Destination Analysts

DESTINATIONS INTERNATIONAL

miles PARTNERSHIP

The DMO & the Future of the Meetings Industry

2017

Research conducted by Destination Analysts, Inc. for the DMO industry in partnership with Destinations International & Miles

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Research Overview & Objectives

This report presents findings of a study of the meetings industry—specifically meeting planners' assessment of the current state of the industry, feelings about the benefits and challenges anticipated to be brought forth in the future, and the ideal functions and leadership of the DMO in the meeting planning process. This research was conducted by Destination Analysts, Inc. in partnership with Destinations International and Miles Partnership.

The core objectives of this research are summarized below.

- Develop a deeper understanding of the value DMOs can provide meeting planners (across event types and sizes) based on current circumstances and anticipated changes in the industry
- Examine metrics meeting planners use to evaluate and report the success of their meetings and events
- Explore existing challenges in the industry and how the industry may evolve
- Identify recommendations for how the DMO and meeting planner best work together towards the ultimate success of the destination and the event.
- Provide participating DMOs a benchmark of their meetings destination brand performance

Methodology

To address the objectives of this research an online survey of meeting planners was conducted. An invitation to take this survey was sent via email to Destinations International list of meeting planner contacts as well as to Destination Analysts meeting planner panel. A full spectrum of meeting and event planners were invited to take the survey, including corporate, association, and third-party planners, as well as those who plan for city-wides and those solely focused on self-contained meetings. Respondents were screened for meeting planner responsibilities and/or destination decision influence. Those meeting planners who completed the survey were provided a $25 Amazon.com e-gift card for their participation. In total, 569 completed surveys were collected.

Findings from the survey were then explored in greater depth with a series of in-depth interviews with 20 meeting planners. Again, a wide range of meeting planners were included in these interviews order to maximize included perspectives. These interviews were conducted via online video conference, moderated by Destination Analysts staff.

About This Report

In the remainder of this report, data from the survey findings is presented as follows:

- The aggregate total is shown in the chart on the left
- On the right, a data table shows the findings broken out by meeting planner type:

1. Corporation
2. Third-Party
3. Association
4. Self-Contained
5. Citywide

Meeting Planner Profiles

This section of the report summarizes the key professional characteristics of the meeting planners in this study

