



THE 2018

GLOBAL PLANNER
SOURCING REPORT

APAC

KEY FINDING

Event professionals across Asia and the Pacific region have seen their budgets increase but are planning fewer and smaller meetings and events, compared with a year ago.

What It Means for You:

Hotels and venues need to focus on providing all the right information, as well as differentiating themselves from the competition, as planners become even more diligent during the sourcing process. They should re-evaluate strategies to better promote flexible spaces, rather than just large ballrooms. Also, planners will be looking to use their additional budgets to elevate the event experience, so hotels must make sure to offer and promote unique activities and atmospheres.



KEY FINDING

The sourcing process continues to go digital. Venues' corporate websites are now tied with peer recommendations as the most influential resource. Search engines are close behind, and social media has doubled its influence from last year.

What It Means for You:

Now more than ever, APAC hotels and venues must be highly discoverable, visible, and appealing online, not only on their own websites but also on search engines, social media, review sites, and sourcing platforms.



KEY FINDING

Less than half of planners are certain of their venue at the beginning of the sourcing process.

What It Means for You:

Most group business is available for the taking and can be earned by any venue with great marketing plans and a strong digital presence.



KEY FINDING

Costs and discounts still mean a lot to planners when choosing a destination or venue — but they aren't everything.

What It Means for You:

Even when the cost can't be cut significantly, hotels and venues can attract group business by improving their proposals, ensuring clear, accurate pricing and honest negotiations; offering and promoting unique experiences on the property and in the local area; giving planners more value with extra amenities; and enriching the venue's atmosphere to provide a standout experience.



INTRODUCTION

Welcome to the APAC edition of Cvent's largest and most in-depth Planner Sourcing Report.



For our 2018 report, we surveyed 153 meeting and event planners across the Asia-Pacific (APAC) region, including Australia and New Zealand, to equip our hotel and venue networks with insights that will help improve their client services and to provide a deeper understanding of the planner decision-making process. The survey was conducted in fall 2017.

We've gained a wealth of insight and feedback about how these meeting and event planners source venues, what influences their decision-making, how their budgets have changed year-over-year, what goes into building a memorable experience for guests, and where venues and hotels are succeeding in providing great service and living up to expectations — and where they could improve.

The overall state of the industry across the APAC region is mixed, with planners seeing increases in event budgets but investment directed away from large conferences. Training sessions, trade show marketing, and regional meetings and events continues apace, likely because their effectiveness is easier to measure and quantify.

A more uncertain political and business climate, in which millennial workplace demands need to be met, has also created an environment where event demands have changed.

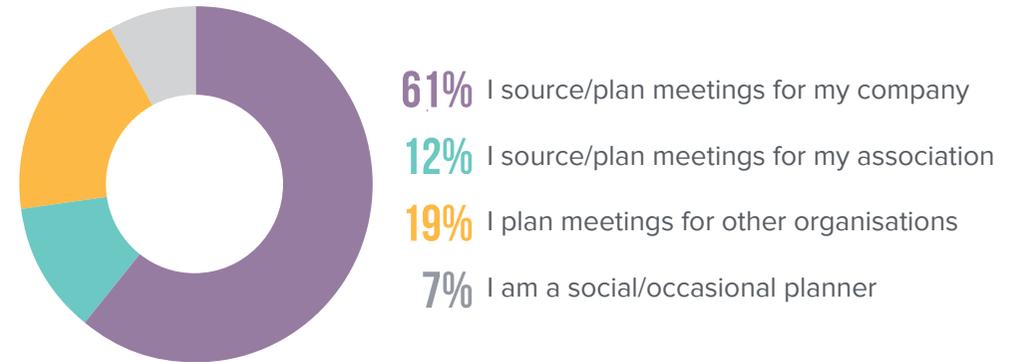
To understand what really matters to APAC meeting and event planners, explore our findings and use this report to enhance the effectiveness of your sales, marketing, and support teams for the seamless execution of compelling meetings and events.

Allow us to introduce you to our meeting and event professionals from the APAC region.

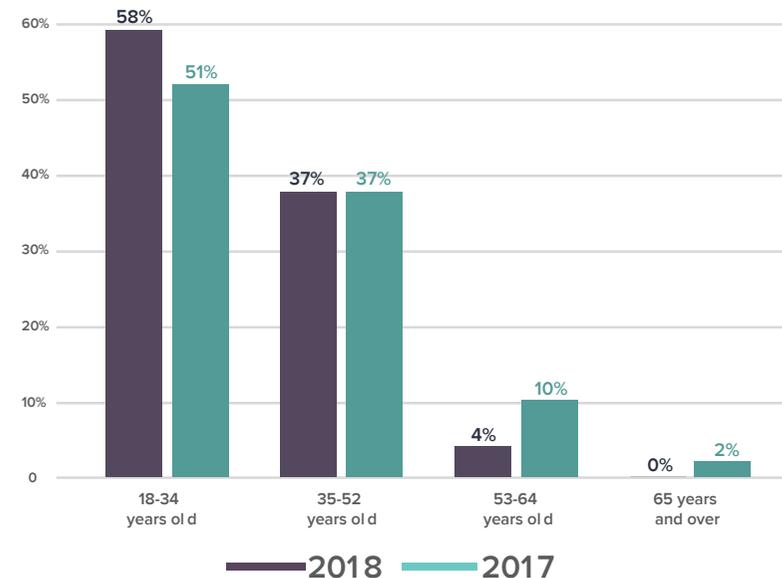
By enlarging our survey, we've seen a significant rise in the number of in-house planners interviewed (61% vs. 49% for 2017's report). The majority of our respondents (69%) come from across Asia, while a quarter (25%) live in Australia and New Zealand. However, 74% of the total number plan their meetings and events in Asia.

Millennials make up 58%, an increase of 7 percentage points over the proportion of 18- to 34-year-old respondents last year. Generation Xers (35 to 52 years old) make up 37%, while 4% are baby boomers (53 to 64 years old). The remaining 1% elected not to provide their age.

