



MEETINGS & EVENTS

2022 Global Meetings and Events Forecast





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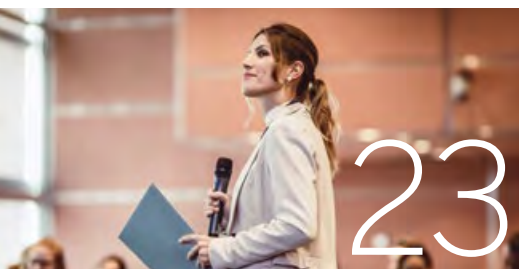
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Re-Imagining Meetings and Events for a New Era

Dear Readers,

I am pleased to present our 2022 Global Meetings and Events Forecast. This is our 11th year providing data-driven insight into the future of our industry. Over the years, our annual Forecasts have helped to shed light on how meeting professionals were coping with a range of situations, including the years following the 2008/2009 recession, the explosive growth of strategic meetings management programs, the infusion of technology and innovation, a global pandemic, and now **a thoughtful re-imagining**.

The design of this year's Forecast has been updated to visually reflect the survey data more clearly. To improve readability, we have included more infographics and tips on how to apply the information.

From a global perspective, **our industry is overwhelmingly optimistic and anticipates that most meetings and events will have an in-person component in 2022**. We are witnessing a pent-up demand come to fruition, with meetings being booked just as soon as government restrictions and corporate policies allow.

Vaccinations are a critical component of a full recovery. The list of countries with vaccine mandates for certain professions continues to grow. We are also seeing many large events require proof of vaccination to gain entry, without the option to provide a negative Covid-19 test. These milestones, along with other health and safety measures, should lend clarity within corporate travel and meetings policies and help meeting attendees feel more confident when attending in-person meetings and events.



GERARDO TEJADO

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

While our industry embraced virtual meetings last year out of necessity, there is no substitute to meeting face to face. In-person meetings are essential for the collaboration, innovation, relationships, and trust needed to achieve collective goals. With many employees continuing to work remotely, companies are challenged to keep their teams engaged and productive; they have realized the value of bringing together scattered coworkers for experiential meetings and team bonding. We see this in the growth of internal meetings reported by our global survey respondents.

But despite the uptick in in-person meetings and events, virtual and hybrid formats are by no means going away. In fact, they are expected to play a key role moving forward. Virtual technology is now seen as a valuable enhancer. Adding a virtual component to an in-person meeting allows meeting owners to accommodate attendee preferences,

broaden their audience, and even provide a contingency plan should the entire meeting need to be transitioned to virtual. As planners are now more familiar with the possibilities and limitations of technology, it is becoming clear that some meeting types are better suited than others for the virtual format – particularly those that don't require two-way engagement, such as some trainings or shorter meetings.



In-person meetings are essential for the collaboration, innovation, relationships, and trust needed to achieve collective goals.

Survey respondents in every region told us that their budgets, the number of meetings they are planning and the number of attendees they are expecting to see face to face are going up in 2022. The clear priority is to get back to in-person meetings as quickly as possible, although when that will happen in each region depends on a wide range of pandemic-related factors including changes to government restrictions and travel guidelines. In the short term, local and regional travel will dominate, as planners contend with government regulations that are still in flux. Attendee wellness continues to play a

central role in meeting planning, and experts say that this is not a passing trend – the focus on the individual will continue well beyond the pandemic and is expected to transform the attendee experience, from the minute attendees walk out their door until they arrive back home.

In line with macro trends, meeting professionals said their organizations are increasingly considering sustainability and diversity, equity and inclusion (DE&I) as part of their foundational planning. There is global consensus that sustainability must be a key factor in meeting programs, and a growing understanding that choosing inclusivity and equity creates more opportunity.

Ultimately, in this new era of meetings and events, the meeting professional is tasked with not only being an authority on all end-to-end logistics and creating memorable attendee experiences, they also now have a long list of other important responsibilities, including coordinating the virtual components of the event, incorporating duty of care into all sourcing decisions, and advising customers on sustainability, DE&I, and return on investment. To that end, this year's Forecast includes special sections that take a look at two important topics: how to be even more flexible with meeting plans and how to measure return on investment for meetings. *Be Ready for Anything: Lessons From the Pandemic* offers practical tips and questions to ask during the planning process to identify any potential gaps and figure out solutions in case your plans need to change quickly. *The First Steps to Measuring Meeting ROI* provides advice from our Account Management team on how to get started collecting metrics for your own meetings program, and shares the results of a pulse-check survey of our customers that assessed their current level of ROI adoption (or lack of).

While we are all eager to get back to pre-2020 activity levels, we recognize that recovery may not be a straight line and may require a different approach from what we've done in the past. As we look to 2022, we expect the optimism, resourcefulness, and innovation we've seen within the meetings and events industry over the past two years to continue to grow. While plenty of variables remain, our industry has acquired the necessary perspective, technical skills, and endurance to thoughtfully retool our approach. And I believe that through these hard times, we, as an industry, have built a deeper appreciation for our relationships – both personal and professional. We are stronger together, and I am truly excited to see what the next year brings.

Saludos,
Gerardo Tejado

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



Responding to the Demand for Change

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

This essential annual Forecast comes at an exciting, challenging and pivotal time for travel and meetings. Organizations have huge appetites for getting out there and meeting face to face, to nurture and build relationships with clients, prospects, and partners – and to strengthen bonds with their own people.

The Forecast reveals strong awareness of the value of internal interactions to build the cohesion, collaboration, innovation, and trust needed for success. This is great news for company culture, and of course for the travel and meetings sector.

But the world has changed, and people want to do things differently.

Employees, clients, and partners want to be confident they're working for and with organizations that are responsible, sustainable, and inclusive. We're seeing this demand, and we're supporting customers in building more sustainable travel and meetings programs with ethical, diverse supplier databases.

The pandemic has changed the relationship between companies and their employees. Employers' duty-of-care responsibilities for physical and mental wellbeing have expanded, while work and travel patterns are changing. The travel and meetings functions are being elevated and are increasingly integrating with wider employee and mobility programs and policies.



Businesses and their employees recognize that travel and meetings generate a wide range of benefits

This holistic view of organizations' strategies also underscores the impetus towards a more joined-up approach to travel and meetings – we're seeing increasing interest in this from customers. The potential outcomes are more sharply in focus in the new landscape, including enhanced efficiency, visibility, reporting and analytics, risk management, duty of care, and return on investment.

Both research for this Forecast and wider travel research by GBT reveal that businesses and their employees recognize that travel and meetings generate a wide range of benefits – from profit, revenue, growth, and productivity to engagement, culture, creativity, talent attraction, and career development.

I hope you find this Forecast a useful resource. It is heartening to find in it both optimism and readiness for change. I hope that all of us – as people, as professionals, as buyers and sellers of travel and meetings services – can embrace that change as we work together to create a better way forward.



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everyone else's
back, so we
have yours.**

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Hilton EventReady Playbook. The Hilton EventReady Playbook is a global resource designed to provide event professionals with guidance and solutions for engaging, safe and socially responsible events. Access the playbook at HiltonEventReadyPlaybook.com.

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Global Activity



A Fresh Start for a Revitalized Industry

The 2022 Forecast is based on a June-July 2021 survey of 500 meetings and events professionals from around the world, and interviews with industry experts. Respondents represent corporations, associations, buyers, and suppliers from five continents and 31 countries. The result is a global picture of expectations for the 2022 meetings and events industry.

Meetings Activity

It's been a year of stops and starts for meetings and events since the last Forecast. In that time, the industry has undergone a rapid maturation to take on the challenge of planning events during a pandemic. Meeting professionals say they are now well equipped to adapt to any ongoing uncertainty and they feel confident in their ability to plan high quality meetings and events, whether face-to-face, hybrid or virtual. They have embraced technology and are excited about new areas of focus.

In fact, the dominant message from our survey respondents is that meeting professionals do not want or expect to go back to the way things were once the pandemic is over. As one respondent explained, they are most looking forward to "leveraging the lessons learned during 2020 and 2021 to increase the effectiveness of the pent-up demand for face-to-face meetings. This incorporates deeper focus on the individual needs of attendees, mindfulness/wellness, enhanced use of technology, and greater focus on the content design." In-person meetings will be the priority – that will not change – but the planning process will be more thoughtful and holistic than in previous years.

Our survey respondents and interviewees have a realistic, and positive, view on how the industry recovery will proceed over the next few years. Most believe that the number of in-person events will return to pre-pandemic levels within one to two years. However, the recovery may not be a smooth, straight line, so flexibility in meeting planning remains key, as restrictions and regulations are still in flux in many regions.

Meeting Prevalence

It is worth noting that in the time between the survey and the release of this Forecast, there have been some relaxations in travel restrictions internationally, and some new

Global Activity

Opening Up ... Thoughtfully

Lessons learned during the pandemic are expected to be put to good use. Budgets are increasing and face-to-face meetings are returning – with some caveats.

Policies are becoming more explicit

Respondents say their organization's meeting policy has explicit language about:

65% safety and security

47% virtual/hybrid specific policies

44% health and wellness

26% meetings ROI metrics

Budgets are increasing



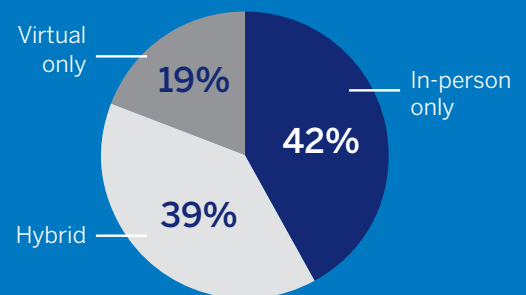
say their overall meeting spend is increasing in 2022



say it is staying the same

And we're going to see more of each other

81% of meetings in 2022 are expected to have a face-to-face component



Finding enough space will be a challenge

The top two factors, other than Covid-19, that influence a meeting location selection:

35% 
6ft ↔ 2m

size of meeting space to accommodate physical distancing

25% 

ability of the site to host hybrid meetings

We're tackling digital fatigue with fun

How do you keep your virtual and in-person attendees engaged?



45%

entertainment, polls, activity, and games



31%

food and beverage experiences (delivered to virtual attendees)



17%

wellness activities

domestic restrictions imposed. Our respondents are confident that the industry will have a strong recovery, and these predictions represent their best estimates when they took the survey.

Almost two-thirds (64%) of global respondents said they have in-person events booked for 2021, and 21% had already resumed at least some in-person events at the time of the survey.

Internal team/training and small and simple meetings (whether in-person, virtual, or hybrid) are expected to account for almost half (47%) of all meetings next year. This is consistent with last year's findings and reflects the need for organizations to keep up with training and engagement of their remote workforces.

Not surprisingly, respondents say the number of in-person meetings held in 2022 will be higher across all meeting types than what respondents predicted for 2021, ranging from an increase of 2.9% more incentives and special events to 4.5% more internal team/training meetings. Virtual and hybrid meetings are all expected to increase too, including 2.5% more conferences and trade shows, and 3.1% more product launches.

The number of attendees at in-person events is expected to increase for every meeting type, by 3.5% to 4.3%. The number of attendees at virtual and hybrid events is also expected to increase across the board, although by a smaller percentage – by 2.8% to 3.4%.

The average meeting length for in-person events is expected to be slightly longer overall than it was last year, with the shortest being small and simple meetings (1.7 days) and the longest being incentives and special events (3.1 days). Meeting length for virtual and hybrid events is measured in hours, with conferences and trade shows expected to be the longest at 7.1 hours on average, a decline from 7.8 hours last year, and small and simple meetings averaging 2.7 hours, down from 3.1 hours.

Meeting Spend

Overall meeting spend is predicted to increase by 3.1% on average, although 20% of North American respondents said they expect their budgets to increase by 11% or more. The cost per attendee for all meeting types, in all formats, is predicted to increase as well, by 2% globally.