Decision-Making Responsibility

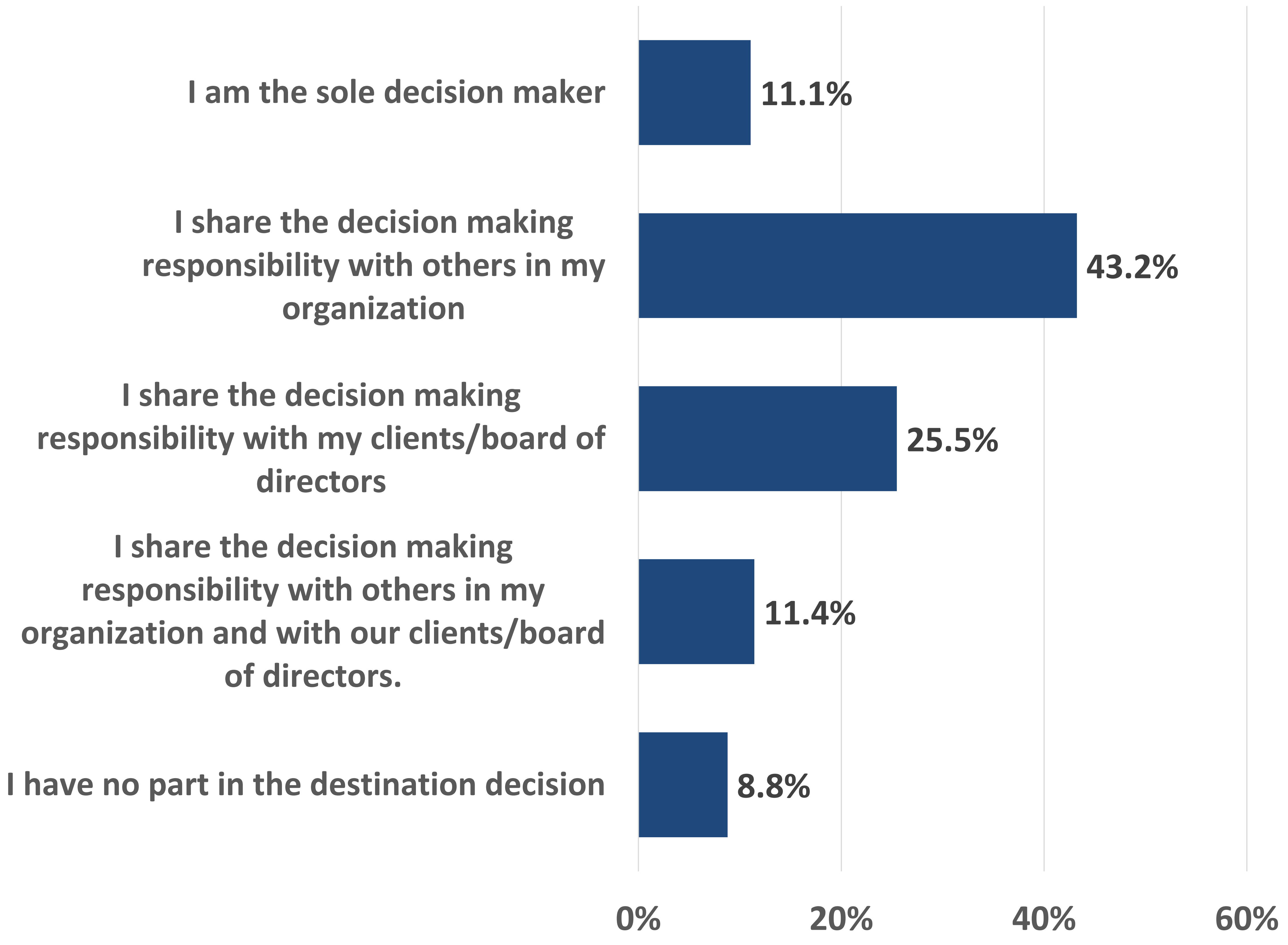
Nearly three-in-five planners surveyed exclusively plan meetings for the business entity by which they are employed (58.0%). Just over one-quarter of planners surveyed were third-party meeting and events planners (26.5%).

	SELF CONTAINED	CITYWIDE
I plan meetings exclusively for the business entity by which I am employed	58.8%	60.8%
I am a third-party meeting and events planner	28.5%	35.1%
Others in my organization are meeting planners, but I am involved in the planning decisions	2.8%	0.0%
I am a volunteer planner for my organization/group	4.7%	0.0%
I work for an association management company	4.4%	2.7%
I am not regularly involved in the planning of meetings and/or events	0.8%	1.4%

Which best describes you? (Select one) Base: 569 Completed Surveys

Role in Destination Selection

Destination selection is most often a shared decision. Just over one-in-ten planners are the sole decision makers when it comes to selecting the destinations for the meetings they are responsible for (11.1%), with those that plan citywides the likelies to select a destination independently (18.9%).