PLANNER BREAKDOWN BY TYPE



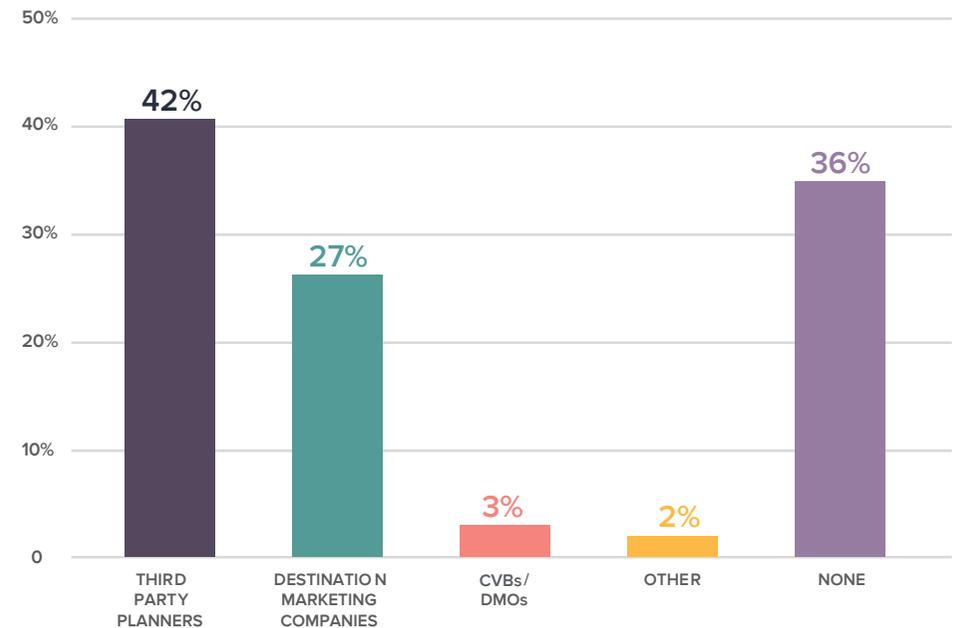
PLANNER BREAKDOWN BY AGE



When asked to select all the types of external agencies they use, 36% of APAC meeting and event planners said they do all the work themselves, mirroring our results in the Americas (37%) and across the globe (35%). However, unlike the American and global respondents, APAC planners appear to significantly favour third-party planners (42% reported using them) over destination marketing companies (27%).

Therefore, more than any other region, APAC hotels must focus on nurturing their relationships with third-party planners, who can bring a lot of repeat business to venues that give them good experiences.

EXTERNAL AGENCIES USED FOR SOURCING



This year's report has seen increases in planners organising just one to two (+4 percentage points) or three to five (+10 percentage points) offsite meetings annually.

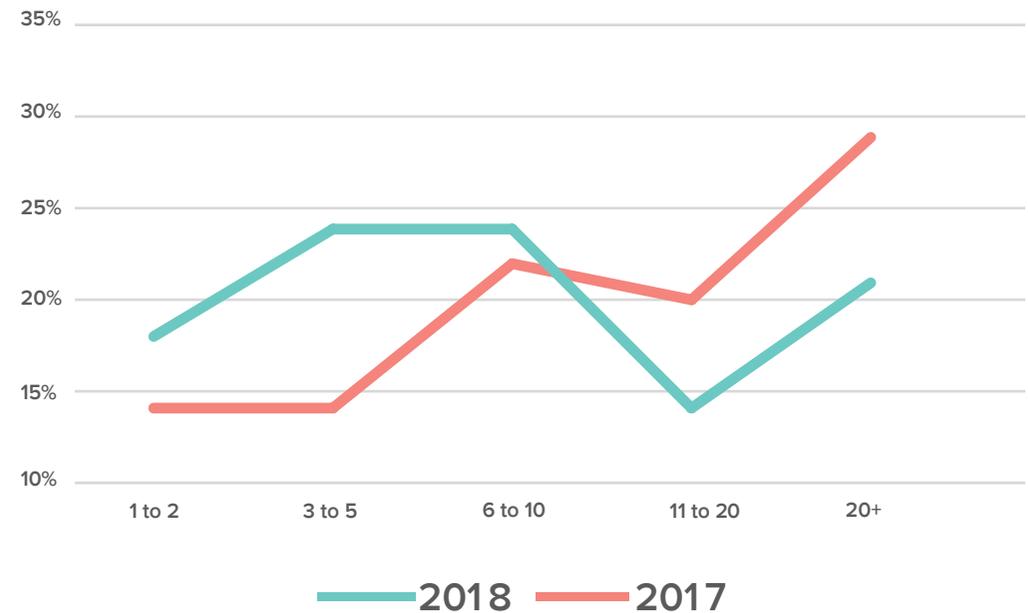
Even with fewer events, there is certainly still a need to invest in people, but the meetings and events tend to be smaller and more focused on regional strategy, training, and operations with short-term ROI objectives. This trend can be seen in both the types and size of the events our APAC respondents are organising.

The results show significant increases in those planning seminars (+13 percentage points), training sessions (+8 percentage points), and trade shows (+7 percentage points). Given that, it's unsurprising that events with one to 20 attendees have increased as well (+14 percentage points), while larger events for 101 to 500 attendees have fallen significantly, from 43% to 34%.

As smaller events become more important, it greatly affects planners' requirements when looking at venues. For instance, they are likely to be less concerned about the number of sleeping rooms and the size of the largest ballroom, but more interested in the flexibility of meeting spaces.

That need for flexible spaces helps explain why 70% of APAC planners choose hotel chains over independent or boutique properties, as chain properties often have a larger variety of meeting rooms and private dining options.