The cost per attendee per day for in-person meetings ranges from a low of \$484 for small and simple meetings to a high of \$851 for incentives and special events (in US dollars). For virtual and hybrid meetings, the cost per attendee per day ranges from \$501 for small and simple meetings to \$776 for incentives and special events.

If budgets were reduced by 10%, the top two areas that respondents would cut first would be off-site optional activities (22%) and number of nights (20%). Conversely, if budgets were increased, 28% said they would use the extra funds to improve the on-site experience, and 27% said they would increase the use of technology.



Our respondents are confident that the industry will have a strong recovery

Hotels and Meeting Space

After occupancy rates hit historic lows worldwide in April 2020, the hotel industry is rebounding. Many of the changes that were put in place during the pandemic are expected to stay for the future, including enhanced cleanliness protocols and flexible cancellation policies. The major brands are also integrating better on-site technology to enable hybrid meetings and delivering more personalized attendee experiences.

Most of our survey respondents expect hotel group rates to increase in 2022, although by how much differs by region. Global hoteliers predict an increase of 2.3%, while regionally, respondents in Asia Pacific expect to see the lowest increase, at 1%, and those in North America expect the highest, at 5.1%.



Room availability is predicted to increase by 2.2% in 2022, and 3.7% in 2023. Respondents expect meeting space availability to follow a similar trend, with an increase of 2% in 2022 and 3.9% in 2023.

The top two factors influencing meeting location selection are “size of meeting space to accommodate distancing” (35%) and “ability to host hybrid meetings (e.g., Wi-Fi bandwidth, skilled A/V staff)” (25%). It is clear that while venue availability is expected to increase, the demand for appropriate space will likely make sourcing more difficult than expected. Industry professionals also point to global staffing shortages as a challenge facing all suppliers.

Global Air

The global airline industry is slowly rebounding after an unprecedented year, and although many routes have not yet returned, more are coming back every month. Like every other industry that relies on global business travel, airlines have had to adapt. One airline supplier survey respondent said their company is changing its group air program to better serve meeting planners’ needs by offering “more customization for specific verticals; meeting contracts aligned with specific needs such as inclusion of bulk baggage for production travel; or incentive offers like club passes or extra miles.”

On average, 53% of meetings next year are expected to include group air bookings; 57% of those bookings will be done through an online tool. Crisis management and favorable rates are still the top two features that respondents most value in their group air provider.

All respondents predicted that group air rates will increase, with global air suppliers predicting the largest increase at 5.3%. Regionally, respondents in North America expect an increase of 5.1% in rates, respondents in Asia Pacific expect the lowest at 1.6%, and those in Europe and Central and South America are in between.

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Global Trends



There's No Substitute for Face to Face

In-person meetings are vital. Businesses have always known this, but the pandemic has really driven the point home. For many types of meetings and events, there is just no substitute for being in the same room with other people – the energy and creativity that come out of a shared experience are impossible to replicate virtually. And it's not just about sales or productivity; it's a challenge to keep employees engaged when everyone is separated. Organizations are now understanding the valuable role face-to-face meetings play in connecting a dispersed workforce. As Linda McNairy, vice president Americas, American Express Meetings & Events, explains, "It's really hard to drive culture in a non-face-to-face environment."

However, hybrid and virtual meetings are here to stay, and have revealed some advantages. Whether it's due to travel restrictions, budget cuts, or reducing carbon footprints, gathering people together virtually will remain a valid option post-pandemic. And there's no denying that organizations that provide a virtual option to attend their events are able to reach wider audiences who, for a range of reasons, cannot attend in person.

Meeting professionals have had the opportunity to develop innovative tools and processes that are increasing productivity. There is a new acceptance of using technology that will drive further inclusion and higher numbers of attendees. These improvements are going to catapult the meetings and events industry forward.

Patrick Rush, senior regional director Asia Pacific, American Express Meetings & Events, says, "We're going to see a lot more solutions arise as technology continues to evolve. We've worked in partnership with our customers and suppliers to identify opportunities to innovate."

Global Trends



Anchored by safety and flexibility

To get back to in person, respondents say the two most important factors are:

58%



Confidence in duty-of-care components for attendee health and safety

55%

Supplier flexibility

And led by internal meetings

The top 3 meeting types with the largest projected growth in 2022

1.

Internal team meeting/training

2.

Small/simple meeting

3.

Client/customer advisory board

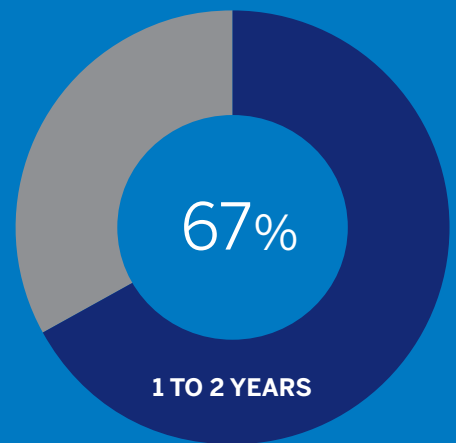
The Way Forward

After a turbulent year, our survey respondents say they are optimistic and prepared for the return of in-person events in 2022.

Pre-pandemic activity levels are in sight



Two-thirds expect in-person meeting levels to return to their pre-pandemic numbers sooner rather than later



Comfort with technology is increasing

In the meantime, planners have increased their tech know-how



73%

are very optimistic about their ability use technology to enhance the meeting experience vs. 61% in 2021

And sustainability matters more than ever



83%

of organizations take sustainability into account when planning meetings and events

Destination Choices

Local tourist boards are pushing governments to set up travel bubbles that will allow people to cross borders without requiring quarantine. While this is mostly geared to leisure travelers, it will allow meeting planners to broaden their scope when they are considering where to hold events. As more countries and regions implement vaccine passports, the ability to cross borders is expected to increase. Many countries are now seeing the benefit of the vaccine roll outs. Where travel is permitted, people are traveling. A science-based and data-driven approach can empower governments to ease travel restrictions while prioritizing public health.

In the meantime, local and regional travel is expected to dominate due to government and travel restrictions. Organizations are adjusting their plans by, for example, replacing a national sales meeting with five regional meetings. So while there may not be as much long-distance travel, people will be meeting in person again, and on a more regular basis.

Two-thirds (67%) of survey respondents believe that in the next one to two years, in-person meeting levels will return to their pre-pandemic numbers. When asked to name their top two factors, aside from Covid-19 restrictions, that would influence future in-person event planning, 58% chose confidence in duty-of-care components for attendee health and safety; 55% chose supplier flexibility to adapt to the customers' meetings and events requirements.

Attendee Wellbeing

Managing attendee health and wellness, while always important, is now job number one for meeting planners. Attendee engagement is still a focus, but duty-of-care considerations are paramount.

There has been an increased focus on the attendee as an individual – i.e., looking at the individuality of attendees, identifying the ideal experience for them, and accommodating their needs. Not everyone is comfortable in groups of people, so it's important to make those attendees feel that they

Using Attendee Personas to Drive Engagement and Value



Attendee engagement strategies that worked pre-2020 might not be applicable in the context of today's health and safety concerns and the increased use of virtual and hybrid meetings. Personas can help meeting professionals understand their audience and deliver a successful event that resonates and drives behavior change.

Personas are general characterizations of your audience members. They provide a way to encapsulate things like common behaviors, interests, challenges, and fears using fictional people – for example, the Ninja Networker, or the Social Butterfly Gone Wild. Since we're all multi-faceted individuals, it's unlikely that one single persona can capture an attendee's full spectrum of thoughts and emotions. However, for the purpose of meeting design, personas can help planners understand their attendees' primary motivations and characteristics in order to tailor their events to meet them.

Find out more about using personas in "Understanding Your Attendees: The New Persona Ecosystem for Meetings & Events" (<https://www.amexglobalbusinesstravel.com/meetings-events/research-insights/>).

can participate and engage in a way that supports the meeting's objectives. That may mean creating more scheduled time for "brain breaks" and renewal. Typical meeting schedules used to be packed with programming, without enough attention paid to how that churn can affect the human psyche.

As far as engagement, with the new implementation of technology, "the sky is the limit," says Ariana Reed, senior manager of business strategy, American Express Meetings & Events. "There's endless opportunity for planners to make the most of the engagement tools available."

Nearly half (45%) of respondents said that the best type of experience to encourage engagement among virtual and in-person attendees is entertainment. Three in 10 (31%) named food and beverage experiences, which can be delivered to virtual attendees.

Once in-person events are back to previous years' levels, though, and the excitement of seeing each other face to face has lessened, the challenge will be to create FOMO (fear of missing out) for in-person events. There is no doubt that for many people, remote working will continue. How will you motivate those people to leave the comforts of their homes for your meetings and events?

Hybrid and Tech

The explosion of technology options for meeting planners has fundamentally changed the industry. Through several years of monitoring mobile app use through our annual survey, it is clear that mobile apps have proven their value. What once may have just been used to provide information during an event now has a lifespan that includes pre-event registration and health screening, integration with hotels and airlines for touchless check-ins, food and beverage services, transportation, and seating charts. Technology that supports the attendee experience is becoming more accepted, as long as planners are transparent up front about their implementation and provide attendees with the ability to opt out. The tech is wide-ranging and will no doubt evolve over time. Some of the most common uses now include facial recognition and wearable tech that can streamline access, security and payment systems; projection mapping software that creates interactive 3D displays in unusual places or surfaces; and artificial intelligence (AI) engines that can suggest the appropriate seminars or networking events for attendees based on their badge scans, social media info, and other metrics. That's not to mention the analytics apps that can help event owners understand attendee behaviors and measure return on investment for their meeting programs.

Events professionals are even more optimistic than last year about their ability to incorporate technology to enhance the meeting experience in 2022. Nearly three in four (73%) rated their ability to do so as an 8 or above (on a scale of 1 to 10). This is a substantial increase from last year, when 61% said 8 or above.

Air and Hotel Sectors

Beyond the current environment, three trends are expected to persist in the hotel and air sectors: safety and wellness; sustainability; and digitalization (contactless check-in/out and payments).

Duty of care continues to be the priority. Air and hotel suppliers must have strong contingency and disaster-recovery plans in place, as well as flexible contract terms and cancellation policies in case of changing pandemic restrictions or natural disasters. Interviewees told us that their clients have a heightened need to understand where their travelers are at all times. As a result, interviewees said they are seeing an increased interest in implementing travel security tools such as International SOS and WorldAware, which provide 24/7 monitoring and risk analysis across intelligence areas including health, terrorism, environment, transportation, geopolitics, and more.

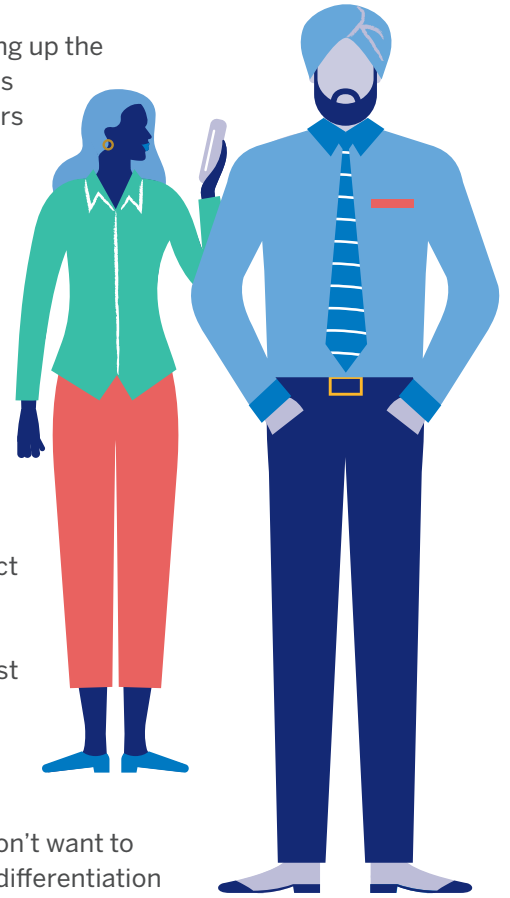
Employee wellbeing and creating a culture of belonging have been climbing up the corporate agenda for years. Post-Covid, the safety component of wellness of travelers will remain important for the air and hotel industry, as travelers will continue to want to feel safe and comfortable with cleaning and physical distancing practices.