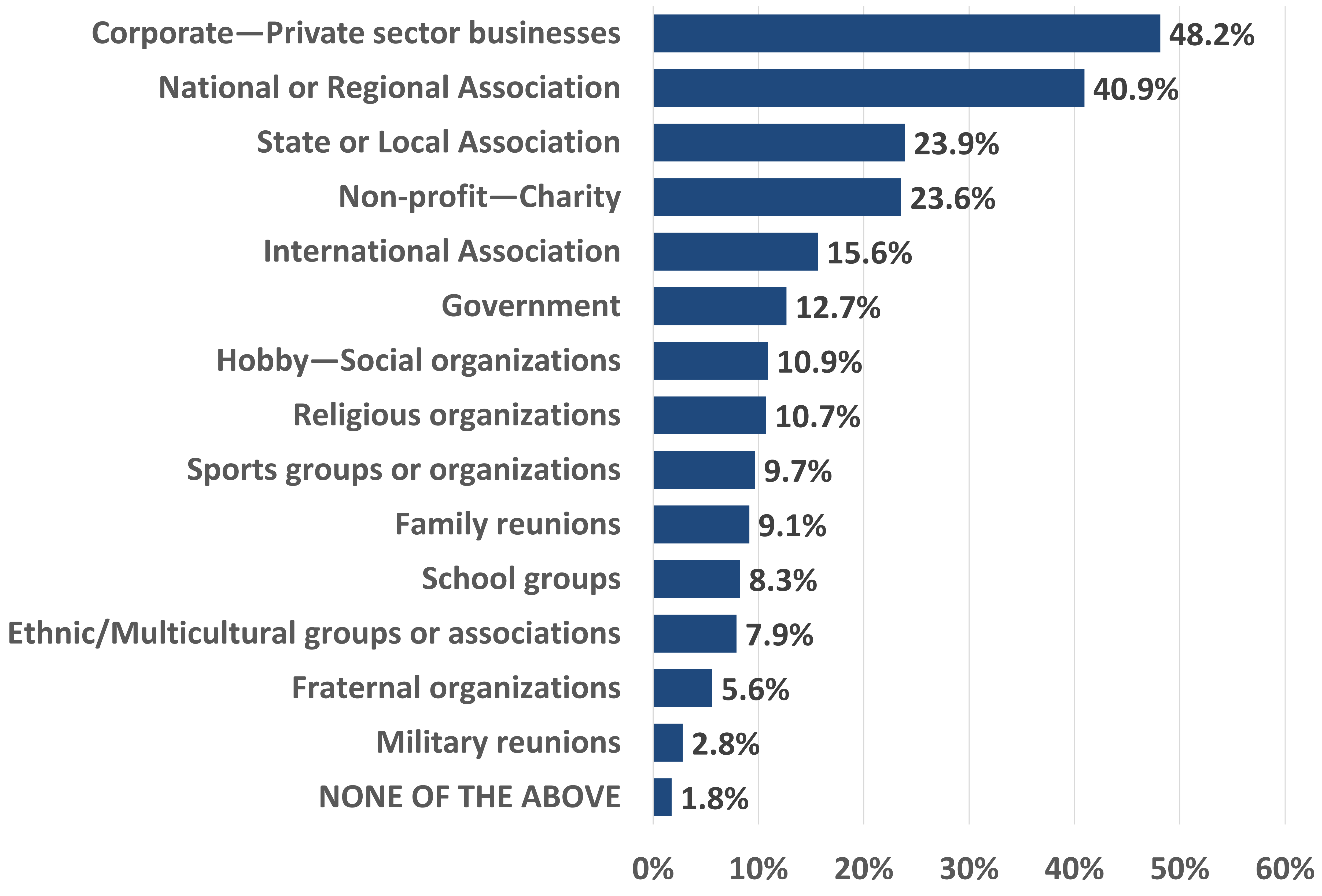


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
I am the sole decision maker on the destinations we select	13.6%	7.3%	3.8%	10.9%	18.9%
I share the destination decision making responsibility with others in my organization or company	59.4%	11.9%	15.4%	42.2%	43.2%
I share the destination decision making responsibility with my clients/board of directors	12.4%	51.7%	53.8%	27.2%	20.3%
I share the destination decision making responsibility with others in my organization or company as well as with our clients/board of directors.	9.7%	13.2%	19.2%	12.2%	13.5%
I have no part in the destination decision	4.8%	15.9%	7.7%	7.5%	4.1%

Which best describes your role in selecting the destination for the meetings planned by you and/or your organization? Base: 569 Completed Surveys

Types of Business/Groups

Approximately half of all meeting planners surveyed (48.2%) plan corporate meetings, and four-in-ten plan meetings for national or regional associations (40.9%).

