbers in China and Hong Kong. Overall meeting spend is predicted to be down by -1.33%. The top factor influencing an overall change in meeting spend at the

organizations of respondents is an organization's growth plan, at 57%, followed by revenue changes, at 56%.

Formal adoption of meetings policies lags behind other regions in most categories, with only one-third stating that their organization had robust adoption. The two components that are most likely to have explicit language are the approval process, at 61%, and the use of preferred hotel, air and transportation suppliers, at 60%.



Respondents in the region are confident in using technology. Almost two-thirds, or 64%, report being very optimistic regarding their ability to incorporate technology in a way that enhances the meeting experience for attendees in 2021. The confidence in incorporating technology extends to mobile app use, with 80% of planners saying they currently use or plan to use mobile apps for meetings – the second highest percentage of all regions, just behind Central and South America, at 87%. According to respondents, the most compelling reason to use mobile apps for meetings is to facilitate networking among attendees.

Positive sentiment around the remainder of 2020 exists, as 16% of respondents say they have already resumed in-person meetings and nearly half, or 47%, expect to resume operating at least some in-person meetings and events before the end of 2020. Overall, 60% of respondents indicate that they have in-person events booked or contracted for 2020. The optimism that life is returning to normal is echoed in one respondent's remarks: "I hope that the environment will get better and better. Although

the virtual and online services are very good, and technology is getting stronger and stronger, people are looking forward to walking around.”

American Express Meetings & Events client meeting data from the Meetings Insight platform was used to identify the top 5 meeting destinations by region.

Asia Pacific

1. Tokyo, Japan
2. Singapore
3. Sydney, Australia
4. Shanghai, China
5. Kuala Lumpur, Malaysia

(Source: Meetings Insights, American Express Meetings & Events client destination report, October 2019–September 2020.)

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Data Tables

This year's data tables consist of global responses to the 15 most timely and relevant survey questions.

Methodology

To develop this 2021 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 were gathered from actual and planned meetings activity of American Express Meetings & Events globally. Proprietary surveys of meetings professionals were conducted to gather trends across North America, Europe, Asia Pacific, and Central and South America. A survey of leading hotel and airline suppliers as well as follow-up interviews were also used to inform the findings in this forecast. Data was collected based on US Dollars across all regions and dollar amounts in tables throughout this forecast indicate amounts in US Dollars.

Top 15 Data Tables

North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, 2020.

Top Factors to Influence In-Person Events

2021

Respondents were asked what top two factors, other than Covid-19 restrictions, would influence them to plan future in-person events. Confidence in duty-of-care components was the top factor across all regions.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Confidence in duty-of-care components for attendee health and safety	66%	69%	69%	63%
Favorable rates and reduced fees	16%	14%	21%	24%
Favorable/flexible cancellation and attrition terms	78%	79%	37%	43%
Limited time special offers (including free gifts and add-ons such as dinner vouchers, VIP lounge access, etc.)	0%	0%	18%	21%
Supplier flexibility to adapt to the customers' meetings and events requirements	37%	39%	54%	48%
Other	3%	0%	1%	1%

Meetings Activity by Type

Percent of total meetings

Internal team meetings and small/simple meetings are the most prevalent in every region, accounting for 32% to 43% of all meetings when the two types are combined.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal team meeting/Training	17%	19%	16%	19%
Product launch (Internal/External)	14%	9%	14%	13%
Conference/Tradeshaw	12%	13%	12%	14%
Senior leadership meeting/Board meeting	14%	13%	14%	9%
Client/Customer advisory board	15%	12%	15%	12%
Incentive/Special event	12%	10%	12%	10%
Small/Simple meetings	16%	24%	16%	22%

Top Challenges With Virtual Meetings

2021

Respondents were asked to pick their top two challenges related to virtual meetings. Lack of knowledge and experience with technology was the highest for respondents from all regions. Technical issues, lack of engagement and security issues also featured prominently in responses.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Lack of knowledge/experience with virtual meetings and the technology	36%	39%	42%	39%
Technical issues	14%	28%	44%	30%
Lack of engagement	34%	13%	8%	32%
Security concerns	6%	16%	29%	12%
Limited budget	21%	14%	12%	24%
Did not achieve meeting's objective (to inform, shift behavior, motivate, connect, etc.)	7%	10%	13%	24%
Corporate mandates related to meetings	15%	11%	8%	9%
Poor attendance	1%	2%	19%	7%
Below average learning and retention	6%	7%	7%	5%
Other (please specify)	10%	5%	1%	3%
Not applicable – I did not plan any virtual-only events	21%	20%	4%	7%