NUMBER OF EVENTS PLANNED PER YEAR



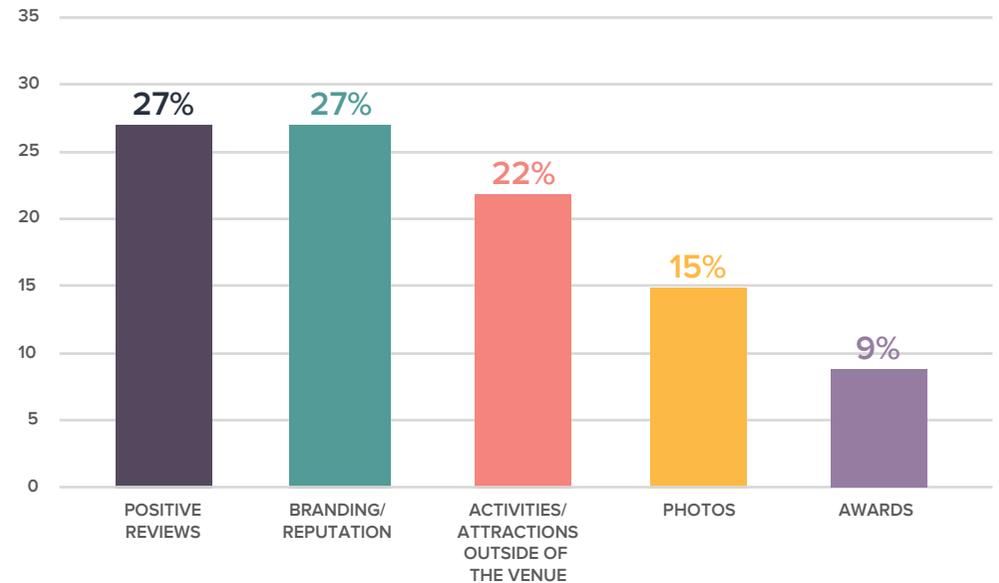
"It's important that the venue represents the purpose of the event, and sometimes it's difficult to find a place that matches your agenda accurately."

—Corporate Planner, Pakistan

Another likely reason that planners prefer chains is that there's an increasing desire for activities outside of the venue — 22% of respondents cited it as a top influence on their destination choices, behind only positive reviews and reputation. There's a perception among planners that the larger hotel groups offer better proximity and connections to local attractions, allowing for more integrated, robust event programs.

This is the first of many indications in our report that planners — as well as attendees — are seeking out unique experiences beyond the typical meeting, giving hotels and venues a chance to differentiate themselves. In particular, boutique and independent hotels, cultural venues, and sports arenas need to raise their games to communicate their abilities to host complete attendee programs, either in-house or in partnership with destination marketing companies, convention bureaus, other hotels, or agencies.

TOP INFLUENCES ON DESTINATION CHOICE

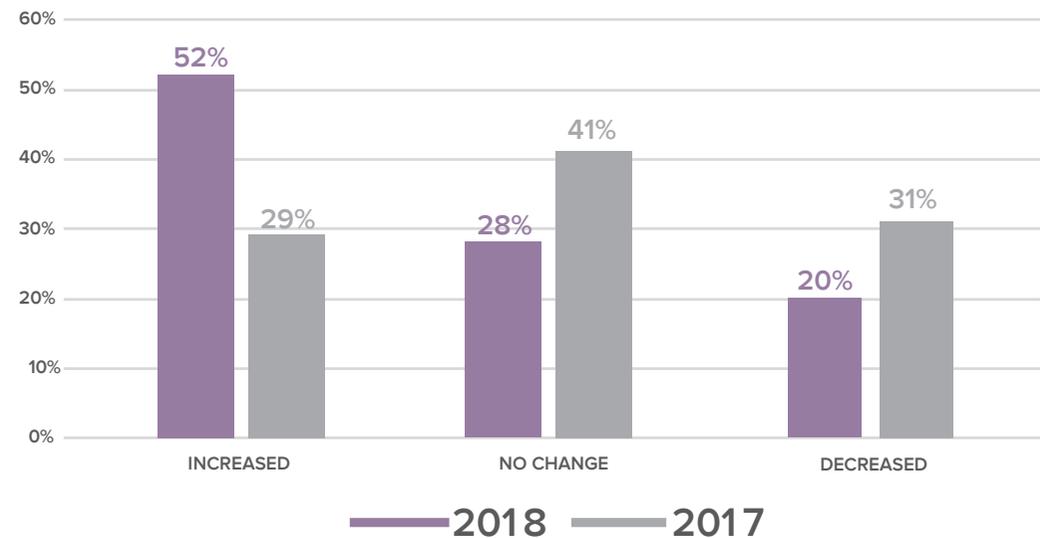


Despite indications that the number and size of events have decreased in the APAC region over the past year, our planners are not seeing concurrent drops in budgets.

On the contrary, over half (52%) of respondents say their event budgets have increased year-on-year, compared with only 29% in 2017's report.

Increased budgets on smaller, fewer events allows planners to put more focus on — and money toward — enhancing the event experience. By elevating the level of the technology, food and beverage, offsite activities, networking events, and educational opportunities, companies and clients will enjoy higher attendee satisfaction.

HOW HAS YOUR BUDGET CHANGED?



“Most of the time you want the venue, but you have to really negotiate to fit everything in the budget.”

— Corporate Planner, Philippines

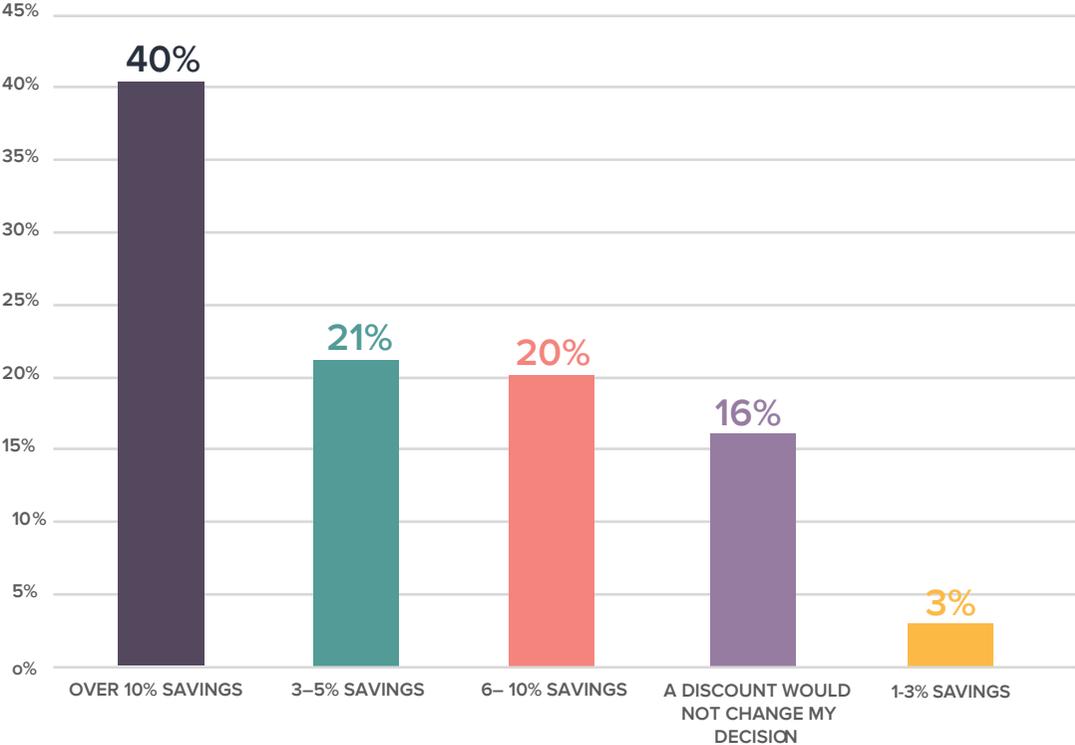
So what opportunities does growth in seminar and training spend present for hotels and venues?

