



HB

HELMSBRISCOE

TRENDS

INDUSTRY SNAPSHOT



- In 2023, we began to see a trend towards more of a “normalization” in industry operations and performance.
- In the United States, RevPAR grew by nearly 5% and occupancy finished at 63%, roughly 3% lower than 2019.
- In 2024, we expect to see additional growth, with RevPAR increasing by roughly 3%, driven by ADR growth of approximately 2%. We also expect to see brands returning to traditional service levels as they look to reinforce their value propositions.
- Group demand was strong in 2023, while the leisure demand that led the way for the last several years, particularly in the luxury segments, moderated.
- EMEA showed a strong return to the group marketplace in 2023, further buoyed by inbound international travel. We anticipate inbound international travel to the US will grow in 2024, narrowing the gap in disparity of outbound travelers.
- Hotel brands are predicting even stronger group bookings in 2024 than 2023. Key urban destinations are regaining popularity as resort destinations stabilize, and short-term bookings continue to outpace long-term bookings.
- Companies and individuals have prioritized in-person experiences and are protecting their travel budgets; therefore, we anticipate RevPAR will defy historical trends and continue to show growth, even if the economy should experience a minor recession.

COMPANY OVERVIEW



**Founded in 1992 with a
revolutionary business model:
100% client-centric**

- Representing clients' interests in the marketplace
- Acting on behalf of client
- Client in control of all decisions
- Fully transparent

HB BY THE NUMBERS

The Global Leader in Meetings Procurement



- HB is the largest meetings procurement company in the world
- In 2023, HB booked \$1.67 billion in room revenue, 6.8 million room nights, and 36,500 programs
- HB contributed roughly \$3.1 billion in gross meeting spend to the hospitality community in 2023
- HB has a global presence with more than 1,400 Associates in 60 countries

WHAT WE DO

STRATEGIZE	EVALUATE	NEGOTIATE	EXECUTE
<ul style="list-style-type: none">▪ Work with client to set meeting objectives, budget and requirements▪ Research client meeting history▪ Collaborate on RFP development to customize for client needs and priorities	<ul style="list-style-type: none">▪ Develop and submit RFPs based on client needs and priorities▪ Utilize HB resources to identify appropriate venues▪ Compile and organize hotel data to present to client▪ Evaluate offers from venues	<ul style="list-style-type: none">▪ Engage in negotiations with select venues▪ Research HB exclusive offers and promotions for client▪ Recommend strategies to reduce cost and minimize risk	<ul style="list-style-type: none">▪ Assist with hotel selection▪ Support the hotel contract process▪ Communicate client decision to venues▪ Provide problem resolution assistance and event follow-up
			

SUPPLIER-FUNDED



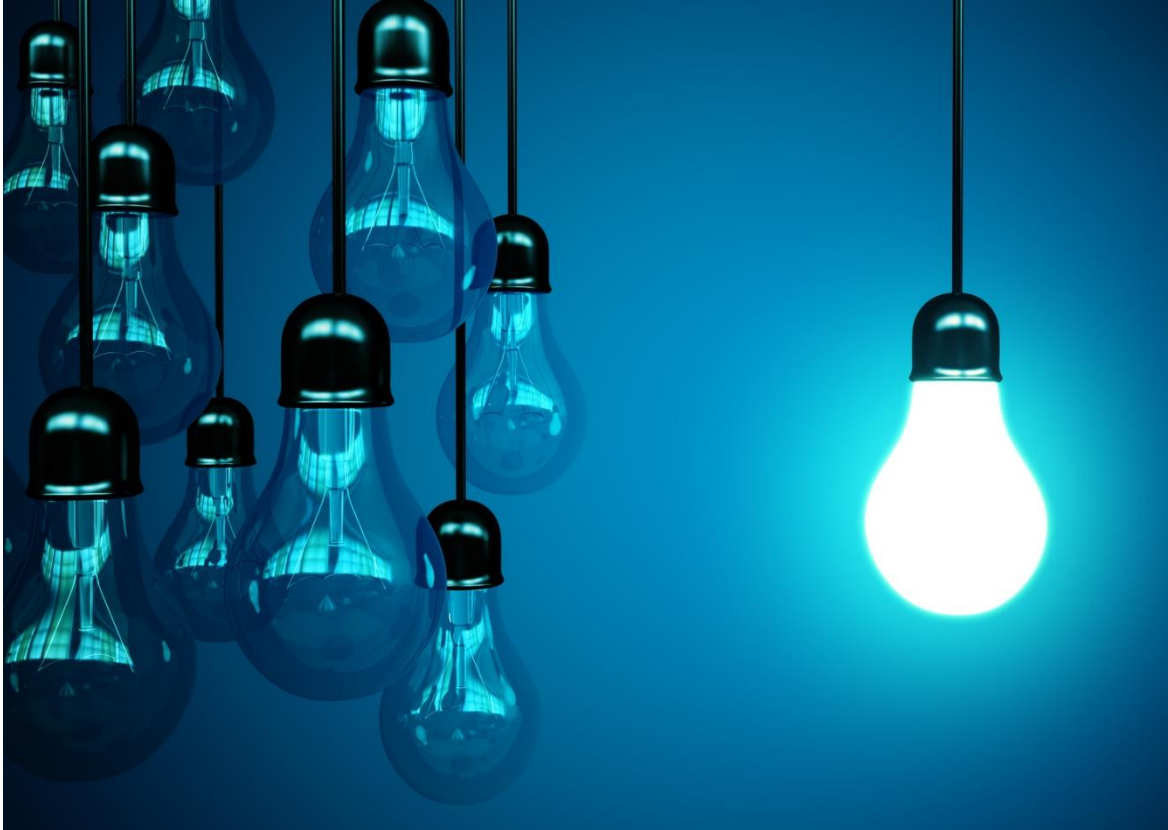
- Substantially lower overall client cost and risk
- More than 303,000 venues in the HB Connect database via group business which ensures the viability of a supplier funded model
- HelmsBriscoe receives compensation from the hotel chosen by clients for their meeting
- Transfers much of the cost of procurement from buyer to seller
- Transparent to all
- Client verifiable rates and savings