Incorporating Technology to Enhance Attendee Experience

2021 vs. 2020

Asked to rate their ability to use technology in a way that enhances attendee experience, European respondents were the most conservative, with just 39% saying they were optimistic or very optimistic, while Central/South American respondents were the most positive, with 84% saying they were either optimistic or very optimistic.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Very discouraged	0%	1%	1%	0%
Discouraged	1%	2%	1%	1%
Somewhat discouraged	7%	1%	0%	0%
Neither discouraged nor optimistic	13%	16%	3%	7%
Somewhat optimistic	30%	40%	11%	28%
Optimistic	25%	21%	23%	34%
Very optimistic	24%	18%	61%	30%
Optimistic to very optimistic	49%	39%	84%	64%

Cost per Attendee (excluding air)

2021 vs. 2020

The cost per attendee is expected to be flat or slightly lower in Central/South America and Asia Pacific, while North America and Europe are expecting a more pronounced decrease.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Internal team meeting/Training	-3.61%	-4.47%	-0.58%	-1.73%	-4.30%
Product launch (Internal/External)	-2.75%	-3.93%	0.39%	-0.31%	-3.95%
Conference/Tradeshaw	-4.56%	-5.45%	-1.07%	-0.99%	-4.95%
Senior leadership meeting/Board meeting	-3.36%	-3.51%	-0.56%	-1.21%	-5.19%
Client/Customer advisory board	-3.16%	-4.17%	-0.03%	-0.13%	-3.59%
Incentive/Special event	-3.49%	-4.60%	-0.47%	-0.55%	-3.73%
Small/Simple meetings	-3.78%	-3.56%	-0.87%	-1.60%	-5.95%

Overall Meeting Spend Within Organizations

2021 vs. 2020

Expected meeting spend for 2021 is lower across the board, with the smallest decrease in Central/South America and the largest in Europe.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
	-5.70%	-8.07%	-0.57%	-1.33%

Preferred Area of Investment

(if overall meetings budget increased 10%)

2021

With more budget, respondents would prioritize improving the on-site experience and increasing the use of technology.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Increase number of meetings	10%	11%	10%	7%
Increase number of attendees at meetings	7%	9%	9%	2%
Increase number of days for meetings	1%	1%	7%	4%
Improve on-site experience	42%	40%	17%	40%
Improve content delivery	8%	9%	17%	7%
Increase use of technology	25%	26%	36%	37%
Other	0%	2%	1%	0%
Don't know	8%	2%	2%	2%

Cost Area Cut First in Meeting Budget (and still maintain customer experience)

2021

In the face of reduced budgets, respondents from all regions would cut off-site optional activities first. Decreasing the number of nights or removing off-site evening events were next on the list.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Room drops	11%	16%	5%	6%
Food & beverage	9%	4%	4%	7%
On-site travel staff	3%	6%	6%	9%
Off-site evening events	19%	12%	23%	17%
Communication	0%	3%	4%	1%
Use of Destination Management Company (DMC)	10%	9%	6%	20%
Off-site option activities	25%	28%	29%	27%
Number of nights	18%	16%	23%	12%
Other: please specify	5%	5%	0%	1%

Meetings Management Policy Adoption

2021

All regions report a high level of policy adoption, although formal inclusion of policies for virtual/hybrid and small/simple meetings are lagging.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Formal policy for meetings	72%	77%	72%	69%
Centralized staff to support meeting planning and execution	70%	71%	71%	65%
Approval process for meetings	74%	76%	72%	66%
Specific technology or software for managing meetings	65%	64%	72%	66%
Centralized contracting with preferred vendors	67%	76%	70%	66%
Inclusion of virtual and hybrid meetings	62%	58%	69%	57%
Inclusion of small/simple meetings	59%	70%	69%	60%

