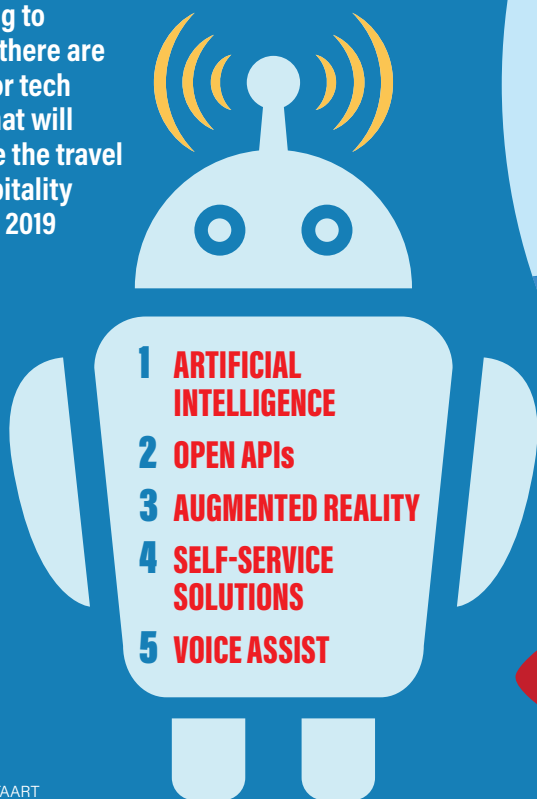


FORECASTING FOR SUCCESS

BBT looks at predictions for the year ahead across business travel, meetings & events, as well as what buyers believe they will face throughout 2019

TECH TRENDS

According to DataArt, there are five major tech trends that will influence the travel and hospitality sector in 2019



SOURCE: DATAART



US\$
234

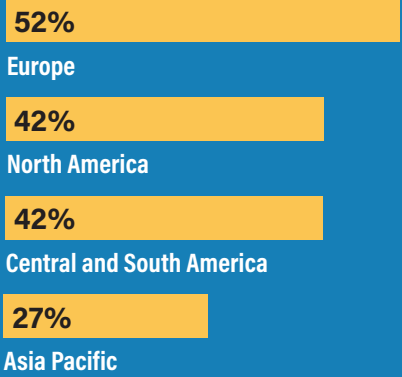
FORECAST COST PER MEETINGS ATTENDEE PER DAY IN 2019

SOURCE: CWT 2019 MEETINGS & EVENTS FUTURE TRENDS REPORT

DEFINING THE BOUNDARIES

When it comes to strategies for the year ahead, Europeans are the most likely to have an explicitly defined policy in place for meetings & events

SOURCE: 2019 GLOBAL MEETINGS & EVENTS FORECAST, AMERICAN EXPRESS MEETINGS & EVENTS



UNLUCKY IRISH

According to a national hotel rate forecast, Ireland is set to see the biggest price increase in 2019

IRELAND



FRANCE



BELGIUM, GREECE, NORWAY, SPAIN



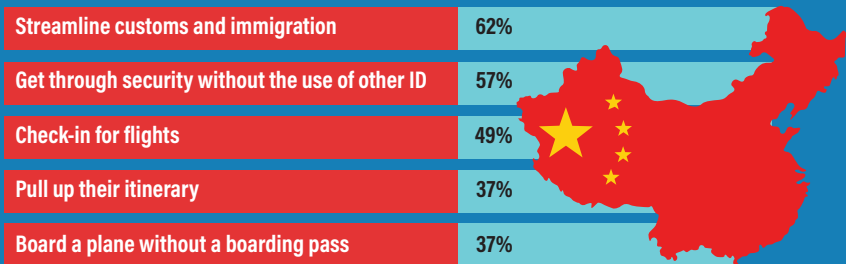
UK AND POLAND



CHECKLIST FOR CHINA

Business travel has been increasing across China, and according to 45 per cent of buyers in the country, this is expected to continue over the coming year

Top priorities and challenges for Chinese travel buyers in 2019



SOURCE: 2018 CHINA BUSINESS TRAVEL SURVEY, AMERICAN EXPRESS GLOBAL BUSINESS TRAVEL AND CHINA INTERNATIONAL TRAVEL SERVICE