Properties that offer visible and competitive pricing will never fail to attract the greater share of business, as our respondents continue to lament hidden fees and changing costs.

Discounting maintains its power, too, even as budgets rise. In fact, 84% of planners said they would be willing to switch to their second-choice venue for a cost savings of at least 1%.

“Negotiating a good price sometimes takes longer than finding the right venue.”
— Third-Party Planner, India

SAVINGS LEVEL TO SWITCH TO SECOND CHOICE



With more in-house corporate planners surveyed for the 2018 report, office-based resources such as desktop computers are still preferred across the APAC region and the world.

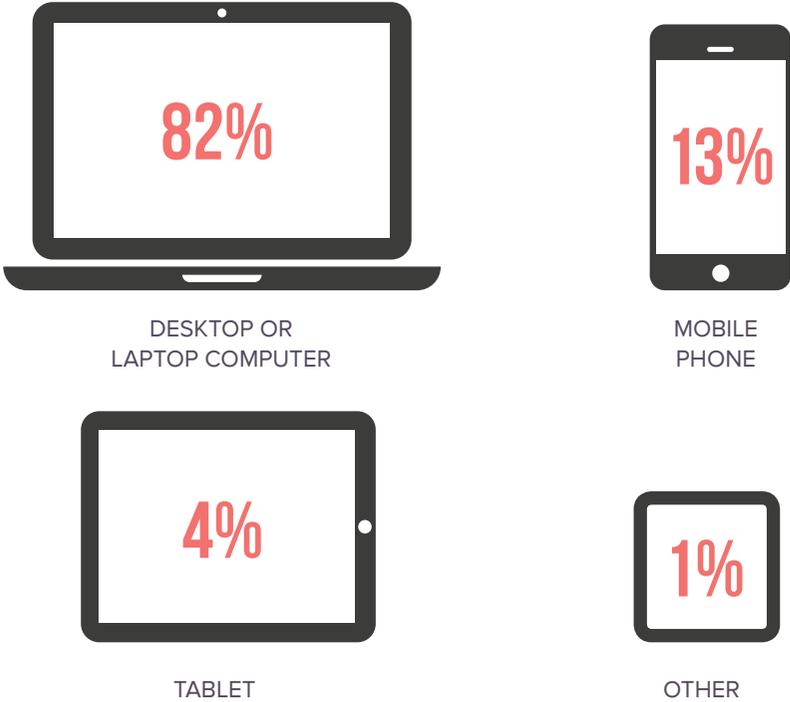
However, with an increased number of millennial respondents, 17% now report using smartphones and tablets to source venues. This is likely due to workplace behavioural trends evolving in line with the expectations of millennials and Generation Z employees. As a result, technology is enabling all planners (in-house, third-party, and association) to be more flexible and work on the go.

We certainly expect the percentages for sourcing on mobile devices to increase even more going forward. Venues and hotels therefore need to optimise their mobile presence and better integrate technology into their sales, marketing, and event support processes.

“Researching venues is a gruesome process that requires you to get all the information about the venue – location, accessibility, existing facilities, amenities offered, etc.”
— Social/Occasional Planner, Philippines

TYPICAL SOURCING DEVICE

2018



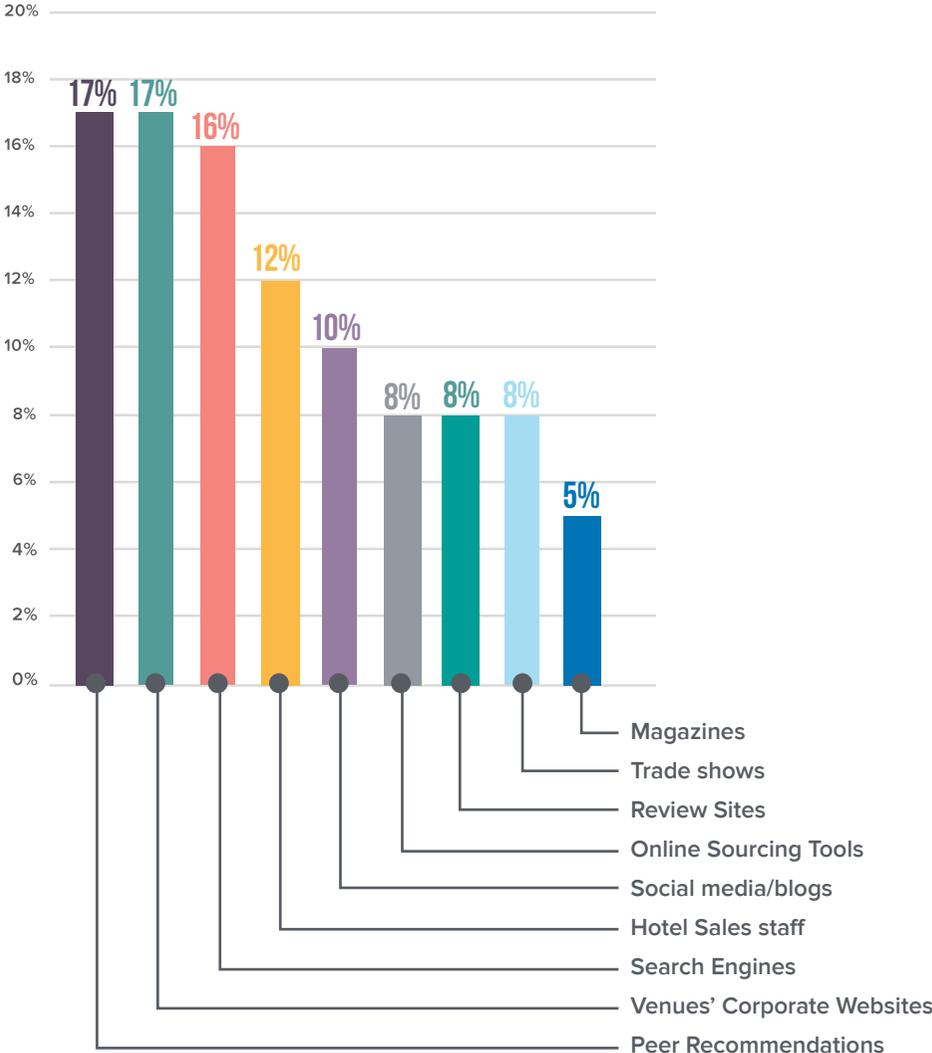
Regardless of whether planners use a computer or mobile device for sourcing, they are increasingly relying on internet resources during their decision-making. In fact, venues' websites are now tied with peer recommendations as their most influential resource, while search engines and social media are not far behind. Social media and blogs actually doubled in influence from last year's study.