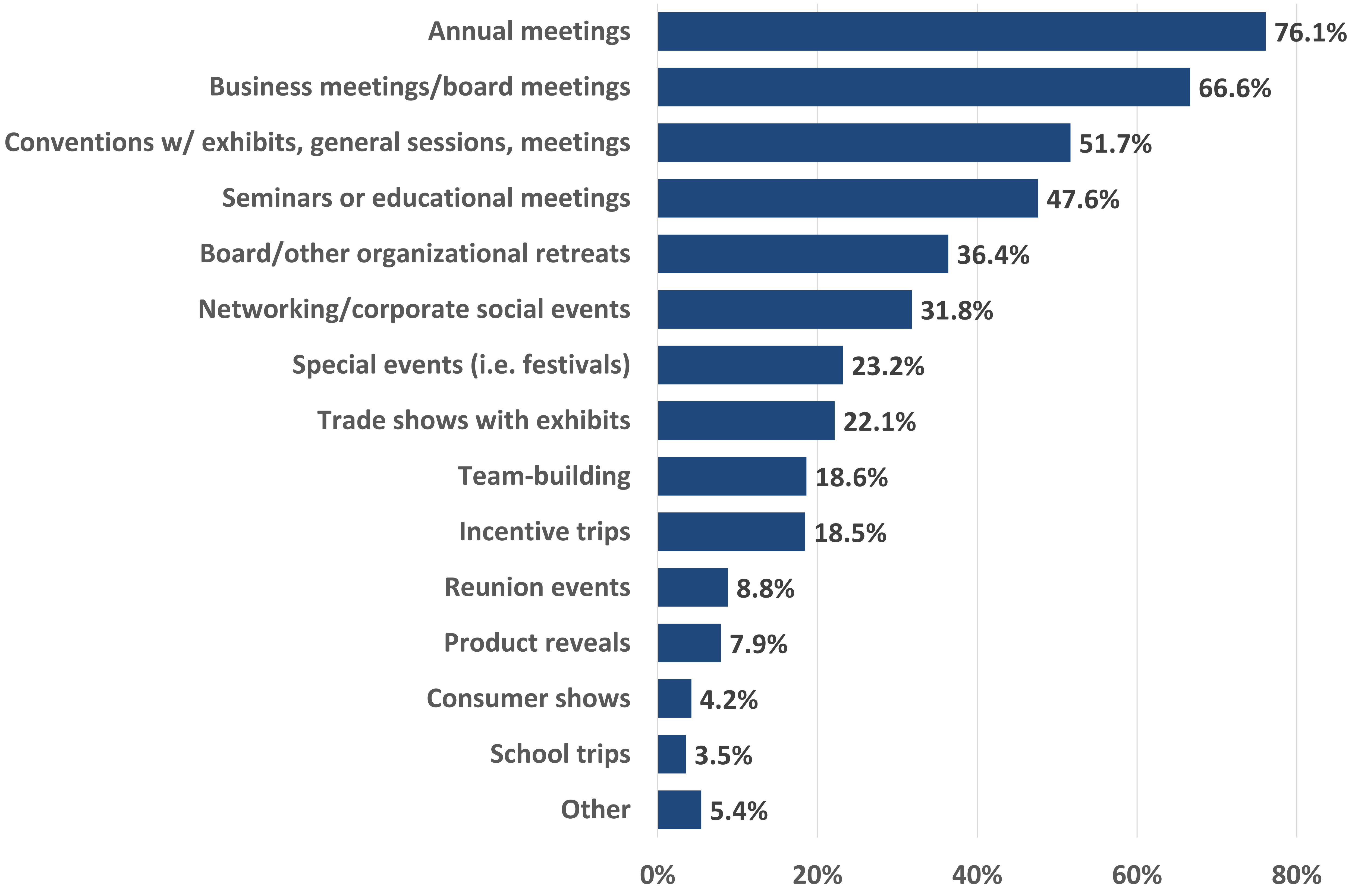


	SELF CONT.	CITYWIDE
Corporate—Private sector businesses	54.9%	56.8%
National or Regional Association	40.2%	48.6%
State or Local Association	24.1%	31.1%
Non-profit—Charity	21.5%	25.7%
International Association	16.3%	23.0%
Government	12.4%	16.2%
Hobby—Social organizations	10.4%	16.2%
Religious organizations	9.6%	9.5%
Sports groups or sporting organizations	11.7%	13.5%
Family reunions	8.3%	10.8%
School groups	8.8%	9.5%
Ethnic/Multicultural groups or associations	7.8%	12.2%
Fraternal organizations	5.4%	13.5%
Military reunions	2.8%	2.7%
NONE OF THE ABOVE	1.6%	0.0%

