

ASIA PACIFIC

Meetings Activity

Number of Meetings by Meeting Type

Optimistic in Asia Pacific. While respondents in other global regions point to a leveling off of growth, those in Asia Pacific express some optimism, predicting increases in the number of meetings across most meeting types. As the global hub of manufacturing with very diverse travel destinations, the economic growth and development of meetings and tourism infrastructure throughout the region have contributed to a positive outlook for 2017. Larger meetings including sales and marketing, conferences and tradeshows, training and internal team meetings continue to be the more popular meeting types in the region.

Australia stands apart. Respondents in Australia predict a decrease in the number of training, senior leadership and advisory board meetings, while they expect the number of internal team meetings and product launches to increase. The relatively high number of expected internal meetings could be explained partly by the prevalence of regional head offices in Australia as well as the capacity that exists in Australia to sustain this meeting activity.

Number of Attendees per Meeting

Growing capacity and more attendees. The development of travel and meeting infrastructure continues to sustain a growing meetings and events industry in the region. Meeting size is expected to increase across most meeting types throughout the region over the coming year. The growth in number of attendees per meeting predicted in last year's forecast is expected to continue with conferences and tradeshows, incentive and special events and sales and marketing meetings standing out as the larger meeting types.

Days per Meeting

Little change from 2016. Meeting length is predicted to change by less than half a day across meeting types in the region with the exception of Australia, where larger decreases are predicted for several meeting types. While Australia stood out in 2016 with longer sales and marketing as well as conferences and tradeshows, respondents predict these meeting lengths to more closely align with overall regional numbers in 2017. In fact, Australian conferences and tradeshows, as well as incentives and special events, are expected to be shorter than the rest of the region next year.

The complexity of meeting planning. While meetings might get shorter, many become more complex, as large meetings often give rise to many smaller sub-meetings that then occur simultaneously. One Asia Pacific meetings expert explains how one meeting can transform quickly. “For example, we have a large meeting coming up in China with over 900 attendees. It began as one meeting. It now comprises 80 smaller meetings as individuals are trying to maximize the opportunity to meet.”

Large meeting activity such as this contributes to more complexity throughout the meeting planning process. A global meetings professional says in order to manage the growth in meetings activity and this type of complexity, meeting planners and suppliers are looking more closely at their meetings strategy. He suggests “Asia Pacific planners and suppliers are working to consolidate using a strategic base to ensure they can meet the demand.” Many suggest that attention to overall meetings strategy can better facilitate procurement and planning for meetings and events.

Meetings Budget & Planning

Overall Meeting Spend & Cost per Attendee

Remaining flat. While meeting activity may be on the upswing, overall meeting spend per company is expected to remain flat through 2017 in Asia Pacific. Australia stands out with a predicted increase of 2.8% in 2017, although this is down from its 5.1% forecast for 2016.

Number of Meetings

▲ Greater than 20% increase over previous year

▼ Greater than 20% decrease over previous year

MEETING TYPE	ASIA PACIFIC	AUSTRALIA
Sales/Marketing	15.0 ▲	10.9
Training	12.5	9.7 ▼
Internal Team Meeting	15.6 ▲	18.4 ▲
Product Launch (Internal/External)	6.0 ▲	4.3 ▲
Conferences/Trade shows	11.5 ▲	16.0
Senior Leadership/Board Meeting	6.2	5.0 ▼
Advisory Board	5.8 ▼	5.1 ▼
Incentive/Special events	6.2	5.1

Number of Attendees per Meeting

▲ Greater than 20% increase over previous year

▼ Greater than 20% decrease over previous year

MEETING TYPE	ASIA PACIFIC	AUSTRALIA
Sales/Marketing	124	124 ▼
Training	102 ▲	76
Internal Team Meeting	103 ▲	123 ▲
Product Launch (Internal/External)	180 ▲	104
Conferences/Trade shows	290 ▲	161
Senior Leadership/Board Meeting	71 ▲	41
Advisory Board	43 ▼	29
Incentive/Special events	153	209 ▲

Days per Meeting

▲ Increase over previous year

▼ Decrease over previous year

MEETING TYPE	ASIA PACIFIC	AUSTRALIA
Sales/Marketing	2.2	2.1 ▼
Training	2.3 ▲	1.6 ▼
Internal Team Meeting	2.1 ▲	2.2 ▼
Product Launch (Internal/External)	1.6 ▲	1.7 ▲
Conferences/Trade shows	2.7 ▼	2.2 ▼
Senior Leadership/Board Meeting	2.3 ▲	2.4 ▲
Advisory Board	1.6 ▼	1.4 ▼
Incentive/Special events	3.0 ▼	2.5 ▼