Meeting Policy Explicit Language

2021

Safety and security, approved suppliers, use of technology and approval processes are the policy components most likely to have formal language.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Meetings ROI metrics	26%	16%	29%	36%
Global expansion standardization of meetings and events program	30%	39%	36%	43%
Use of third-party meeting planners	44%	27%	23%	36%
Payment methods and processes associated with meeting/events goods and services	64%	70%	40%	58%
Use of meetings planning technology	50%	57%	68%	58%
Procurement of meetings/events goods and services	64%	43%	34%	51%
Social media	22%	18%	45%	20%
Use of preferred hotel/air/transportation suppliers	59%	80%	58%	60%
Approval process	62%	61%	39%	61%
Safety and security	68%	76%	67%	51%
Use of Sharing Economy suppliers (e.g., Airbnb, Uber, Lyft)	16%	8%	29%	9%
Virtual and hybrid meetings	34%	54%	67%	46%
Small/simple meetings	33%	49%	40%	36%
Other	1%	1%	0%	1%
None of the above	6%	4%	2%	1%

Likelihood of Making Efforts Towards Sustainability

2021

Sustainability still matters; 58% to 67% of respondents are, at a minimum, very likely to address sustainability in their meeting plans for 2021.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Not at all likely	2%	1%	1%	0%
Slightly likely	11%	9%	12%	11%
Moderately likely	14%	19%	26%	26%
Very likely	42%	47%	43%	35%
Completely likely	22%	20%	15%	25%
Don't know	8%	4%	3%	3%

Group Hotel Rates

2021 vs. 2020

Central/South American and Asian Pacific respondents are expecting a slight decrease in group hotel rates, while North American, European and Global Hoteliers are predicting a larger decrease.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
	-2.21%	-2.12%	-0.37%	-0.62%	-1.78%

Group Air Rates

2021 vs. 2020

Planners in all regions expect group air rates to decrease in 2021, ranging from a modest -1.50% in Europe to -15.00% in Central/South America.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
	-2.50%	-1.50%	-15.00%	-3.00%

Room and Meeting Space Availability

2021 vs. 2020

Meetings professionals are planning for worst-case scenarios of decreased hotel room and meeting space availability due to the pervasive news of hotel closures, and the new health and safety requirements associated with social distancing. Meanwhile, hoteliers are aware of actual volumes for 2021, which will be down, and they anticipate that closed hotels will reopen under new ownership, increasing availability in 2022.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
2021 room availability	2.90%	0.37%	0.91%	0.98%	1.70%
2022 room availability	2.16%	1.80%	3.65%	2.58%	4.00%
2021 meeting space availability	1.51%	-0.35%	1.38%	0.44%	1.30%
2022 meeting space availability	-1.34%	-0.12%	-0.25%	-2.08%	4.30%

Property Type Usage

As a percent of meetings

Mid-tier properties continue to be the most popular property type across all regions, followed by luxury and resort properties, and non-traditional meetings facilities.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Resort properties	18%	9%	22%	14%
Luxury properties	19%	13%	16%	15%
Mid-tier properties	44%	48%	25%	34%
Lower-tier properties	8%	10%	12%	13%
Nontraditional meetings facilities	10%	21%	18%	18%
Cruises	1%	1%	7%	6%

Contributors

In addition to the meetings and events professionals from around the world who completed the American Express Meetings & Events August and September 2020 survey, the following contributors provided their expertise and perspective for this Forecast:

Michael Balyasny, Attendify
Duncan Bureau, Etihad Airways
Paul Cavanaugh, Altitude Management
Sue Cavanaugh, Altitude Management
Amy Garrick, LEWIS
Frank Passanante, Hilton
John Pino, miMeetings
Bryan Reid, Altitude Management
Matt Robbins, LEWIS
Scott Webb, Webb Productions

American Express Meetings & Events

Emma Bason
Agnès Benveniste
Tracey Boreham
Amanda Chamov
Hervé Mattan
Linda McNairy
Jennifer Nelson
Roberto Ortiz
Milton Rivera
Patrick Rush
Harald Spohr
Gerardo Tejado
Sandra Zanardi



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The screenshot shows the Attendify virtual event interface for the "Omnichannel Conference" on September 4-6. The main video player features a speaker, a man with glasses and a red shirt, with a "Hi!" speech bubble. Below the video, the title "Data optimization in an ever more complex world" is displayed, along with the time "September 4, 10:00am - 11:00am" and tags "Data Strategy" and "Digital Channels". A "Speakers:" section is visible at the bottom. On the right, a "People" list shows 651 attendees, including Amy Hawkins, Angela Francis, Ashley Jones, Jane Andrews, Jorge Robertson, Regina Cooper, Richard Colman, Rosemary Edwards, Ryan Peterson, Ted Flores, and Sharon Johnson. The interface includes a search bar, a "Show List" button, and a "tt" logo in the bottom left corner.

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