Another key trend is sustainability, in particular the accelerated demand to prioritize carbon-conscious programs. The path forward will focus on delivering carbon efficiency in travel. For airlines, that may mean providing detailed carbon footprint reports for each traveler, forming partnerships with carbon offset programs, or increasing the use of sustainable aviation fuel. In some cases, hotel chains are participating in carbon-neutral or net-zero programs, but in many cases they are self-monitoring. Other measures may include minimizing water usage, reducing food wastage and food miles – and single-use plastics – as well as offering eco-friendly menus and low-impact food types, and using ethical, local producers. Green certification for hotels and meeting spaces, certified by a third-party provider like Green Key Global, can drive meaningful results for clients and hotels and, in most cases, will increase revenues.

The third trend that will continue post-Covid is the digital transformation of the traveling experience. Contactless payment and check-in have drastically changed travelers' expectations – people don't want to wait in line anymore to check in for keys or cards. Digitalization will drive differentiation and incremental benefits to organizations that embrace and implement it, increasing satisfaction to travelers and revenues to hotels.

In addition to these future-facing trends, leading airlines are responding to the current situation by putting much more focus on the customer experience, to get travelers excited about flying again. Options range from eliminating change fees and providing much more transparency regarding delays and flight changes to partnering with Covid-19 testing suppliers. The goal is to make the entire travel experience smoother and more enjoyable from the time the customer leaves their home until they arrive at their destination.

Likewise, leading hotel chains are adjusting to rapidly changing guest expectations. Offering programs such as free cancellations and free attrition makes the sourcing process easier for meeting professionals. Chains are investing in and implementing more robust technology solutions, increasing bandwidth and in-house expertise, and in some cases even providing studio spaces for on-site production for hybrid events.



Meetings Management

Meetings management policies are adapting to become more granular and incorporating decision trees: for example, what is the purpose of the meeting, who is the audience, can it be virtual only, can it be hybrid? If there is a virtual component, what technology is the best one to use?

Professionals explained that early in the pandemic many virtual meetings planned outside of meetings departments were not being registered. They note that now policies are becoming more granular regarding virtual and hybrid meetings, sustainability, diversity, and small and simple meetings.

Processes need to be created that are company-wide and repeatable. That includes collecting more metrics about every aspect of a meeting or event. Organizations that have good data visibility and robust analytics are able to make better-informed decisions about which events they focus on and where to spend their money and attention.

Hervé Mattan, vice president EMEA, American Express Meetings & Events, explains, “It’s a key theme for clients: they want to make sure they get the ROI for individual meetings. We are in a learning curve right now, but as more organizations realize that they need to collect this data, it will become standard practice.”

Diversity, Equity & Inclusion

Diversity, equity and inclusion (DE&I) are growing considerations for meeting planners globally. Industry professionals say they are seeing concerted efforts to incorporate diversity into meetings programs, at the overall program level and at the event level.



Organizations that have good data visibility and robust analytics are able to make better-informed decisions

At a program level, that means a focus on supplier diversity. A diverse supplier is generally defined as a business that is at least 51% owned by an individual or group of a diverse designation; categories include enterprises that are minority-owned, woman-owned, or veteran-owned, and small-business and social enterprises. A challenge for planners is that there is no central repository of diverse suppliers, so everyone is having to build their own lists. Ariana Reed says that this lack of a database is a “big opportunity” in the market: “Some countries have government support for clients who use diverse-certified suppliers. Clients want to know that companies are certified.”

At an event level, diversity includes things like asking attendees during registration what pronoun they use, making sure that there is a diverse mix of speakers who reflect the audience demographically, and incorporating elements of local culture when appropriate. Attention to equity and inclusion supports attendees’ feeling of belonging, and may include providing simulcasts for the hearing impaired, using venues that are fully compliant with accessibility requirements, and factoring in breaks in programming for religious requirements. Hybrid meetings support inclusion by allowing people who aren’t able to travel to participate in meetings in a meaningful way.

Sustainability

Our survey respondents say that most meeting policies now include sustainability requirements.

Beyond reducing waste and choosing not to provide gift bags or paper agendas, planners are increasingly expected to be able to calculate the carbon footprint of a meeting (in-person, virtual, and hybrid) to determine whether it will fit their policy. Although this information is not necessarily readily available, some forward-thinking airlines and hotels are developing programs that will offer it all the way down to the attendee level.

Location choices are also expected to take sustainability into account. For example, if 80% of attendees are in the Chicago area, why would the meeting take place in New York?

As Milton Rivera, vice president global business development, global client group and APAC region, American Express Meetings & Events, says, “Many of the conversations we’re having now were applicable before the pandemic but not everyone necessarily wanted to hear it. But organizations have realized they need to address sustainability and diversity now and understand how they can contribute to a broader corporate strategy.”

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Regional Trends



Shared Optimism for a Busy Year Ahead

Through the course of interviews with industry experts, we heard the same message over and over: we want to be together and meet face to face, but we will not go back to the way things were before the pandemic. Our survey responses bear this out. Remote working is here to stay, even in regions that traditionally had very little cultural acceptance of it pre-2020. Because of this new distributed workforce, virtual and hybrid meetings are also here to stay, and meeting professionals have learned how technology can be used effectively and efficiently for certain types of meetings. The global focus on sustainability means that organizations must be more thoughtful about where and how often they expect their employees to travel.

At the center of these changes is an increased respect for the needs of the individual, something that until recently was not a priority in many C-suites. Meeting professionals have always factored attendee engagement into their programming, but attendee wellbeing is now as important, if not more.

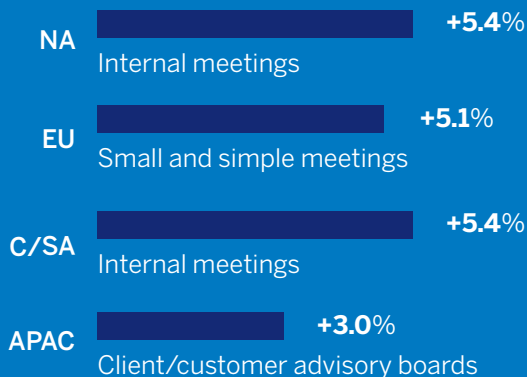
Regional Trends

Recovery and Renewal

Survey respondents were generally in agreement about their expectations for the next few years, but a few questions highlighted some regional differences in their approach.

Internal meetings are expected to have more attendees

What type of in-person meeting is expected to have the biggest increase in attendees (year over year)?



A positive outlook

How optimistic are respondents about the health of the meetings and events industry in 2022?

Percent of respondents who chose 8 or higher on a scale of 1 to 10:



A fast return to in person

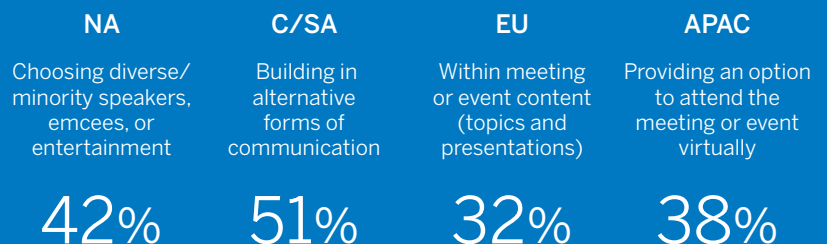
When will in-person events return to pre-pandemic levels?

In the near future (1 or 2 years):



Diversity is a priority, and there are different ways to achieve it

Over 80% of respondents globally say their organizations actively strive to incorporate diversity, equity and inclusion into their meetings and events. The number one way they will achieve it varies by region though.



Note: NA-North America; EU-Europe; C/SA-Central and South America; APAC-Asia Pacific

Source: North American, European, Asian Pacific, and Central/South American Surveys from American Express Meetings & Events, 2021.

North America

Meeting professionals in North America are feeling positive, expecting that 2022 will bring a strong recovery to the industry. At the time of the survey, 74% said they would rank their optimism level as 8 or higher on a scale of 1 to 10. The region was also the furthest ahead as far as resuming in-person events, with 31% of respondents saying they had already resumed in-person events at the time of the survey. In addition, they are the region that is most likely to have in-person events scheduled for 2022 (54%).

Meetings Activity

North American respondents are predicting an increase in every type of meeting in 2022. For in-person events, the largest growth, when compared to predictions for 2021, is expected to be in senior leadership/board meetings, at a 6.6% increase. In the virtual/hybrid format, internal team/training meetings had the biggest expected jump, with a 4.3% increase.

More attendees are expected at every type of meeting, whether they are in person or virtual/hybrid. For in-person events, the percentage increase from 2021 ranges from 4.6% for conferences and trade shows to 5.4% for internal team/training meetings. For virtual/hybrid events, the expected increase in attendees ranges from 2.0% for incentives to 3.3% for client/customer advisory boards.

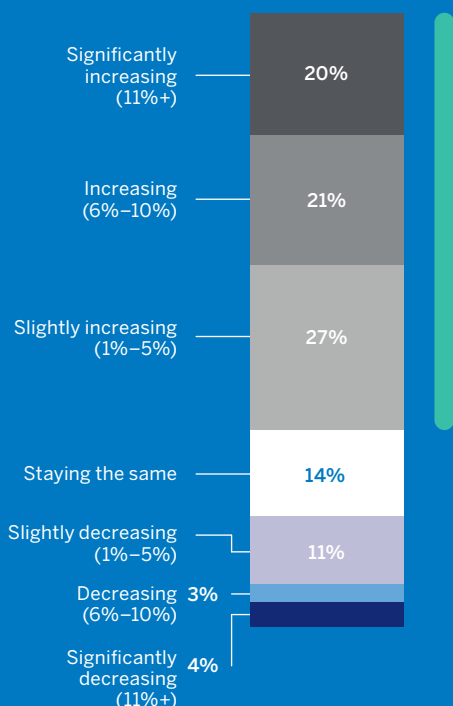
Respondents in the region are split on their predictions about hotel room availability in 2022, with almost half predicting it will increase and half predicting it will decrease. As a result, the expectation is that hotel availability will be flat, increasing by only 1.0% from 2021. Meeting professionals are much more optimistic about hotel availability in 2023, predicting a 2.7% increase.

Predictions for meeting space availability in 2022 are similarly divided in the region, with a fairly even split between those who think it will decrease and those who think it

North America – Key Indicators for 2022

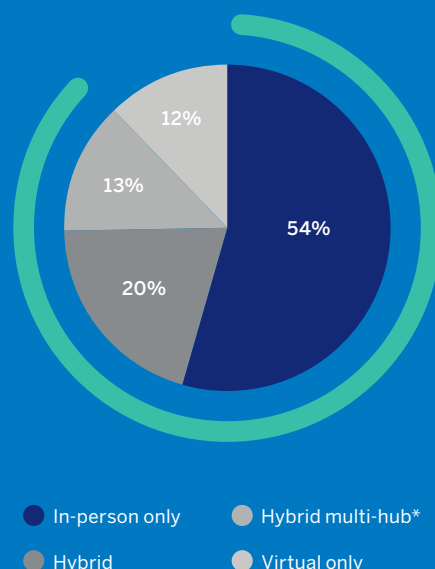
Overall meeting spend

68% expect their meeting spend to increase



Meetings by format

88% of meetings will have an in-person component



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

Source: North American Survey from American Express Meetings & Events, 2021.

will increase. Overall, respondents believe that availability will stay flat in 2022, at 0.7%, and increase to 2.1% in 2023.