Which types of groups do you most typically plan meetings for? Base: 569 Completed Surveys

Types of Meetings

Annual meetings (76.1%) and business/board meetings (66.6%) are the most common types of meetings planned. In addition, about half of meeting planners surveyed are responsible for conventions (51.7%) and/or seminars and educational meetings (47.6%).

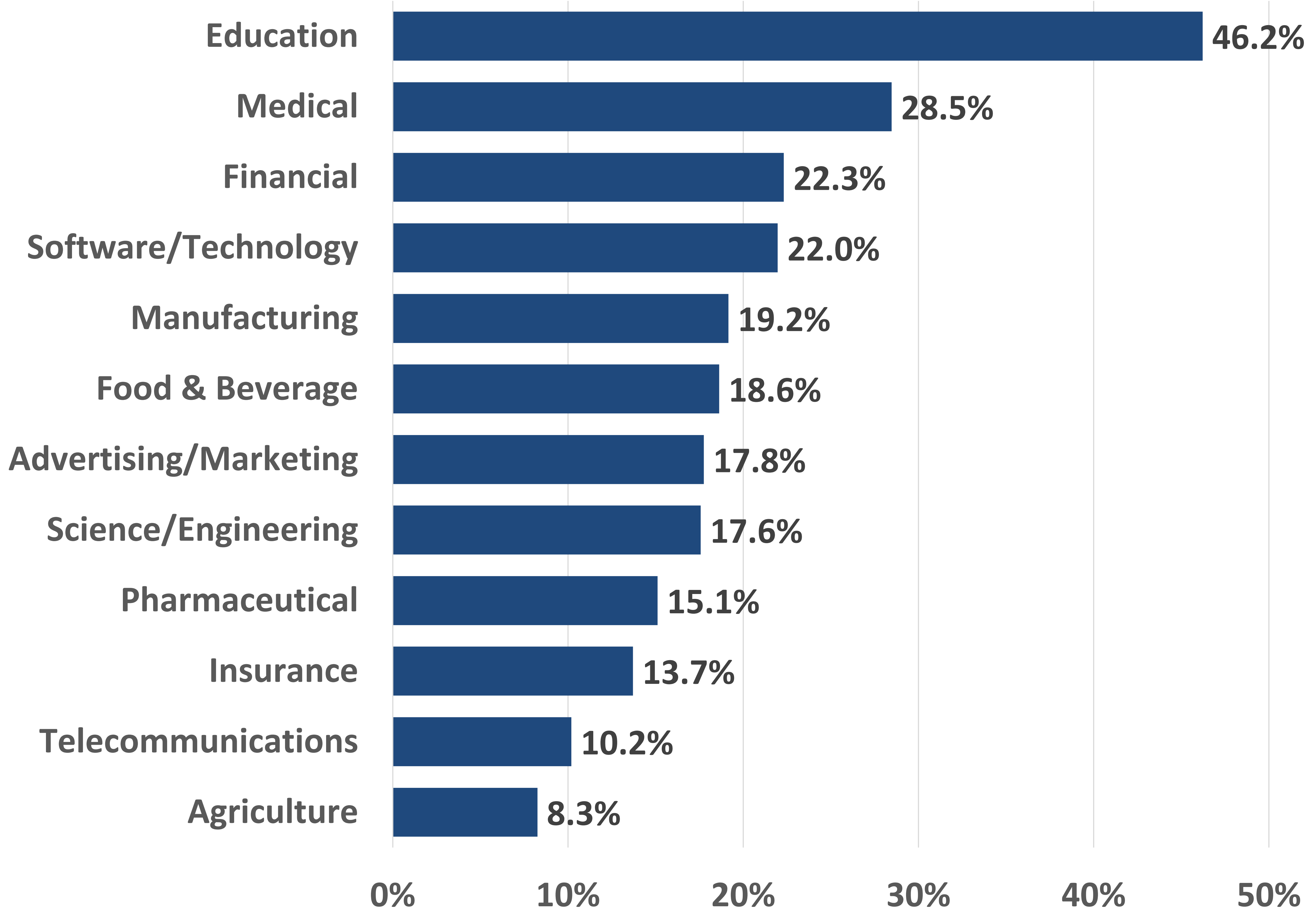


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Annual meetings	76.1%	80.8%	92.3%	76.9%	86.5%
Business meetings/board meetings	66.4%	72.8%	61.5%	68.7%	79.7%
Conventions w/ exhibits, general sessions and/or meetings	50.3%	60.3%	53.8%	51.8%	60.8%
Seminars or educational meetings	49.7%	50.3%	42.3%	47.7%	52.7%
Board/other organizational retreats	31.5%	51.0%	34.6%	37.0%	52.7%
Networking/corporate social events (i.e. mixers, or other social-business functions)	30.6%	37.7%	15.4%	33.4%	40.5%
Special events (i.e. festivals)	20.3%	31.8%	11.5%	24.9%	44.6%
Trade shows with exhibits	21.2%	26.5%	23.1%	21.2%	33.8%
Team-building	16.1%	27.2%	0.0%	21.0%	29.7%
Incentive trips	13.0%	39.1%	0.0%	21.5%	25.7%
Reunion events	4.2%	15.2%	0.0%	8.5%	12.2%
Product reveals	6.1%	15.2%	0.0%	10.1%	13.5%
Consumer shows	2.4%	10.6%	0.0%	4.4%	12.2%
School trips	1.8%	7.9%	0.0%	3.9%	5.4%
Other	6.7%	3.3%	3.8%	5.4%	5.4%

Which best describes the types of meetings/events you most typically plan? (Select all that apply) Base: 569 Completed Surveys

Industries of Experience

The experience of the meeting planners surveyed represents a diverse set of industries. The most common industries meeting planners have experience planning events for include education (46.2%), medical (28.5%), financial (22.3%) and software/technology (22.0%).