(Source: American Express Meetings & Events Asia Pacific Survey, August 2016)

Cost Per Attendee (excluding air cost)

MEETING TYPE	ASIA PACIFIC	AUSTRALIA
Sales/Marketing	\$386	\$342
Training	\$312	\$179
Internal Team Meeting	\$252	\$70
Product Launch (Internal/External)	\$493	\$275
Conferences/Trade shows	\$550	\$354
Senior Leadership/ Board Meeting	\$499	\$315
Advisory Board	\$475	\$164
Incentive/Special events	\$603	\$345

(Source: American Express Meetings & Events Asia Pacific Survey, August 2016)

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

	ASIA PACIFIC	AUSTRALIA
Number Of Nights	14%	25%
Registration Site	0%	0%
Ground Transportation	2%	0%
Communication	2%	0%
Off-Site Evening Events	12%	6%
Off-Site Optional Activities	29%	25%
Audio Visual	5%	13%
Food & Beverage	14%	13%
On-site Travel Staff	9%	13%
Room Drops	5%	0%
Use Of Destination Management Company (DMC)	9%	6%

(Source: American Express Meetings & Events Asia Pacific Survey, August 2016)

Less per attendee in Australia. Compared to the region overall, respondent predictions for the average cost per attendee, excluding air cost, in Australia are much lower.

Emphasis on the entire meeting experience.

As with other regions, when faced with tighter budgets, respondents in Asia Pacific indicate that meeting owners are willing to limit off-site optional events and activities as well as shorten the number of nights per meeting. Meeting owners are not willing to make cuts when it comes to registration, communication and transportation. The attendees' experience of the meeting is top priority. While budgets are crucial, one meetings expert in Asia Pacific points out that for some large companies planning meetings does not begin with the budget, necessarily, but with understanding the desired experience from beginning to end. She explains that "negotiation is not in terms of budget, but in terms of the customer experience from their first flight to the meeting to the return trip home."

Meeting Locations

Primary Locations for Meetings

Large cities less appealing. The appeal of large cities continues to decline from previous years, with respondents in both Australia and the region overall suggesting that 81% of meetings will be held in large cities. This represents a shift for Australia from its 88% in 2016 as it follows the global trend toward greater use of second-tier locations.

The top ten. The top ten cities in the region are similar to last year, with Singapore in the number one spot again and Sydney, Australia, replacing Shanghai, China, as number two. Shanghai moves to sixth on the list and Kuala Lumpur, Malaysia, moves into third. Seoul, South Korea, makes it onto the list for 2017 as the tenth top city in the region.

Pricing Trends

Group Hotel Rates

Rising rates. Respondents suggest group hotel rates will continue their gradual climb, at a rate of 1.2% in 2017. Respondents in Australia predict a greater climb of 2.8%. One meetings expert in the region explains “that suppliers are getting a lot more aggressive, recognizing that the pipeline is challenged for 2017 with greater demand than supply. But supply versus demand depends on the destination and we do have great diversity here.”

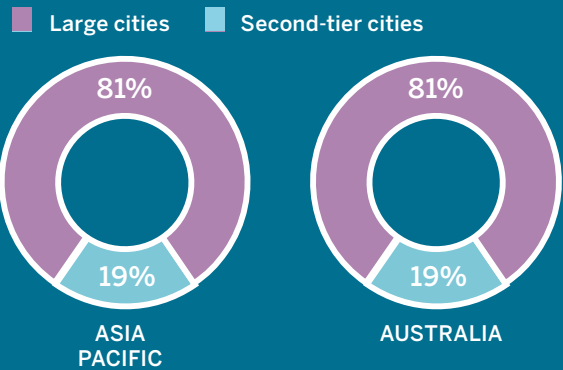
Working together. Experts suggest that the best way to ensure better rates, whether hotel or air, is to plan in advance and for planners and companies to work collaboratively to identify the best timing and destinations for meetings.

Building opportunities. A global supplier indicates that “new hotel openings are growing the breadth of destination possibilities in the region including Myanmar, Vietnam, Indonesia and other areas. This region is building on its diversity and its meetings and events will benefit.”

Overall Meeting Spend

MEETING BUDGETS	ASIA PACIFIC	AUSTRALIA
Overall Spend	-0.1%	+2.8%

Primary Locations for Meetings



Group Hotel Rates

	ASIA PACIFIC	AUSTRALIA
2017	1.2%	2.8%
2016	1.4%	2.1%

(Source: American Express Meetings & Events Asia Pacific Survey, August 2016)

Top 10 Asia Pacific Cities based on Meetings & Events Activity

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

(Source: Cvent, 2016)