Meetings Budgets and Planning

Survey respondents were asked to break out their expected cost per attendee per day (US dollars, excluding air costs) by meeting type and meeting format (in-person, virtual/hybrid). Meeting professionals in North America predict that incentives and special events will have the highest cost per attendee in both formats, at \$888 for in-person and \$786 for virtual/hybrid. Small and simple meetings will account for the lowest cost per attendee per day, for both in-person and virtual/hybrid formats, at \$475 and \$568, respectively. It's notable that respondents expect virtual/hybrid small and simple meetings to incur higher costs than in-person ones; this is likely due to the additional cost associated with using a technology provider.

Overall meeting spend is expected to be up by 4.2% in the region, which is a significant jump over 2021 levels, and is the largest predicted increase of all regions surveyed. However, respondents in North America also expect an increase of 5.1% in group

hotel rates and a 5.1% increase in group air rates. Whether the increased budget will be enough to offset these expected rate increases is unclear. Respondents said that if their budget were reduced by 10%, the first area they would cut for in-person events would be off-site optional activities, followed by the number of nights, and then the use of a destination management company.



I am most excited about...

“Seeing the continued growth in the industry, with many innovations implemented for in-person activities.”

Meeting planner in
North America

Almost three-quarters of respondents (72%) said their organization has adopted a formal policy for meetings, and 78% said there is an approval process in place for meetings. Safety and security requirements is the component most likely to be explicitly mentioned in an organization’s meetings policy, followed by the use of preferred suppliers.

We asked survey respondents to rank the most important factors for planning an event during Covid-19. North America was the only region that didn’t rank “vaccination cards/proof of receiving vaccines” as their first choice – in fact, 31% of respondents said it was the least important factor of the five options given. They instead chose the following as more important factors: complying with health guidelines, making sure attendees have not been exposed to Covid-19 prior to a meeting, having a large enough space for physical distancing,

and temperature checks and health screening. At the time of the survey (June-July 2021), it did not appear that most governments in the region were considering implementing vaccination passports, which may explain the low ranking.

Top Destinations

The top 5 meeting destinations in North America, based on client data from the American Express Meetings & Events Meetings Insight platform, indicate that meetings owners are keen to take advantage of the options available in large urban centers for their in-person events.

1. New York City, New York
2. Tampa, Florida
3. Atlanta, Georgia
4. Las Vegas, Nevada
5. Phoenix, Arizona

Source: Top North America city destinations based on sales of event services by American Express Meetings & Events Oct. 2020—Sept. 2021.



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Europe

Meeting professionals in Europe are guardedly optimistic about what 2022 will bring. More than half (59%) said they would rank their optimism level as 8 or higher on a scale of 1 to 10. Nearly 81% of all meetings and events are expected to have an in-person component. The percentage of in-person events next year is expected to be 48%, which is the second highest of all regions. And although respondents predict a slower recovery than respondents in other regions, 86% were confident that in-person attendee numbers will return to pre-pandemic levels within five years.

Meetings Activity

European respondents are predicting an increase in every type of meeting in 2022. For in-person events, the largest growth, when compared to predictions for 2021, is expected to be in small and simple meetings, at 5.9%. In the virtual/hybrid format, small and simple meetings also had the biggest expected jump, at 3.2%.

More attendees are expected at every type of meeting, whether they are in person or virtual/hybrid. For in-person events, the percentage increase ranges from 2.8% for incentives to 5.1% for small and simple meetings. For virtual/hybrid events, the expected increase in attendees ranges from 1.0% for senior leadership/board meetings to 2.5% for client/customer advisory boards.

The majority of respondents in the region expect hotel room availability to increase in the next few years, by 2.3% in 2022 and 4.1% in 2023. Predictions for meeting space availability are also optimistic, with respondents expecting a 1.7% increase in 2022 and a 4.0% increase in 2023.

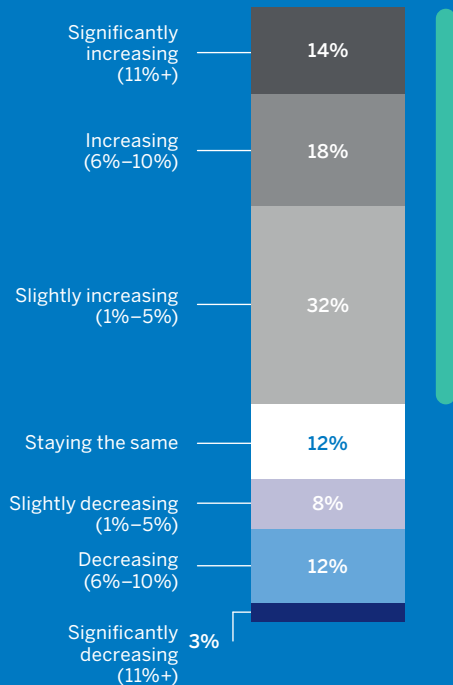
Meetings Budgets and Planning

Survey respondents were asked to break out their expected cost per attendee per day (US dollars, excluding air costs) by meeting type and meeting format (in-person,

Europe – Key Indicators for 2022

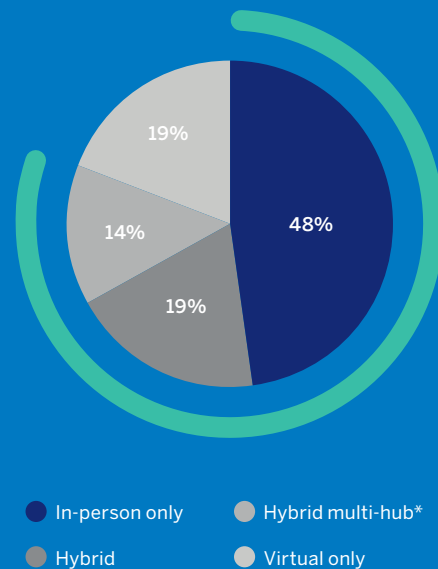
Overall meeting spend

64% expect their meeting spend to increase



Meetings by format

81% of meetings will have an in-person component



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

Source: European Survey from American Express Meetings & Events, 2021.

virtual/hybrid). Meeting professionals in Europe predicted the lowest cost per attendee per day of all regions for every virtual/hybrid meeting type and most of the in-person meeting types. Incentives and special events are expected to have the highest cost per attendee in both formats, at \$793 for in-person and \$736 for virtual/hybrid. Small and simple meetings will account for the lowest cost per attendee per day, for both in-person and virtual/hybrid formats, at \$475 and \$459, respectively.

Overall meeting spend is expected to increase by 2.9% in the region. Respondents in Europe are predicting a modest increase of 1.6% in group hotel rates, and a 2.4% increase in group air rates. They say that if their budget were reduced by 10%, the first area they would cut for in-person events would be off-site optional activities, followed by the number of nights, and then off-site evening events.

More than two-thirds of respondents (69%) said their organization has adopted a formal policy for meetings, and 71% said there is a policy that covers small and simple meetings. Safety and security requirements is the component most likely to

be explicitly mentioned in an organization's meetings policy, followed by the use of preferred suppliers.

Meeting planners in Europe are the most likely to say their organization does not use mobile apps (27%). When asked what the most compelling reasons are to use a mobile app, 51% said their number one use was to communicate with attendees regarding changes – a reason that no other region had in its top three.



I am most excited about...

“After so many restrictions by Covid-19, that things are returning to normal. Technology will always be our ally, as it was at the most critical moments of the pandemic and will be in the coming years.”

Meeting planner
in Europe

Planners in the region are also the most likely to say that the use of sharing-economy lodging (such as Airbnb) is prohibited by their organizations, at 25%. They also had the highest percentage of “Don’t know” responses to this question, at 25%.

Top Destinations

The top 5 meeting destinations in Europe, based on client data from the American Express Meetings & Events Meetings Insight platform, show that larger, established urban centers are still in high demand.

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

Source: Top Europe city destinations based on sales of event services by American Express Meetings & Events Oct. 2020—Sept. 2021.

Central and South America

Meeting professionals in Central and South America are excited about their industry and what will happen in 2022. A whopping 87% said they would rank their optimism level as 8 or higher on a scale of 1 to 10, and 82% believe their career options are good to excellent. Three-quarters (76%) of events next year in the region will include an in-person component. And 81% of respondents in the region said they expect in-person attendee numbers to return to pre-pandemic levels in the next one to two years.

Meetings Activity

Respondents in Central and South America are predicting more of every type of meeting in 2022, with larger increases in virtual/hybrid events than in-person. Internal team/training meetings are expected to see the biggest jump in both formats, with in-person going up by 3.7% and virtual/hybrid by 4.7%.

In line with the other regions, more attendees are expected at every type of meeting, whether they are in person or virtual/hybrid. For in-person events, the percentage increase ranges from 4.4% for senior leadership/board meetings to 5.4% for internal team/training meetings. For virtual/hybrid events, the expected increase in attendees ranges from 3.8% for incentives to 5.0% for client/customer advisory boards.

More than 70% of respondents in the region said they expect hotel room availability to increase in the next few years, by 3.7% in 2022 and 5.5% in 2023. Predictions for meeting space availability are also optimistic, with respondents expecting a 3.3% increase in 2022 and a 5.3% increase in 2023.

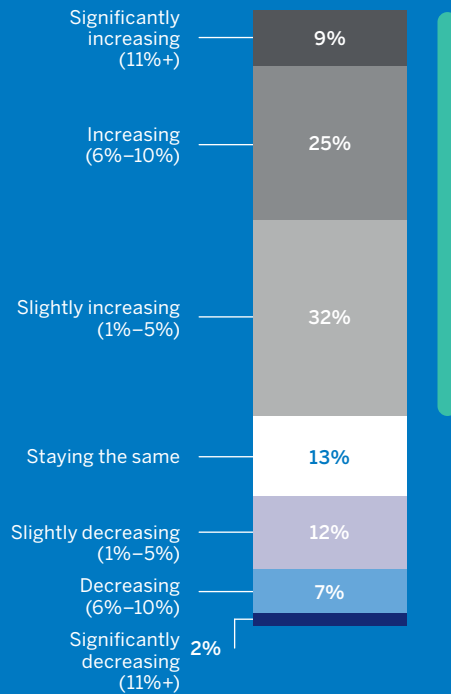
Meetings Budgets and Planning

Survey respondents were asked to break out their expected cost per attendee per day (US dollars, excluding air costs) by meeting type and meeting format (in-person, virtual/hybrid). Meeting professionals in Central and South America expect that

Central and South America – Key Indicators for 2022

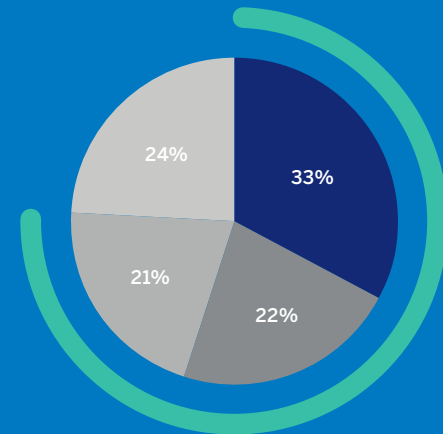
Overall meeting spend

66% expect their meeting spend to increase



Meetings by format

76% of meetings will have an in-person component



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

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

Source: Central and South America Survey from American Express Meetings & Events, 2021.

incentives and special events will have the highest cost per attendee in both formats, at \$825 for in-person and \$769 for virtual/hybrid. Small and simple meetings will account for the lowest cost per attendee per day, for both in-person and virtual/hybrid formats, at \$486 and \$466, respectively.

Overall meeting spend is expected to increase by 3.1% in the region. Respondents in Central and South America are predicting an increase of 2.8% in group hotel rates, and a 3.3% increase in group air rates. They say that if their budget were reduced by 10%, the first area they would cut for in-person events would be off-site evening events, followed by off-site optional activities, and then number of nights.