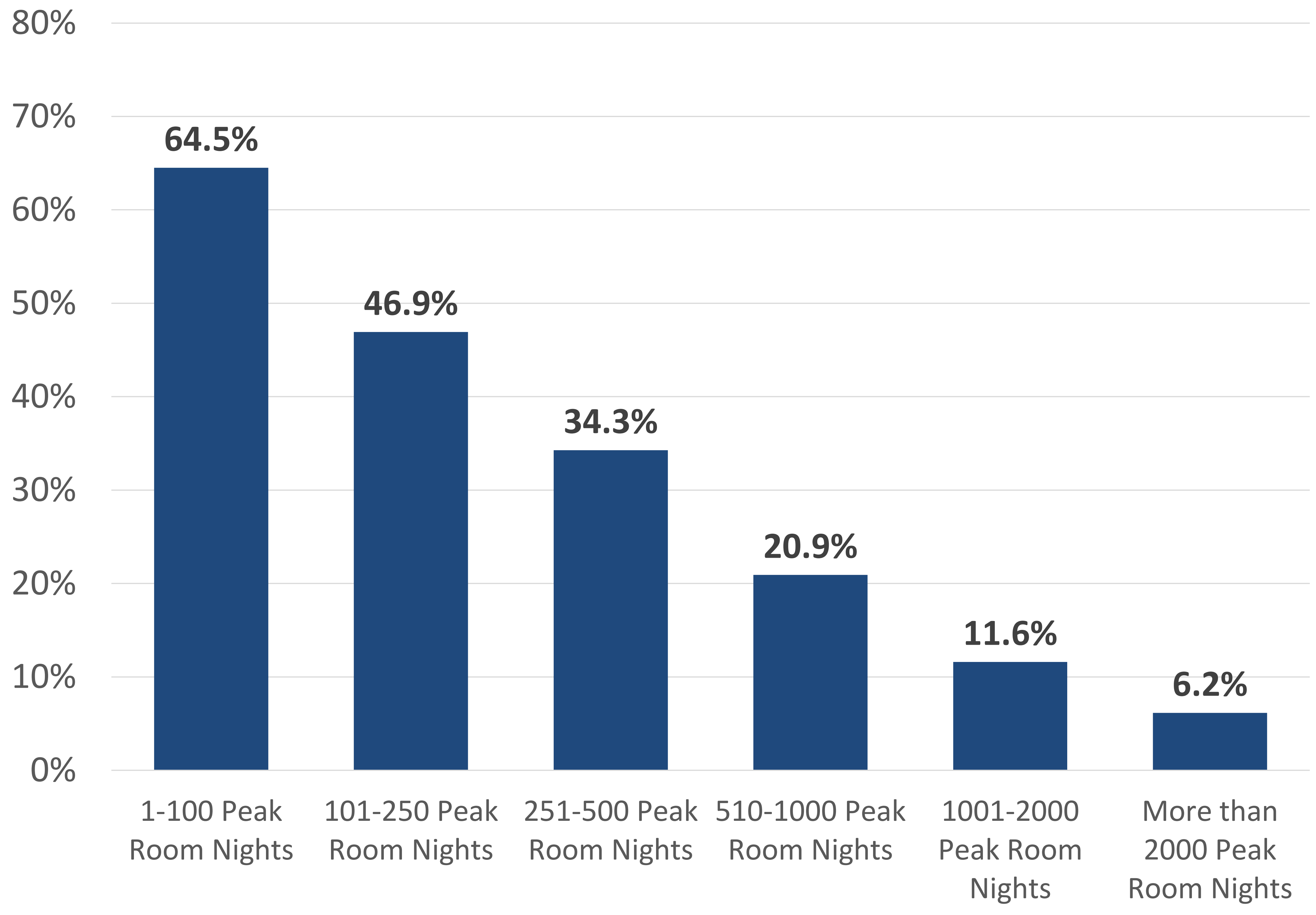


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Education	38.2%	67.5%	42.3%	46.4%	54.1%
Medical	23.3%	42.4%	46.2%	28.5%	47.3%
Financial	18.5%	36.4%	11.5%	24.4%	29.7%
Software/Technology	18.8%	36.4%	23.1%	25.1%	33.8%
Manufacturing	19.1%	26.5%	7.7%	21.8%	28.4%
Food & Beverage	13.0%	31.8%	11.5%	16.6%	33.8%
Advertising/Marketing	14.2%	25.2%	3.8%	17.4%	23.0%
Science/Engineering	15.5%	24.5%	26.9%	17.4%	20.3%
Pharmaceutical	11.2%	27.8%	11.5%	17.4%	23.0%
Insurance	9.1%	29.1%	3.8%	14.5%	20.3%
Telecommunications	8.2%	18.5%	3.8%	11.9%	16.2%
Agriculture	6.1%	12.6%	7.7%	7.5%	6.8%

Which of the following industries do you have experience planning meetings or events for? (Select all that apply)
Base: 569 Completed Surveys

Typical Meetings Sizes

The most typical meeting size is 100 or less peak room nights; the majority is under 250 on peak. Experience with planning larger meetings of 1000+ peak room nights is less common.