Also, when APAC respondents were asked separately about the influences on their destination choices in particular, positive reviews were tied for the most-cited factor (27%).

This means that hotels, venues, and destinations need to closely monitor every aspect of their online presence to make sure they are visible and discoverable. Tools such as search-engine optimisation, paid marketing opportunities, and social media strategies will become only more important as digital resources continue to grow their authority.

TOP INFLUENCES ON SOURCING DECISIONS

2018



By analysing the overall sourcing experience, venues and hotels can again see the importance of maintaining an excellent reputation and a strong digital presence.

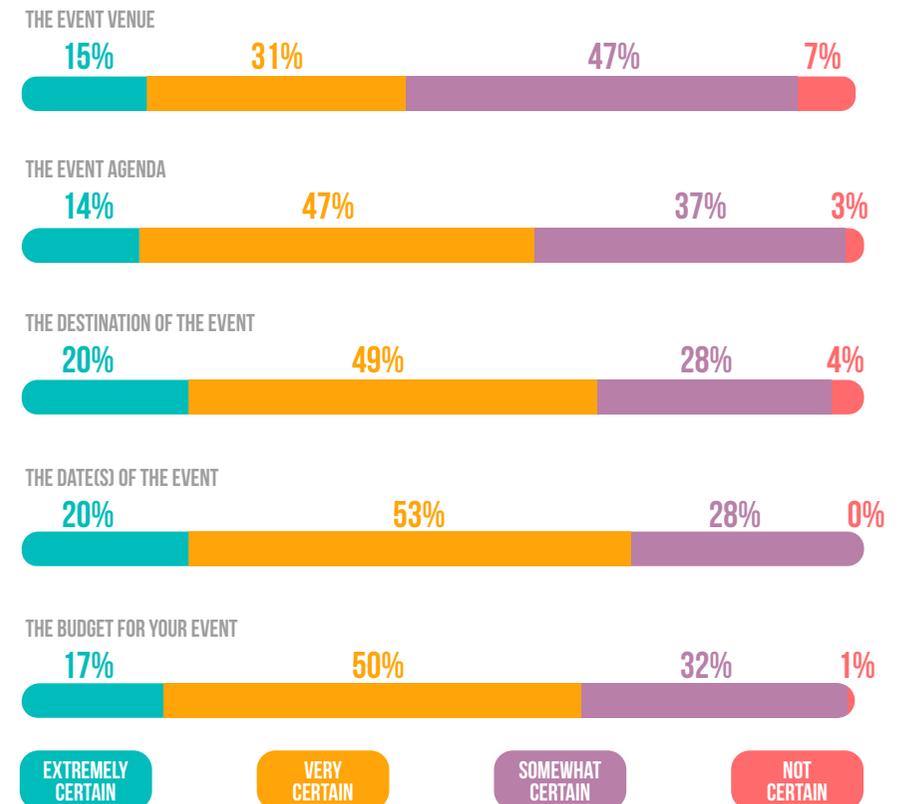
With 67% of APAC planners extremely or very certain of their budget for each event, venues need to prioritise clear and accurate pricing quotes with no hidden charges.

Planners' greatest uncertainty — and hotels' greatest opportunity — is in their venue choice: Less than half are extremely or very sure of it at the start of the sourcing process. That opens the door for hotels and venues that can be found online easily and provide planners with all the information they need.

“There is always a lot of back and forth to gather information, resulting in numerous emails from one supplier with different bits of information. When you are receiving quotes from multiple suppliers, some information may get missed, and it makes it harder to compare.”