Sixty-one percent of respondents said their organization has adopted a formal policy for meetings, and 68% said there is a policy that covers virtual/hybrid meetings. Safety and security requirements is the component most likely to be explicitly mentioned in an organization's meetings policy, followed by the use of meetings planning technology. The region has the highest uptake of policies on acceptable social media use – 48% of

respondents said their organization's meeting policy covered it, compared with 28%–33% in the other regions.

More than two-thirds of respondents (71%) said their organization allows the use of sharing-economy transportation suppliers such as Uber, by far the highest of any region. They are also the region that has the highest use of mobile apps, at 88%.

When asked what factors other than Covid-19 restrictions would affect decisions about holding in-person events, 65% said confidence in duty-of-care components, 60% said supplier flexibility to adapt to the customer's requirements, and 27% said limited-time special offers (including free gifts and add-ons such as dinner vouchers, VIP lounge access, etc.).

Top Destinations

The top 5 meeting destinations in Central and South America, based on client data from the American Express Meetings & Events Meetings Insight platform, include three cities in Mexico this year.

1. Mexico City, Mexico
2. São Paulo, Brazil
3. Playa Del Carmen, Mexico
4. Bogota, Colombia
5. Puebla, Mexico

Source: Top Central/S. America city destinations based on sales of event services by American Express Meetings & Events Oct. 2020—Sept. 2021.

I am most excited about...



“Being able to create optimistic goals according to the work we have already done, and what can be improved in favor of the entire organization.”

Meeting professional in
Central and South America

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Asia Pacific

Meeting professionals in Asia Pacific are fairly positive about the health of the industry in 2022. Nearly two-thirds (64%) said they would rank their optimism level as 8 or higher on a scale of 1 to 10, and 58% believe their career options are good to excellent. Eighty-one percent of 2022 events in the region will include an in-person component. And 62% of respondents in the region said they expect in-person attendee numbers to return to pre-pandemic levels in the next one to two years.

Meetings Activity

Respondents in Asia Pacific are predicting more of every type of meeting in 2022. For in-person events, client/customer advisory boards are expected to increase the most (3.1%). In the virtual/hybrid format, internal team/training meetings are expected to see the biggest jump (3.0%).

More attendees are expected at every type of meeting, whether they are in person or virtual/hybrid. For in-person events, the percentage increase ranges from 1.4% for senior leadership/board meetings to 3.0% for client/customer advisory boards. For virtual/hybrid events, the expected increase in attendees ranges from 2.2% for small and simple meetings to 3.6% for internal team/training meetings.

Hotel room availability is expected to increase by a modest 1.6% in 2022 and 2.6% in 2023. Predictions for meeting space availability are slightly more optimistic, with respondents expecting a 2.1% increase in 2022 and a 4.0% increase in 2023.

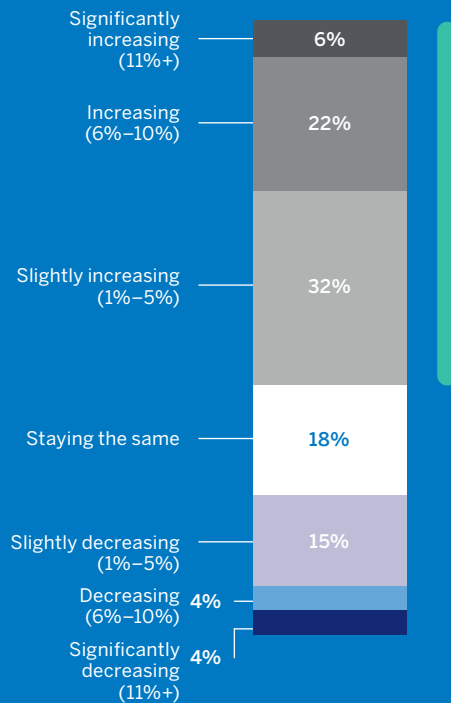
Meetings Budgets and Planning

Survey respondents were asked to break out their expected cost per attendee per day (US dollars, excluding air costs) by meeting type and meeting format (in-person, virtual/hybrid). Of all the regions, meeting professionals in Asia Pacific predict the highest cost per attendee for every meeting type and format, except one (virtual/

Asia Pacific – Key Indicators for 2022

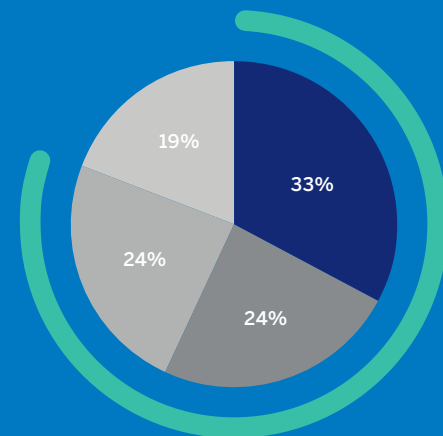
Overall meeting spend

60% expect their meeting spend to increase



Meetings by format

81% of meetings will have an in-person component



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

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

Source: Asia Pacific Survey from American Express Meetings & Events, 2021.

hybrid small and simple meetings). In-person costs range from a low of \$495 for small and simple meetings to \$926 for product launches. Virtual/hybrid costs range from a low of \$525 for small and simple meetings to \$870 for conferences and trade shows.

Overall meeting spend in Asia Pacific is expected to be virtually unchanged in 2022, with only a 0.02% increase. Group hotel rates in the region are expected to increase by a modest 1.0%, and group air rates are likewise expected to see a modest increase, of 1.6%. Respondents say that if their budget were reduced by 10%, the first area they would cut for in-person events would be the number of nights, followed by off-site optional activities, and then off-site evening events.

Sixty-four percent of respondents said their organization has adopted a formal policy for meetings, and 66% said there is a policy that covers the approval process. Safety and security requirements is the component most likely to be explicitly mentioned in an organization's meetings policy, followed by the use of meetings planning technology. The region has the highest uptake of policies on virtual and hybrid meetings and

meetings return-on-investment metrics, with 56% and 34% respectively saying their organization's policy covers those topics.

When asked what challenges they faced when conducting a virtual event in 2021, meeting planners in Asia Pacific said the biggest issues were lack of engagement, technical issues, and lack of knowledge or experience with the format or the technology. They also were the most likely to say that the virtual meeting did not achieve the meeting's objective – 29% of respondents in the region said that was a challenge, compared with 8%–11% in other regions. Virtual meetings were not widely accepted in most countries in the region pre-pandemic, and “there is no question that companies in the region want to go back to face to face,” says Patrick Rush, senior regional director Asia Pacific, American Express Meetings & Events. Rush expects that hybrid meetings will continue post-pandemic with virtual meeting platforms utilized mainly for internal or webinar-based meetings.

Top Destinations

The top 5 meeting destinations in Asia Pacific, based on client data from the American Express Meetings & Events Meetings Insight platform, are reflective of the pandemic restrictions in the region – Singapore and Sydney, Australia did not make the list.

1. Tokyo, Japan
2. Shanghai, China
3. Seoul, South Korea
4. Taipei City, Taiwan
5. Osaka, Japan

Source: Top Asia Pacific city destinations based on sales of event services by American Express Meetings & Events Oct. 2020–Sept. 2021.

I am most excited about...



“New, more seamless technology to create immersive experience and increase engagement, e.g., VR [virtual reality].”

Meeting planner in Asia Pacific

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Special Sections



Be Ready for Anything: Lessons From the Pandemic

What's Your Plan C?

Meeting planners have their work cut out for them in this era of rapid change and instability. It's an exciting – and sometimes stressful – time to be planning meetings and events, particularly when those events are in person. The key trait successful meeting planners share? Flexibility.



Flexibility has always been part of meeting and event planning, whether it's providing an alternative space in case of bad weather or adjusting event dates due to natural disasters. Meeting professionals know to expect the unexpected. But the pandemic has introduced a host of new ways that an event can be disrupted: travel restrictions being introduced at the last minute; flights being canceled due to airline capacity issues; venues shutting down because of local Covid-19 outbreaks; and reduced services due to supplier staffing shortages.

What does this mean for planners? Depending on the event, it could be that having a Plan B is not enough anymore – you might need a Plan C and D. As one industry expert explains, “A good planner has always needed to be flexible, but it’s not basic yoga anymore – now you need to be a contortionist.”

In the spring of 2020, many events were, by necessity, either postponed indefinitely or outright canceled. Now, as the industry recovers and is more comfortable with using technology, organizations are expecting that any meetings and events they plan will be able to switch to a different format if necessary, rather than being canceled. The ability to move to virtual or hybrid means that many meetings can go ahead even if circumstances change. But, as everyone knows by now, that’s not as simple as just turning on a webcam. Meeting professionals have had to become experts in how to use secure technology solutions in a way that will still achieve the meeting objectives. In effect, they are having to plan the same event in two or more formats for contingency purposes.

The Many Components of a Hybrid Meeting

Here are the key areas to consider as you map out the attendee journeys for in-person and virtual audiences.



Questions to Ask for Every Meeting Plan

A flexible plan will take into account all aspects of a meeting or event. The following basic questions should be asked when planning any in-person meeting or event.

What safety measures are in place if there is a local outbreak?

Most hotels and venues have comprehensive duty-of-care plans that cover local health emergencies. They should include information about the nearest medical facilities, guest restrictions and requirements, how to access Covid-19 testing if needed, staff responsibilities, and how information will be communicated. Mobile apps are invaluable for communicating quickly and effectively with guests, and they should be a standard tool in every planner's tool belt. Likewise, local tourism boards in popular leisure destinations are excellent resources for up-to-date information and for help finding extra lodging and transportation if needed.

If lockdowns or restrictions are introduced, or there is an extreme weather event or other unplanned disruption, how will attendees return home quickly and safely?

Although airlines have mostly eliminated change fees in the case of travel restrictions, it can be difficult for a planner on the ground to organize a large-scale airlift with little notice. Working with a group air specialist provides peace of mind and an extra layer of security. Some local tourism boards have been working with airlines to make sure that emergency airlifts can be arranged if leisure and business travelers need to return home on short notice.

Do supplier contracts stipulate flexibility in case of changes in attendee numbers?

Sometimes, a planner will need to adjust an event because more people than expected attend, whether because lockdowns have eased, vaccination mandates increase comfort levels, or corporate policies change to allow travel. In other cases, the number of attendees may decrease at the last minute due to inclement weather or new travel restrictions. Whatever the reason, supplier contracts should be set up to account for

Case Study:

A Successful Transformation to Virtual

In 2020, the team at American Express Meetings & Events worked quickly to change two of their global events from in-person to virtual: INTER[action], based in North America, and HorizON, based in Europe. Both events bring together the global team and supplier partners from around the world for several days of meetings, networking, and celebrations. The events are well known in the meetings and events industry as highly qualified opportunities to connect with consultative meeting professionals.

Since these two events could not happen in their usual format, the planning team decided to combine them into a two-day virtual program (with some in-person components such as supplier-sponsored dinners), bringing together more than 750 employees from 26 countries, and 200-plus supplier attendees from 65 organizations spanning nine time zones.

With their deep expertise in creating engaging event experiences, no matter the format, the planning team delivered a productive and valuable event for all. Suppliers indicated that this was the best virtual supplier event they had attended to date, with a strong networking element – something they had deeply missed throughout the year.

Afterward, an airline industry executive commented: "What a great opportunity for our team to network, with multiple virtual meetings over two days. We could not be more pleased with the event, which took place during one of the most challenging years in our industry. Our thanks to the entire American Express Meetings & Events team for an amazing job. You continue to raise the bar!"



Planners must consider all possibilities; there is no such thing as being too prepared

changes in attendee numbers without penalties or reduction in service. For food and beverage suppliers, that may mean switching from sit-down to boxed meals. For venues, it may mean scaling up or down space, or moving an event inside or outside as needed.