GLOBAL EXPERIENCE



**HelmsBriscoe
has booked
business with
more than
73,500
properties in
158 countries**

WHAT MAKES HB DIFFERENT?



- Experienced professionals
- Purchasing power
- Collective knowledge
- Industry partnerships
- No signed contracts
- No cost to our clients
- Proprietary technology
- Personal Service

BUYING POWER



HelmsBriscoe delivers more meetings, revenue and group room nights to the hotel community than any other source. HB is the largest producer of rooms for all major hotel brands.

- Hotels approach each HB client and their meeting as if they were a billion-dollar customer
- We have the ability to elevate issues to the highest level of the supplier community
- As the largest source of group rooms, HB clients benefit from special offers not available to others
- Risk mitigation
- Cost savings and value add

INDUSTRY RELATIONSHIPS

Adding HelmsBriscoe to the venue finding process strengthens our clients' negotiating power as they now have the largest producer of group room revenue in the industry behind their meetings.

Examples of the type of leverage and benefits we are able to offer our clients include:



- Preferred rates and promotions
- Up-to-date property and industry information and intelligence
- Assistance with contract clauses
- Favorable resolution of contract issues (i.e., cancellation and attrition)
- Invitations to hotel client events and education familiarization trips

INDUSTRY RELATIONSHIPS

PARTNER HOTELS

HelmsBriscoe is the largest producer of group rooms for all major hotel brands. A few examples of the more than 73,500 hotels HB has booked business with include, but are not limited to, the following brands:



INDUSTRY RELATIONSHIPS

HELMSBRISCOE'S DESTINATION PARTNER PROGRAM



- Inclusive of CVBs/DMOs around the globe
- Combines the power of the HB Associate network with the power and local expertise of the destinations
- Provides HB clients with exclusive promotions and services such as:
 - Site inspection assistance
 - Marketing assistance
 - Value added offers

INDUSTRY RELATIONSHIPS

PARTNER CRUISE LINES

HB Cruises is the group procurement leader for a variety of major cruise lines. A few examples of the cruise lines HB Cruises has booked business with include, but are not limited to, the following:



COLLECTIVE KNOWLEDGE

GLOBAL SPAN	HB INSITE	HB CONNECT	HB PROMOTIONS
<ul style="list-style-type: none">HB has the largest distribution of Associates: 1,400 in more than 60 countries	<ul style="list-style-type: none">Knowledge and database & Q&A systemDomestic and International Market Information	<ul style="list-style-type: none">HelmsBriscoe RFP PlatformRate History ResearchSearchable Hotel DatabaseClients have the opportunity to recover cancellation or fees	<ul style="list-style-type: none">HB clients benefit from HB-exclusive offers/promotions from our partner hotels
			

CLIENT-CENTRIC



We represent all venues and destinations and take a customized approach to each client's needs.

- Every client has varied needs. With a customized approach to buying, HB ensures the selection of the best option for the client. This is not the case with sourcing teams or standardized contracts.
- Extensive reporting and analysis capabilities
- Full-service meeting management available through HB ResourceOne
- HB SMM: Strategic Meetings Management – the strategic management of enterprise-wide meeting-related processes, spend, volume, and standards

MISSION STATEMENT

HelmsBriscoe's mission is to be the most highly respected, trusted and sought-after meeting resource firm worldwide. We are committed to exceeding the expectations of our clients and travel partners by providing excellent value and exceptional customer service.



THANK YOU

HB