— Third-Party Planner, New Zealand

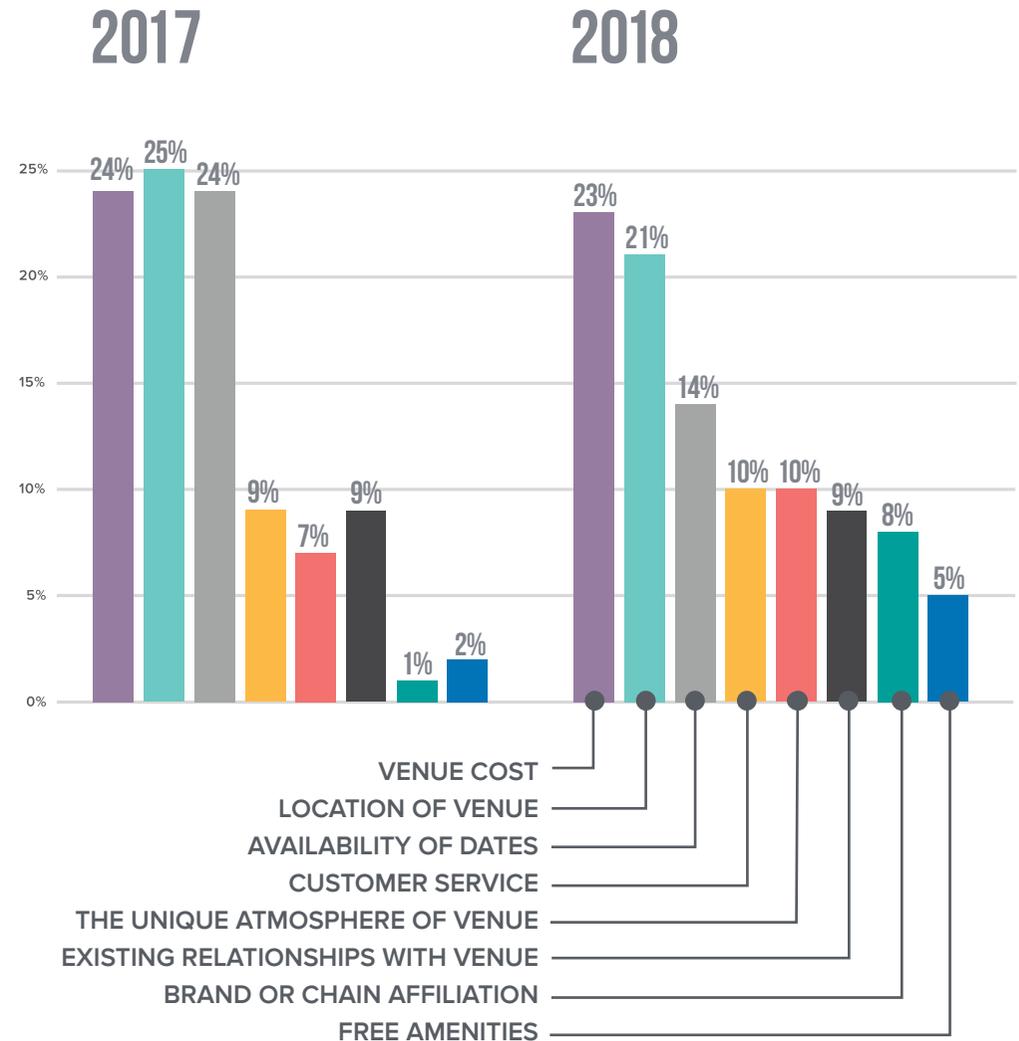
WHEN YOU BEGIN SOURCING YOUR EVENT, HOW CERTAIN ARE YOU OF...



Hotels have more chances than ever to sway planners' decisions by understanding what influences their booking decisions. Unsurprisingly, cost and location are the top factors, as they are often set from the beginning of the sourcing process. Cost, however, may not simply be a case of remaining competitive, as planners tell us that they also factor in how transparent the pricing is, how accurate the quotes are, how quickly quotes are received, and whether honest negotiation is an option.

The wide distribution of the other responses presents a great opportunity for hotels and venues. When cost and location are relatively equal among competitors, there are other factors that hotels can improve to set themselves apart. More specifically, influencers rising in importance include free amenities such as Wi-Fi and leisure facilities for event attendees (+3 percentage points), indicating that hotels have options when they are not able to offer deep discounts; including extra amenities in an event package can help give planners the value they're looking for without actually lowering the final cost. Hotels should also concentrate on the increases for customer service (+1 percentage points) and atmosphere (+3 percentage points), since those factors are among the easiest to improve.

MOST IMPORTANT FEATURES INFLUENCING BOOKING DECISION



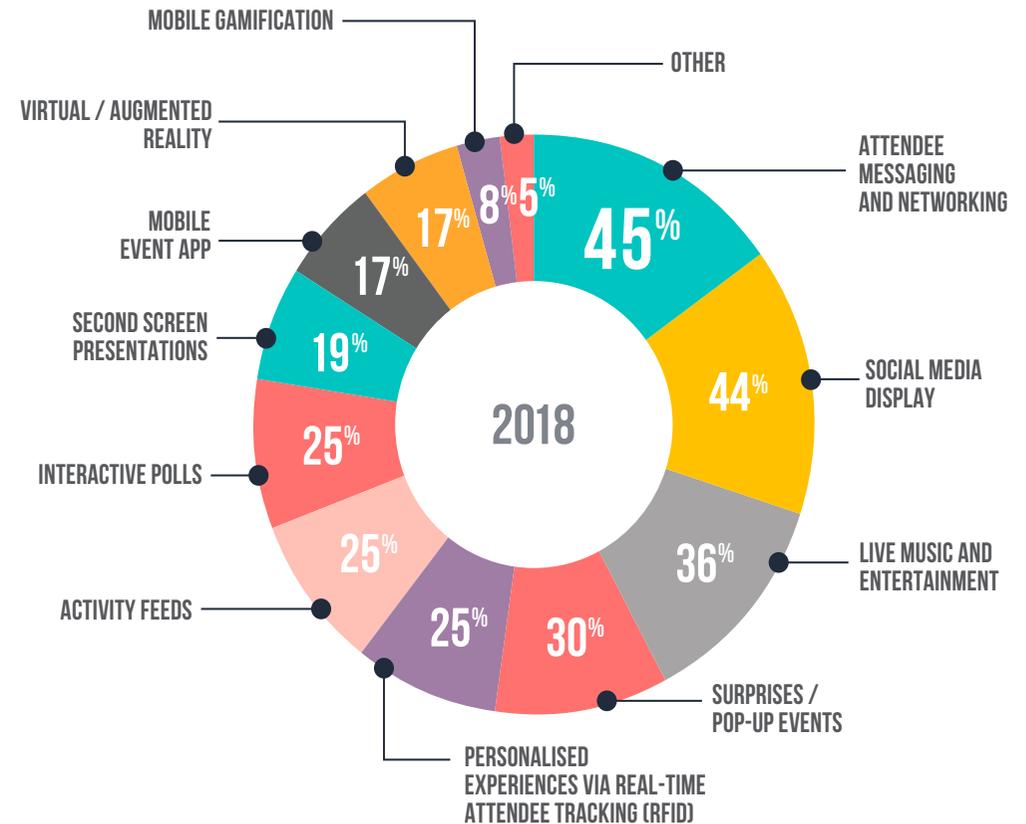
Planners' interest in atmosphere again proves the significance of the event experience for attendees, which is constantly evolving as trends in technology and generational expectations change.