Can the meeting be transformed to a hybrid format if attendees from a certain region are unable to travel?

Having a preferred technology supplier and knowing what platforms will be used in case of the switch to hybrid is something that should be worked out early in the planning process. Communicate with remote sites early about which platform will be used for the virtual portion of the event. Find out how prepared the hotel supplier is to host a hybrid event on short notice – many hotel chains have been investing in A/V equipment and bandwidth and training their staff to assist in this type of situation. Will there be

lighting and camera gear available if needed – and can it be reserved for the duration of the event in case it's needed? Will there be a technical expert on-site who can make sure that all equipment is set up properly and running smoothly? Before a presentation starts, check all lighting and camera angles to confirm that the people watching remotely can see what is happening and will stay engaged.

Is the program mindful of attendees' comfort with physical proximity to others?

This is a particular concern for in-person events, where attendees may not be entirely at ease traveling during the pandemic and may experience stress due to changing circumstances. A flexible program allows for attendees to have as much control as possible over their movements, whether that means offering a choice of a takeout lunch or a sit-down meal or moving awards and recognition ceremonies away from gala dinners to occur during business hours, so that everyone can participate.

Can the meeting become a virtual event if a hybrid event is not feasible?

In addition to the supplier contracts discussed above, make sure that all hotel and venue contracts have flexible cancellation policies. Communicate early and often with attendees, speakers, and support staff. Adjust the program as needed – the tips below can help you effectively pivot from an in-person program to a virtual one.

Tips for Successful Virtual Meetings and Events

- Provide guidelines ahead of time to the speakers and moderators on how to be effective presenters. Engaging with people virtually is not the same as doing it face to face. Make sure presenters are comfortable speaking on camera.
- Shorten presentations. It is not possible to keep the same level of engagement online as face to face. An 8-hour in-person event may work better as a 5- or 6-hour virtual one. Decide what the important information is in the content and get to it right away.

- Adhere to the organization's meetings policy. Use the company's approved suppliers and make sure that any privacy and security concerns are addressed.
- Don't forget to factor technology costs into the budget. Depending on where attendees are in the world, bandwidth charges can be substantial.
- Make the most of the technology. Set up polls and other engaging activities. Call on people at random, to keep their attention. Use chat functions and breakout rooms.
- Have a backup host. Your primary host could be in an area that loses power. Consider having a backup power supply and phone line available, too.
- Don't assume presenters know when they'll be on camera. Make sure your virtual presenters are ready at all times and aware that, even if they aren't speaking, they may be on camera or unmuted – no eating or other distracting activities, please!

As the meetings and events industry continues to evolve at a rapid pace, planners need to be resourceful. Flexibility has always been part of the job – but now it is arguably the number one requirement in job postings, and the most valued skill.

A close-up, slightly low-angle shot of a woman with short, dark, curly hair, smiling broadly and clapping her hands. She is wearing a mustard yellow top under a light grey cardigan. In the background, two other people are visible, also smiling and clapping, suggesting a positive meeting or presentation. The lighting is warm and natural, coming from the left.

The First Steps to Measuring Meeting ROI



Metrics to Start Tracking Now

Congratulations! You just executed a flawless event, and everyone says it was a resounding success. Well done! But wait a minute...how do you know it was a success? What information did you gather to confirm that the meeting's objectives were met, beyond anecdotal attendee feedback?



As budgets tighten and meeting approvals become more multi-layered and stringent, being able to prove the value of a meeting is more important than ever. One way to do that is by measuring the return on investment, or ROI, of your meeting spend. It can be measured at the macro, or program, level and at the micro, or event, level.

Marketers have been tracking the ROI of their campaign spends for decades to determine how effective they are. ROI projections, when applied properly, can be used to justify spending levels, decide where and what to spend on, benchmark against competitors, and keep the team focused and accountable. It is expressed as a percentage that represents the profit or value realized after campaign expenses have been deducted.

While it might seem overwhelming to figure out how to calculate ROI for meetings and events, there are some basic steps to get started.

Step 1: Determine what's important for your meeting program.

Before you can start measuring ROI, there need to be clearly defined meeting objectives and program goals. The success of a meeting can be measured in different ways and depends on the meeting type, the format (whether it's in-person, virtual, or hybrid), and the stakeholders' desired outcomes. For example, the objectives of a product launch could be to drive revenue and sales leads and increase brand awareness. An internal training session, on the other hand, might have the objectives of increasing knowledge and employee retention.

Determining the value of your meeting program is more important than ever

Step 2: Figure out what data needs to be collected.

Once the objectives are set, you can figure out what metrics are available to collect. Meeting ROI doesn't always have to be correlated to dollar values – it could be engagement levels, attendee satisfaction, relationship building, or internal knowledge. In the case of a product launch, the metrics might include the number of qualified leads that come out of the event, the monetary value of product sales, and downloads of the product brochure. In the case of a training session, the metrics may include poll and quiz results taken during the meeting, attendee scores on tests done after the training, or employee satisfaction levels from internal surveys. Note that not all metrics will be available immediately – some may take months to be generated.

Step 3: Make sure you have the right tools.

Think about how you are going to collect and track the necessary data to measure your desired impact. Make the most of live polling options and other attendee engagement measurements during an event. If you are using a streaming platform or mobile app, learn about the metrics that are available. Mobile apps, in particular, are extremely useful for collecting data on users for all meeting formats. Track the number of attendees who signed up for newsletters or marketing emails. Find out how many mobile app users kept the app on their device after the event was over – and of those, how many opened the app afterward and used it to find information or engage with the archived meeting content. Every little interaction with software provides a data point that can be used to measure the effectiveness of an event.

Don't forget about tried-and-true methods of collecting information. Post-event surveys can do more than just rate events and solicit feedback – they can also be used to determine which attendees are more engaged and motivated versus those who are less interested.

Step 4: Start tracking.

Now that the objectives have been set and you know what metrics you are collecting and how, it's time to start tracking. Keep in mind that the internal marketing department and IT department may already be collecting some of the metrics you've identified. However, if your organization is starting from scratch, it may take some time to build a base of information that can be used to calculate ROI and benchmark against in the future.

How Customers Are Using ROI Now

To better understand the adoption levels of meeting ROI, the Account Management team at American Express Meetings & Events ran a survey in June 2021 that asked clients to share their knowledge on what ROI is and how they are, or are not, using it in their meeting and event programs. The results show that while some are



integrating ROI into their meeting programs, it is not an industry-wide practice yet.

The survey's 43 respondents were in varied roles: admin, sales/marketing, procurement, travel, and meetings and events. Key findings are:

- 44% said they currently measure ROI for their events.
- 100% of those who are currently measuring ROI are focused on measuring attendee satisfaction; 47% are focused on measuring monetary value.
- 9% agreed that ROI currently influences their meetings and events portfolio or calendar of meetings and events.
- 70% said that measuring ROI for meetings and events had become more relevant for their organization.

Respondents who are not currently measuring ROI were asked to comment on what they would be interested in measuring. Responses ranged from "Don't know what ROI stands for" to this considered reply:

"Currently not measuring ROI given most of our meetings have subjective, non-metric meeting objectives. I would like to put a value or return on the physical face-to-face meetings versus remote meetings. There is true value in the informal meetings that happen during a face-to-face meeting that just are not possible remotely. Also would like a way to value how a one-day meeting can drive for a faster, higher quality solution versus solving the same issue remotely."

Table 1: **Basic ROI Measurements**

Measurement	Measurement Focus	Example Method	Timing
1. Attendee satisfaction	Reaction to or perceived value of the meeting	Send attendee satisfaction survey	At meeting conclusion
2. Learning	Information, knowledge, skills, and contacts gained	Send/administer test to assess knowledge of new product	Soon after meeting
3. Application/implementation	Use of information, knowledge, skills, and contacts	Calculate number of appointments made by sales reps	2–3 months after meeting
4. Impact/consequences	Positive changes in the business as a result of the meeting	Calculate any increase in revenue	6 months after meeting
5. Return on investment	Profit or value realized	Calculate incremental revenue gained from meeting	6 months after meeting

Several respondents commented that they were interested in learning how to do more results tracking for their meetings and events; several wondered whether there would eventually be standardization across the industry.

Based on the survey results, the Account Management team offers the above table to help customers take the first steps to measure ROI on the five most common metrics.

Each of the five measurements in the table provides a calculation of the value driven by a meeting. While measuring ROI for meetings and events might seem daunting, the most critical metric is the first one. If you're not currently measuring attendee satisfaction after your meetings and events with post-event surveys, that is an easy place to start. You then can add other measurements in the future.

Data Tables

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

Methodology

To develop this 2022 Global Meetings and Events Forecast, a number of sources were used, including proprietary American Express Meetings & Events data sources, licensed third party data and industry information, as well as interviews with industry leaders. Information and data was gathered from actual and planned meetings activity of American Express Meetings & Events globally. Proprietary surveys of meeting professionals were conducted to gather trends across North America, Europe, Asia Pacific, and Central and South America. A survey of leading hotel and airline suppliers as well as follow-up interviews were also used to inform the findings in this Forecast. Data was collected based on US dollars across all regions and dollar amounts in tables throughout this Forecast indicate amounts in US dollars.

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TRENDS

Level of Optimism

Percent of respondents

The majority of respondents in each region are optimistic about the health of the meetings and events industry in 2022.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
1 – Very Discouraged	0%	0%	0%	0%
2	0%	0%	0%	0%
3 – Discouraged	2%	0%	0%	4%
4	1%	4%	3%	5%
5 – Neither discouraged nor optimistic	3%	9%	0%	8%
6	5%	9%	2%	9%
7 – Optimistic	16%	19%	9%	11%
8	26%	33%	28%	29%
9	19%	16%	23%	21%
10 – Very Optimistic	28%	11%	35%	13%
8 to 10	74%	59%	87%	64%

Attendee Levels

Percent of respondents

The majority of respondents expect the number of attendees at in-person events to return to pre-pandemic levels within the next few years.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Yes, in the near future (1 or 2 years)	70%	57%	81%	62%
Yes, within 5 years	20%	29%	15%	26%
No, not expected to return to 2019 levels	11%	14%	4%	12%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Top Factors Influencing Meeting Location

Percent of respondents

Having enough meeting space to accommodate physical distancing requirements and expectations is the top factor influencing meeting location selection (other than Covid-19 restrictions). Respondents are also looking at a location's ability to host hybrid meetings.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Size of meeting space to accommodate social distancing	25%	42%	33%	37%	47%
Food and beverage protocol	6%	10%	9%	4%	9%
Guest temperature and symptom screening	6%	7%	13%	16%	20%
Safety concerns related to economic / political instability	22%	17%	19%	19%	7%
Currency / exchange rate	4%	3%	9%	4%	7%
Online reviews	5%	4%	8%	8%	4%
Perceptions around "resort" destination for meetings	8%	4%	9%	4%	7%
Participation in company or organization's preferred supplier program	18%	10%	7%	14%	4%
Ease of air lift / transportation to location for attendees	20%	21%	17%	25%	20%
Client directive based on past experience	15%	12%	5%	10%	7%
Repeat destination for meeting	9%	11%	4%	4%	0%
Specific location type needed - airport, near training facility, near customer location, etc.	23%	19%	18%	16%	9%
Ability to host hybrid meetings (eg, Wi-Fi bandwidth, skilled A / V staff)	25%	22%	28%	25%	22%
GBAC STAR Accreditation	2%	3%	4%	3%	2%
Disinfection protocols	11%	12%	18%	11%	22%
Other: please specify	2%	2%	0%	0%	0%

Mobile App Usage

Percent of respondents

More than three-quarters of respondents say their organization currently uses or plans to use mobile apps for meetings.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Yes	73%	63%	88%	84%
No	19%	27%	10%	14%
Don't know	9%	11%	3%	2%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Reasons to Use Mobile Apps