5-10%

Forecast growth in global meetings and events demand



SOURCE: CWT 2019 MEETINGS & EVENTS FUTURE TRENDS REPORT

MORE MEETINGS

A survey of more than 700 meetings & events professionals found the majority expect to be planning more functions in 2019

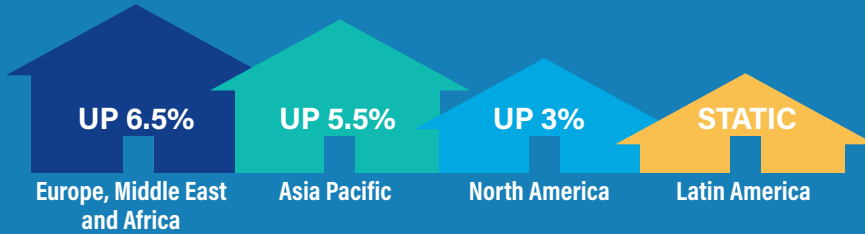


SOURCE: GLOBAL BUSINESS TRAVEL FORECAST 2019, AMERICAN EXPRESS GLOBAL BUSINESS TRAVEL



ASCENDING ACCOMMODATION

Travel and Transport forecasts significant increases in average daily rates at hotels



SOURCE: TRAVEL AND TRANSPORT PARTNER SOLUTIONS GROUP 2019 TRAVEL FORECAST



Oil prices took a sharp upward turn in 2018, and the increase is predicted to continue this year

Annual oil prices per barrel (US\$)

2012
\$112

2013
\$109

2014
\$99

2015
\$52

2016
\$44

2017
\$54

2018
\$73

2019 outlook
\$75

SOURCE: BCD TRAVEL 2019 INDUSTRY FORECAST

ROOM FOR GROWTH

With meeting sizes growing, planners are less optimistic about an increase in available meetings space than hoteliers



Event planners predict

0.7% RISE

Hoteliers foresee

2.2% RISE

SOURCE: 2019 GLOBAL MEETINGS & EVENTS FORECAST, AMERICAN EXPRESS MEETINGS & EVENTS



THE MORE THE MERRIER

Meetings around the world are expected to be both bigger and longer in the next 12 months

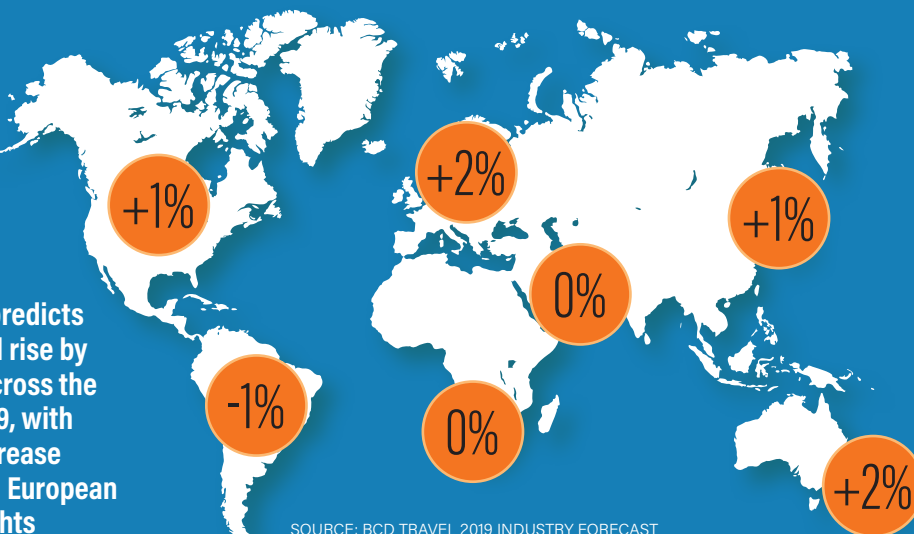
Attendee numbers to rise : Meeting length to increase

+0.1% : +0.1%
to 2.4% : to 1.9%

SOURCE: 2019 GLOBAL MEETINGS & EVENTS FORECAST, AMERICAN EXPRESS MEETINGS & EVENTS

PRICE HIKE

BCD Travel predicts air fares will rise by 1 per cent across the world in 2019, with a higher increase expected on European regional flights



SOURCE: BCD TRAVEL 2019 INDUSTRY FORECAST