Across the globe, the importance of integrating social media displays has grown steadily over the past few years, and for APAC planners, it now ranks as the second-most-important strategy for creating memorable experiences, behind only attendee messaging and networking.

This is why Wi-Fi speeds and venue connectivity are so important for today's planners, who expect those features when choosing where to stage a particular meeting or event.

Over the next few years, we anticipate that the use of mobile event apps (17%) will increase across APAC, in line with the rest of the world.

STRATEGIES FOR MEMORABLE EXPERIENCES



AREAS FOR IMPROVEMENT

Key feedback from last year's report showed that venues outside North America often don't provide answers to every question asked on the RFP.

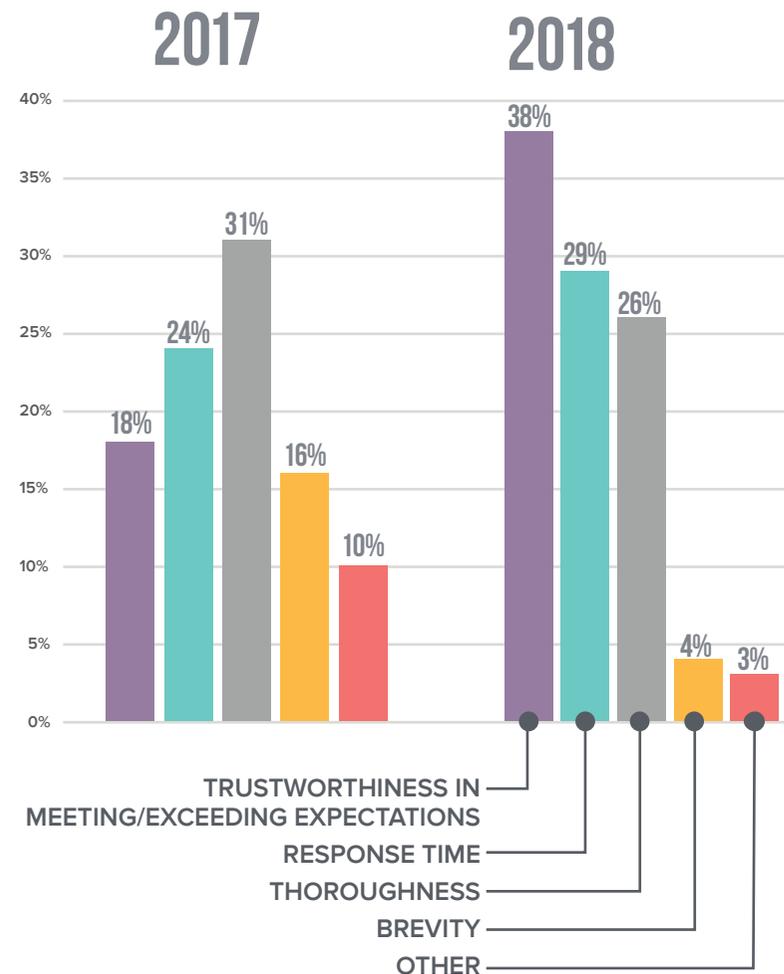
This year, however, the APAC region has seen improvements in the thoroughness and brevity of RFP responses, reflected by drops of 4 percentage points in thoroughness complaints and 12 percentage points in complaints relating to conciseness and the language used by venues to explain their processes. These two common global issues can be further improved through investment in training and talent to ensure easy-to-understand, thorough, and accurate responses, making room to win more business.

The largest increase in planner concerns, meanwhile, was trustworthiness in meeting and exceeding expectations, which jumped 20 percentage points from last year. Many respondents cited issues such as inaccurate information and changes being made after the proposal had been agreed upon and the contract signed. This indicates that there needs to be further work to earn planners' full trust. Efforts to boost transparency, responsiveness, and customer service will likely lead to improvements in this area as well.

“Some venues ignore all the specifics of the brief we submitted, indicating to me that they didn't actually bother to read it. That implies a lack of attention to detail that wouldn't bode well for the event itself.”

— Corporate Planner, Singapore

WHAT COULD HOTELS MOST IMPROVE WHEN RESPONDING TO YOUR RFP?

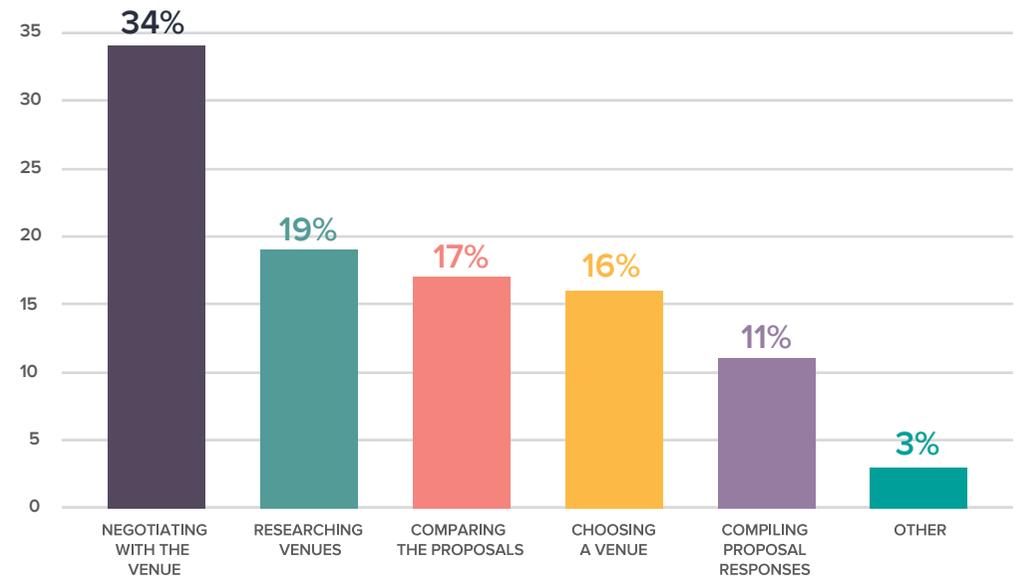


AREAS FOR IMPROVEMENT

Those concerns also led to more planners (34%) reporting that negotiating with a venue is the most difficult stage of the sourcing process. Hospitality professionals can improve this process by training sales staff to provide clear and detailed answers to all fielded questions, setting targets for faster response times, and ensuring transparent and accurate pricing.