Percent of respondents

Improving attendee engagement, facilitating networking, and improving communications are the top reasons to use mobile apps.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Improve engagement of attendees	49%	45%	40%	40%
Facilitate networking among attendees	28%	30%	39%	37%
Improve communications	41%	32%	33%	28%
Communicate with attendees regarding changes or emergencies	28%	51%	28%	27%
Deliver documents electronically	31%	18%	22%	16%
Measure event effectiveness overall	15%	10%	21%	22%
Compliance measurement	5%	6%	7%	15%
Measure effectiveness of presentations	1%	7%	7%	15%
Other: please specify	0%	0%	0%	0%

Virtual Challenges

Percent of respondents

Lack of tech experience and lack of engagement were the biggest challenges meeting planners faced when conducting meetings in 2021.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Lack of knowledge/experience with virtual meetings and the technology	23%	22%	29%	33%
Limited budget	14%	17%	25%	16%
Poor attendance	13%	16%	19%	14%
Technical issues	42%	35%	46%	35%
Lack of engagement	33%	25%	11%	36%
Corporate mandates related to meetings	17%	16%	9%	9%
Security concerns	14%	18%	38%	20%
Below average learning and retention	11%	10%	5%	4%
Did not achieve meeting's objective (to inform, shift behavior, motivate, connect, etc.)	11%	7%	8%	29%
Other: please specify	8%	3%	1%	0%
Not applicable – I did not plan any virtual-only events	6%	10%	0%	0%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Technology Usage

Percent of respondents

Respondents are very confident in their ability to incorporate technology in a way that enhances the meeting experience.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
1 – Very Discouraged	0%	0%	0%	0%
2	0%	0%	1%	0%
3	0%	1%	0%	0%
4	0%	2%	2%	2%
5 – Neither discouraged nor optimistic	8%	9%	2%	5%
6	5%	12%	0%	10%
7	14%	21%	4%	11%
8	33%	27%	25%	31%
9	13%	15%	27%	27%
10 – Very Optimistic	27%	13%	40%	15%

Sustainability

Percent of respondents

Worldwide, 83% of respondents say their organization takes sustainability into account.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Yes	78%	74%	92%	86%
No	18%	17%	5%	9%
Don't know	4%	9%	3%	5%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Sustainable Practices

Percent of respondents

Respondents plan to minimize paper usage and apply energy-saving and waste reduction measures in their 2022 meetings to comply with their organizations' sustainability policies.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Booking suppliers (air, hotel, ground transportation, F&B) with an active green policy or certificate in place	47%	49%	49%	59%
Encouraging attendees to use public transportation, carpool, rideshare, walk when possible	26%	31%	40%	43%
Recommending a location with minimal amounts of travel for attendees	37%	37%	50%	40%
Applying energy-saving and waste reduction measures (separation of waste; LED lighting, recycling programs)	44%	49%	68%	57%
Minimizing paper usage (eg by using mobile apps, QR codes, electronic gift cards etc.)	59%	62%	68%	69%
Post event CO2 calculation	15%	26%	20%	29%
Other: please specify	1%	2%	1%	1%
Don't know	16%	7%	2%	1%

Use of Sharing Economy Suppliers

Central and South American and Asian Pacific respondents are more likely to say their organizations allow the use of sharing economy suppliers (such as Uber and Airbnb). More than half of respondents in Europe say their organizations either don't have a policy or they don't know what the policy is.

Transportation

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Use Prohibited	7%	17%	11%	11%
No Official Policy	24%	27%	16%	23%
Use Permitted	55%	33%	71%	65%
Don't Know	15%	24%	3%	1%

Lodging

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Use Prohibited	20%	25%	12%	13%
No Official Policy	32%	27%	29%	24%
Use Permitted	27%	24%	55%	55%
Don't Know	21%	25%	4%	8%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Covid-19 Factors in Event Planning

Percent of respondents

The top Covid-19 factor worldwide that is considered when planning an event is proof of vaccination, although there are regional variations – in North America, respondents are more focused on meeting space size and complying with regulations.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Covid-19 vaccination cards / proof of receiving vaccine	27%	42%	45%	44%
Large enough space to accommodate physical distancing	49%	39%	31%	25%
Temperature checking and Covid-19 symptom screening	22%	19%	39%	31%
Complying with most up-to-date health and travel guidelines	48%	43%	30%	35%
Making sure attendees have not been exposed to Covid-19 prior to meeting or event	36%	37%	36%	43%
Number of total attendees	22%	24%	26%	24%

Diversity, Equity and Inclusion

Percent of respondents

Respondents overwhelmingly stated that their organizations and clients actively strive to incorporate diversity, equity and inclusion into their meetings and events.

TOTAL	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Yes	87%	80%	92%	87%
No	7%	7%	6%	5%
Not sure	6%	13%	2%	8%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Incorporating Diversity and Inclusion

Percent of respondents

For organizations that actively strive to ensure meetings are inclusive, the top two ways they do so are by providing an option to attend virtually and choosing diverse speakers, emcees or entertainment.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Providing an option to attend the meeting or event virtually	20%	31%	26%	38%
Focusing on accessibility (wheelchair-friendly venue and activities)	16%	23%	32%	16%
Building in alternative forms of communication (e.g. sign language, subtitles, translator, etc.)	17%	12%	51%	21%
Using diverse / minority-owned suppliers (hotel, F&B, DMC, ground transportation, audiovisual (A/V) / production)	30%	22%	18%	35%
Choosing diverse / minority speakers, emcees, or entertainment	42%	30%	14%	28%
Within meeting or event content (topics and presentations)	22%	32%	20%	15%
Through a charitable giving element of the meeting or event	24%	13%	13%	21%
Including gender pronoun preferences in meeting registration sites and virtual / physical name badges (e.g. she / her, he / him / his, they / them etc.)	8%	14%	19%	19%
Other: please specify	0%	1%	0%	0%
Not sure	8%	6%	1%	0%

Diversity Spending

Percent of respondents

Food and beverage and A/V are the areas where respondents are most likely to shift spending to diverse suppliers.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Hotel	19%	15%	17%	16%
Food and beverage / catering / restaurant	31%	28%	27%	29%
Destination Management Company (DMC)	17%	12%	12%	23%
Ground	2%	5%	6%	8%
Audiovisual (A/V) / production	8%	16%	34%	18%
Not sure	24%	23%	4%	6%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Career Options for Meetings and Events Professionals

Percent of respondents

The majority of respondents are optimistic about their industry, with every region except Europe saying their career options are excellent or close to excellent.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
1 – Poor	1%	3%	1%	0%
2	2%	1%	0%	1%
3	3%	2%	0%	1%
4	4%	4%	1%	2%
5 – Neither poor nor excellent	13%	12%	4%	4%
6	5%	12%	4%	17%
7	17%	24%	9%	18%
8	19%	20%	30%	24%
9	16%	13%	19%	23%
10 – Excellent	22%	9%	33%	11%
8 to 10	56%	42%	82%	58%

MEETINGS ACTIVITY

Meeting Format

Percent of meetings

More than 81% of meetings in 2022 are expected to have an in-person component, whether exclusively in-person or hybrid.

2021	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
2021: In-person only	31%	25%	22%	27%
2021: Hybrid (virtual attendees and in-person attendees)	18%	18%	25%	24%
2021: Hybrid multi-hub (two or more in-person meetings connected via a virtual platform)	13%	15%	21%	22%
2021: Virtual-only	38%	41%	33%	27%
2022				
2022: In-person only	54%	48%	34%	33%
2022: Hybrid (virtual attendees and in-person attendees)	20%	19%	22%	24%
2022: Hybrid multi-hub (two or more in-person meetings connected via a virtual platform)	13%	14%	21%	24%
2022: Virtual-only	12%	19%	23%	19%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Location Selection by Format

Percent of meetings

Local and regional meetings are expected to dominate, no matter the size or format.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Will be in-person only: Small (less than 25) local events that require no air travel or hotel	20%	28%	26%	22%
Will either be hybrid OR a hybrid multi hub format (connecting multiple in-person meetings via a virtual platform): Small (less than 25) local events that require no air travel or hotel	19%	22%	24%	21%
Will either be hybrid OR a hybrid multi hub format (connecting multiple in-person meetings via a virtual platform): Larger (25+) local events that require no air travel or hotel	20%	19%	17%	19%
Will either be hybrid OR a hybrid multi hub format (connecting multiple in-person meetings via a virtual platform): Larger (25+) regional with air and hotel	25%	17%	14%	17%
Will be in-person only: Larger (25+) regional with air and hotel	27%	16%	15%	15%
Will be in-person only: Larger (25+) local events that require no air travel or hotel	15%	17%	17%	20%
Will be in-person only: Small (less than 25) regional with air and hotel	19%	18%	18%	15%
Will either be hybrid OR a hybrid multi hub format (connecting multiple in-person meetings via a virtual platform): Small (less than 25) regional with air and hotel	14%	16%	16%	16%
Will either be hybrid OR a hybrid multi hub format (connecting multiple in-person meetings via a virtual platform): International – any size, with air and hotel (outside of attendee's home country)	11%	16%	14%	14%
Will either be hybrid OR a hybrid multi hub format (connecting multiple in-person meetings via a virtual platform): Tradeshow and industry gatherings (sessions, networking, exhibits)	11%	10%	15%	14%
Will be in-person only: Tradeshow and industry gatherings (sessions, networking, exhibits)	10%	10%	13%	15%
Will be in-person only: International – any size, with air and hotel (outside of attendee's home country)	10%	11%	11%	12%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

In-Person Meeting Frequency

2022 vs. 2021

Respondents expect an increase in the number of all types of in-person meetings in 2022, compared to 2021.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting / Training	6.5%	5.2%	3.7%	3.0%
Product Launch (Internal / External)	6.0%	3.8%	3.4%	2.0%
Conference / Tradeshow	5.3%	3.4%	3.3%	2.1%
Senior Leadership Meeting / Board Meeting	6.6%	3.4%	3.0%	1.4%
Client / Customer Advisory Board	5.7%	4.5%	3.6%	3.0%
Incentive / Special Event	5.5%	2.6%	2.3%	1.6%
Small / Simple Meetings	5.5%	5.9%	3.3%	2.5%

Virtual/Hybrid Meeting Frequency

2022 vs. 2021

Respondents expect the number of virtual/hybrid internal team meetings to see the biggest increase in 2022.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting / Training	4.3%	2.6%	4.7%	3.0%
Product Launch (Internal / External)	2.9%	2.0%	4.6%	2.6%
Conference / Tradeshow	2.5%	2.2%	3.4%	1.9%
Senior Leadership Meeting / Board Meeting	3.1%	2.6%	4.2%	1.5%
Client / Customer Advisory Board	3.0%	3.0%	4.6%	2.3%
Incentive / Special Event	2.7%	1.5%	3.8%	2.0%
Small / Simple Meetings	3.2%	3.2%	4.1%	1.7%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Factors That Influence In-Person Planning

Percent of respondents

Planners are looking for strong duty-of-care components and supplier flexibility when they plan in-person events.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Confidence in duty-of-care components for attendee health and safety	51%	46%	65%	68%
Favorable / flexible cancellation and attrition terms	60%	69%	26%	34%
Favorable rates and reduced fees	32%	14%	22%	20%
Limited time special offers (including free gifts and add-ons such as dinner vouchers, VIP lounge access, etc.)	11%	15%	27%	21%
Supplier flexibility to adapt to the customers' meetings and events requirements	46%	56%	60%	56%
Other: please specify	0%	0%	0%	1%

Factors That Influence Changes in Meeting Spend

Percent of respondents

Revenue changes, growth plans and macroeconomic changes were the top non-pandemic reasons that influence a change in meeting spend at respondents' organizations.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Growth plan	47%	42%	51%	52%
Revenue changes	53%	48%	45%	36%
New product launches	35%	40%	47%	48%
Macroeconomic changes	33%	30%	40%	52%
Other: please specify	1%	1%	1%	0%
Don't know	12%	13%	2%	3%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Number of In-Person Attendees

2022 vs. 2021

Respondents in all regions expect an increase in the average number of attendees at in-person events next year, particularly at internal team meetings.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting / Training	5.4%	4.3%	5.4%	2.2%
Product Launch (Internal / External)	4.9%	3.8%	5.1%	1.9%
Conference / Tradeshow	4.6%	3.0%	4.8%	1.8%
Senior Leadership Meeting / Board Meeting	5.3%	3.4%	4.4%	1.4%
Client / Customer Advisory Board	5.1%	4.1%	4.9%	3.0%
Incentive / Special Event	5.2%	2.8%	4.7%	1.9%
Small / Simple Meetings	5.0%	5.1%	4.9%	1.5%

Number of Virtual/Hybrid Attendees

2022 vs. 2021

Respondents in Central and South America expect the biggest increase in attendees across all types of hybrid and virtual meetings.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting / Training	2.8%	2.0%	4.6%	3.6%
Product Launch (Internal / External)	2.8%	1.1%	4.8%	2.6%
Conference / Tradeshow	2.9%	2.2%	4.6%	3.0%
Senior Leadership Meeting / Board Meeting	3.2%	1.0%	4.6%	2.2%
Client / Customer Advisory Board	3.3%	2.5%	4.9%	2.9%
Incentive / Special Event	2.0%	2.1%	3.8%	2.9%
Small / Simple Meetings	3.1%	1.9%	4.6%	2.2%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Days per Meeting (In-Person)

Number of days

Conferences/tradeshows and incentives/special events are the longest types of meetings; small/simple meetings are the shortest.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting / Training	2.5	2.1	2.6	2.8
Product Launch (Internal / External)	2.8	2.1	2.8	2.4
Conference / Tradeshow	3.2	2.8	3.1	3.3
Senior Leadership Meeting / Board Meeting	2.5	1.9	2.3	2.5
Client / Customer Advisory Board	2.1	1.8	2.1	2.5
Incentive / Special Event	3.7	2.9	2.6	2.8
Small / Simple Meetings	1.8	1.5	1.7	1.6

Overall Meeting Spend

Percent of respondents

One-third of respondents globally say their overall meeting spend is expected to increase by 6% or more in 2022. Global hoteliers are predicting smaller increases, although two-thirds say they expect budgets to stay the same or increase.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Significantly Decreasing (11%+)	4%	3%	2%	4%	2%
Decreasing (6%–10%)	3%	12%	7%	4%	7%
Slightly Decreasing (1%–5%)	11%	8%	12%	15%	23%
Staying the same	14%	12%	13%	18%	20%
Slightly Increasing (1%–5%)	27%	32%	32%	32%	25%
Increasing (6%–10%)	21%	18%	25%	22%	11%
Significantly Increasing (11%+)	20%	14%	9%	6%	11%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Cost Area Cut First to Reduce Budget (and maintain customer experience)

Percent of respondents

If budgets needed to be reduced, respondents would cut off-site activities and the number of nights first.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Off-site option activities	25%	26%	20%	17%
Number of nights	20%	22%	19%	19%
Off-site evening events	11%	10%	25%	15%
Food & beverage	9%	8%	5%	14%
Use of Destination Management Company (DMC)	14%	9%	1%	13%
On-site travel staff	8%	8%	12%	8%
Room drops	6%	6%	5%	8%
Communication	4%	4%	5%	4%
Ground Transportation	1%	4%	6%	1%
Other: please specify	4%	4%	1%	1%

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

Percent of respondents

If budgets increased by 10%, respondents say they would improve the on-site experience or increase technology use.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Improve on-site experience	42%	28%	13%	31%
Increase use of technology	20%	21%	30%	35%
Increase number of attendees at meetings	16%	12%	19%	11%
Increase number of meetings	10%	20%	11%	10%
Improve content delivery	7%	10%	18%	6%
Increase number of days for meetings	4%	4%	8%	6%
Other: please specify	0%	0%	0%	0%
Don't know	2%	4%	1%	1%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Change in Total Cost per Attendee

2022 vs. 2021

Planners in every region except Asia Pacific expect to see significant increases in cost per attendee in 2022, whether the event is in person, virtual or hybrid. Note that cost per attendee does not include air costs.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting / Training	3.2%	2.1%	3.4%	0.8%
Product Launch (Internal / External)	3.9%	2.9%	3.6%	2.3%
Conference / Tradeshow	3.8%	2.8%	2.5%	2.1%
Senior Leadership Meeting / Board Meeting	4.0%	1.7%	2.3%	0.8%
Client / Customer Advisory Board	3.9%	2.4%	3.1%	0.7%
Incentive / Special Event	3.5%	2.7%	3.0%	1.1%
Small / Simple Meetings	3.8%	1.4%	1.7%	0.1%

Total Cost per In-Person Attendee

US dollars

In all regions except Asia Pacific, incentives/special events are expected to have the highest cost per attendee. Respondents from Asia Pacific budget the most for product launches. Note that cost per attendee does not include air costs.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting / Training	\$618	\$535	\$609	\$736
Product Launch (Internal / External)	\$735	\$664	\$816	\$926
Conference / Tradeshow	\$720	\$733	\$782	\$900
Senior Leadership Meeting / Board Meeting	\$776	\$685	\$736	\$863
Client / Customer Advisory Board	\$753	\$694	\$661	\$836
Incentive / Special Event	\$888	\$793	\$825	\$900
Small / Simple Meetings	\$476	\$475	\$486	\$495

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Total Cost per Virtual/Hybrid Attendee

US dollars

Respondents budget similar cost per attendee for most types of hybrid/virtual meetings as they do for in-person meetings.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Internal Team Meeting / Training	\$612	\$462	\$593	\$656
Product Launch (Internal / External)	\$750	\$623	\$732	\$801
Conference / Tradeshow	\$743	\$657	\$717	\$870
Senior Leadership Meeting / Board Meeting	\$663	\$613	\$669	\$773
Client / Customer Advisory Board	\$757	\$587	\$619	\$778
Incentive / Special Event	\$786	\$736	\$769	\$803
Small / Simple Meetings	\$568	\$459	\$466	\$525

MEETINGS MANAGEMENT

Meeting Management Components Adoption

Percent of respondents

Organizations are most likely to have adopted the food and beverage components of their meeting policies. The level of ground transportation policy adoption is lagging.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Hotel	19%	15%	17%	16%
Food and beverage / catering / restaurant	31%	28%	27%	29%
Destination Management Company (DMC)	17%	12%	12%	23%
Ground	2%	5%	6%	8%
Audiovisual (A/V) / production	8%	16%	34%	18%
Not sure	24%	23%	4%	6%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Explicit Policy Language

Percent of respondents

Safety and security tops the list of components that are explicitly defined in organizations' meetings and events policies, followed by the use of preferred suppliers.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Safety and security	74%	67%	62%	59%
Use of meetings planning technology	44%	52%	67%	58%
Use of preferred hotel / air / transportation suppliers	61%	57%	48%	46%
Approval process	52%	51%	42%	45%
Payment methods and processes associated with meeting / events goods and services	60%	51%	35%	43%
Virtual and hybrid meetings specific policies	43%	40%	49%	56%
Health and wellness	48%	36%	48%	44%
Procurement of meetings / events goods and services	60%	36%	32%	48%
Small / simple meetings	42%	45%	34%	34%
Global expansion / standardization of meetings and events program	30%	36%	33%	40%
Social media acceptable use	30%	28%	48%	33%
Use of third-party meeting planners	44%	27%	23%	31%
Meetings ROI metrics	23%	31%	16%	34%
Use of Sharing Economy Suppliers (e.g. Airbnb, Uber, Lyft)	25%	19%	31%	29%
Other: please specify	0%	0%	0%	0%
None of the above	2%	4%	0%	2%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

HOTELS, AIR AND MEETING SPACE

Average Group Rates

Percent of respondents

Most respondents expect average group rates for hotels and air to increase next year, although half of respondents from Asia Pacific believe group rates for both hotel and air will stay the same or decrease.

Average Group Rate for Hotels

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
	5.11%	1.56%	2.83%	1.02%	2.33%

Average Group Rate for Air

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	AIR SUPPLIERS
	5.06%	2.42%	3.29%	1.63%	5.29%

Group Air Management

Percent of respondents

Only 7% of respondents in North America use group air management booking for all of their meetings that require air travel. The majority of respondents use group air management for less than 50% of meetings that require air travel.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
0%	4%	9%	3%	1%
1–10%	11%	20%	17%	14%
11–25%	21%	30%	27%	20%
26–50%	26%	22%	28%	40%
51–75%	16%	12%	20%	16%
76–99%	15%	4%	6%	6%
100%	7%	2%	1%	2%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Group Air Resources

Percent of respondents

Almost half of respondents worldwide say they most frequently use a travel management company when booking group air.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
Direct arrangements with airline	31%	32%	52%	50%
Internal group air specialist	41%	38%	25%	35%
Meetings management supplier	23%	24%	35%	50%
Travel management company	57%	38%	50%	46%
Online booking tool	38%	34%	59%	48%
Other: please specify	1%	2%	0%	1%
Not applicable	5%	6%	1%	2%

Group Air Online Booking

Percent of respondents

European respondents are the least likely to use an online booking tool for group air; North American respondents are the most likely.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
	61%	43%	60%	61%

Influence of Group Air Rates

Percent of respondents

Almost one-third of respondents worldwide say that group air rates are very or extremely influential on destination choice.

TOTAL	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC
	14%	22%	6%	12%
Slightly influential	27%	15%	16%	15%
Moderately influential	24%	15%	39%	37%
Very influential	18%	23%	27%	30%
Extremely influential	9%	5%	10%	3%
Don't know	3%	13%	2%	3%
Not applicable	5%	8%	0%	0%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Room and Meeting Space Availability

Year over year

Hoteliers expect a significant increase in room availability in 2022 compared to the meeting planner respondents. All agree that space will be much more available in 2023.

	NORTH AMERICA	EUROPE	CENTRAL/S. AMERICA	ASIA PACIFIC	GLOBAL HOTELIERS
Room availability 2022	1.0%	2.3%	3.7%	1.5%	1.9%
Room availability 2023	2.7%	4.1%	5.5%	2.6%	4.1%
Meeting space availability 2022	0.7%	1.7%	3.3%	2.1%	1.2%
Meeting space availability 2023	2.1%	4.0%	5.3%	4.0%	4.1%

Group Meeting Space Availability

Percent of respondents

Globally, hoteliers expect modest increases in room and meeting space availability.

	GLOBAL HOTELIERS	
	2022	2023
Significantly Decreasing (11%+)	5%	5%
Decreasing (6%–10%)	14%	5%
Slightly Decreasing (1%–5%)	23%	12%
Staying the same	12%	19%
Slightly Increasing (1%–5%)	26%	16%
Increasing (6%–10%)	2%	23%
Significantly Increasing (11%+)	19%	21%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

Key Trends in the Hotel Industry

Weighted ranking

Hoteliers believe that the re-flagging of hotel properties will have the most impact on meetings and events, followed by increased investment in meetings technology and disinfection and social distancing protocols.

	GLOBAL HOTELIERS
Re-flagging of hotel properties	27%
Increased investment in meetings technology	22%
Disinfection and social distancing protocols	22%
More challenging contract negotiations	20%
Slower RFP response rates due to reduced hotel staff	20%
Changes in contractual terms and conditions	20%
Increased use of boutique hotels	19%
Erosion of group program points	17%
GBAC STAR Accreditation	16%
Change in key contacts for customer organizations	15%

Source: North American, European, Central/South American, and Asian Pacific Surveys from American Express Meetings & Events, June-July 2021.

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