Meanwhile, fewer APAC planners are citing comparing and compiling proposals (-7 and -4 percentage points, respectively) as the most difficult stage, likely a result of the improved thoroughness of hotels' responses and wider adoption of online sourcing platforms that can standardise those responses.

MOST DIFFICULT SOURCING STAGE



“I always find negotiating with a venue can be difficult. It all depends on the requirements of the client and if the venue is willing or able to meet those expectations.”

— Corporate Planner, New Zealand

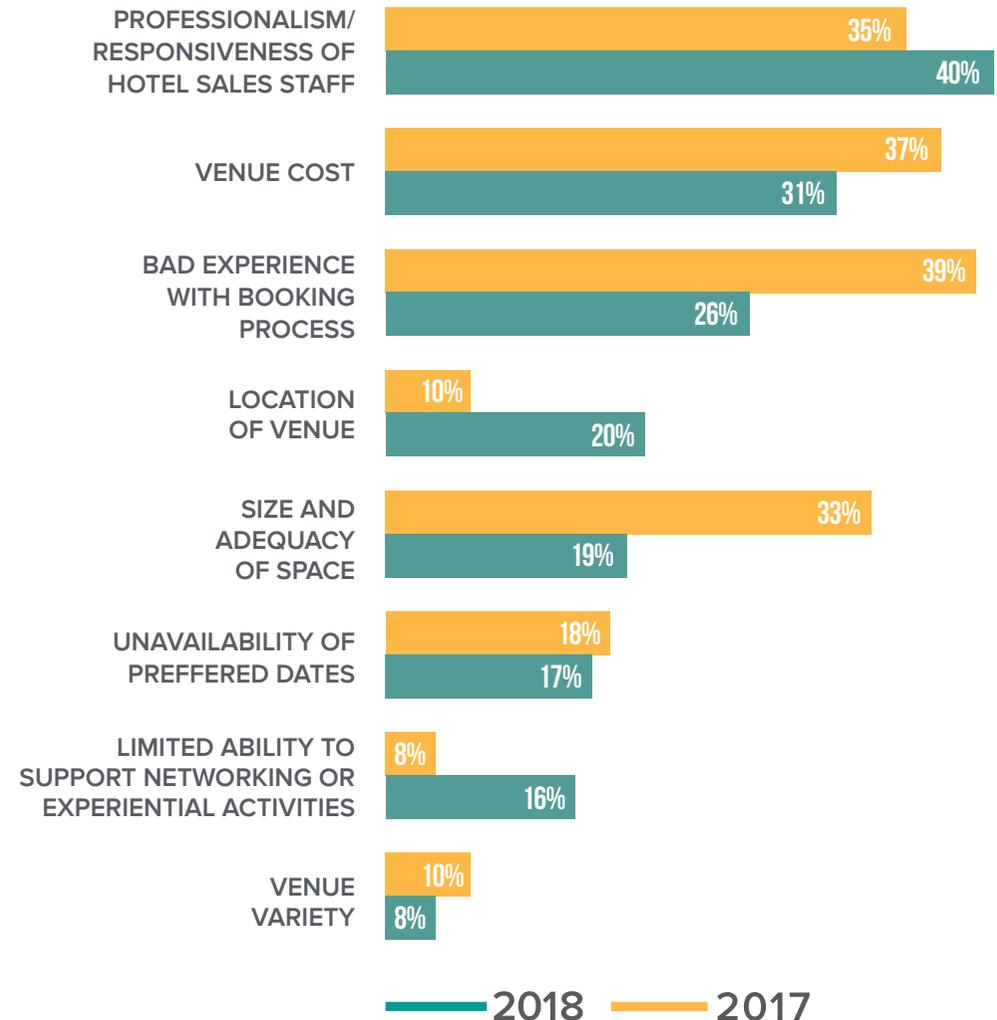
AREAS FOR IMPROVEMENT

In fact, as a whole, APAC planners are finding that booking processes have made significant progress. In this year's report, 26% of respondents cited a bad experience during booking as a factor preventing their return to a venue, compared with 39% last year. However, it is still the third-most-cited reason, meaning hotels need to do more to streamline their processes and ensure transparency in their interactions with planners.

The latter will be key throughout the event life cycle, actually, because professionalism has replaced the booking process as the biggest reason planners do not return to a venue. It saw an increase of 5 percentage points year-on-year.

Also worth noting is the large increase — 8 percentage points — of respondents who don't return to a venue because of its limited ability to support experiential activities. This is yet more evidence that planners want to create well-rounded, integrated agendas. While hotel sales staffs don't have control over a property's location — and therefore can't change the nearby attractions and activities — they can certainly add and promote unique experiences and activities onsite.

TOP FACTORS PREVENTING RETURN TO VENUE



WHAT WAS THE MOST MEMORABLE EVENT YOU PLANNED IN THE PAST YEAR, AND WHY?

“A conference for 300 people. It was held at a new location with a professional and helpful hotel staff and a great view of the city. Everything worked like clockwork. We could do so much more once we moved into the event app space.”

— Corporate Planner, Australia

“We do an annual roadshow, where we had 700-plus attendees in Auckland — an awesome turnout, considering it was only our second year. The event had a really positive response from attendees.”

— Social/Occasional Planner, New Zealand

“A RECENT PRODUCT LAUNCH. IT FEATURED ACTIVITIES SUCH AS INTERACTIVE GAMES AND A VIRTUAL TOUR, AND ALMOST THE WHOLE VENUE WAS FILLED WITH LED WALLS.”

— Corporate Planner, Philippines

“We had a networking and coffee pop-up lounge at a conference. It was innovative and new, and we don’t get to do that sort of thing often in corporate events.”

— Corporate Planner, Australia

“OUR STRATEGIC LEADERSHIP SUMMIT IN MAURITIUS. IT WAS A GREAT PROGRAM FOR OUR SENIOR LEADERSHIP TEAM, AND THE MAIN REASON WAS THE VENUE. THERE WAS LEARNING DURING THE DAY AND FUN IN THE EVENINGS, ALL WELL PLANNED BY HOTEL STAFF.”

— Corporate Planner, India



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