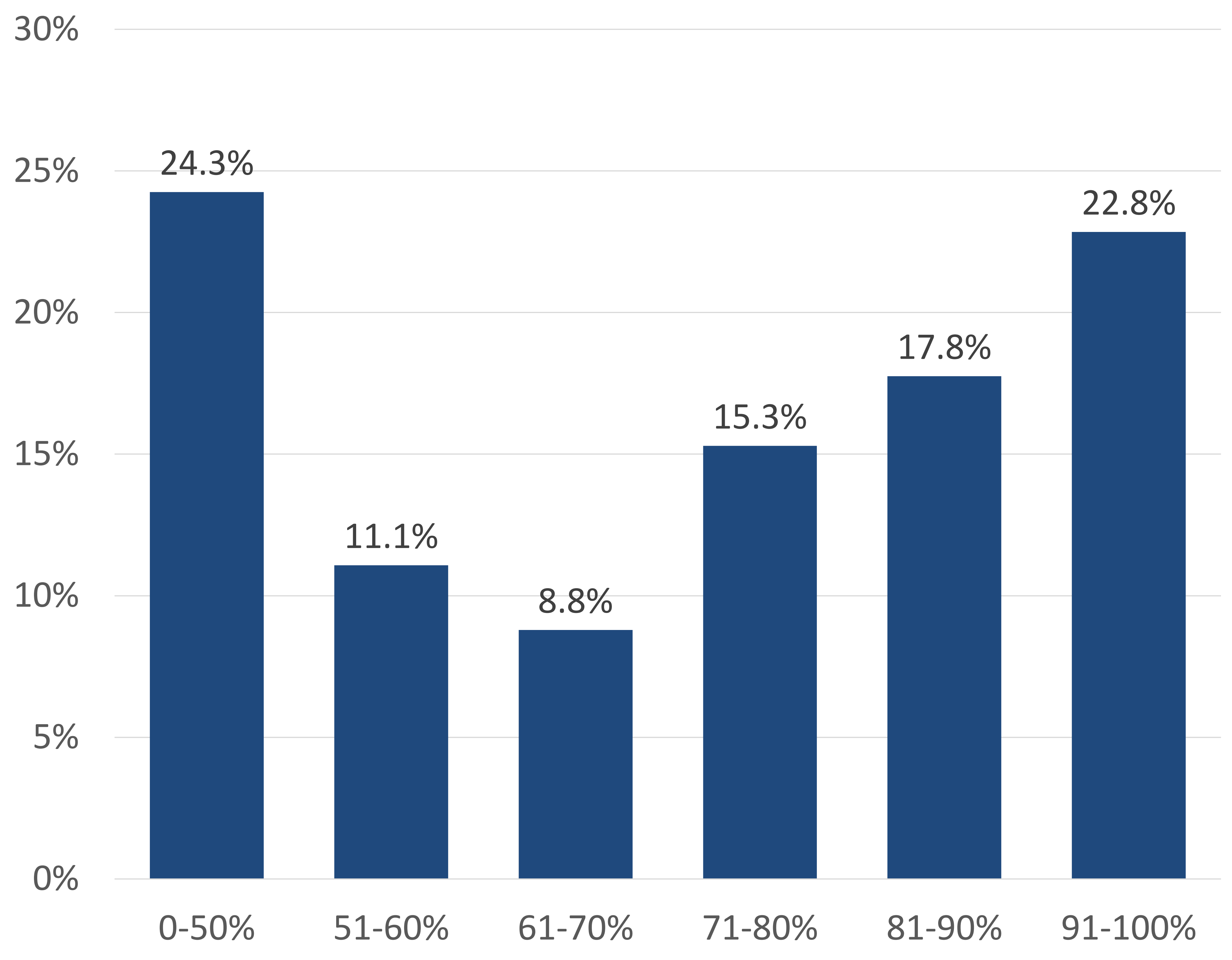


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY WIDE
1-100 Peak Room Nights	62.7%	69.5%	42.3%	68.1%	55.4%
101-250 Peak Room Nights	45.5%	59.6%	50.0%	48.2%	55.4%
251-500 Peak Room Nights	29.4%	49.7%	38.5%	35.0%	45.9%
510-1000 Peak Room Nights	20.6%	27.2%	15.4%	20.5%	32.4%
1001-2000 Peak Room Nights	13.6%	10.6%	7.7%	10.6%	27.0%
More than 2000 Peak Room Nights	5.8%	7.3%	0.0%	4.4%	16.2%

How large are the meetings you typically plan (in peak room nights?) Base: 569 Completed Surveys

Typical Reserved Room Block by Percent of Attendance

Over half of meeting planners typically reserve a room block for 70 percent or more of their total attendance (55.9%). In contrast, nearly a quarter (24.3%) reserve a room block for 50 percent or less of their meeting's total attendance.



	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
0-50%	23.6%	17.9%	19.2%	23.6%	14.9%
51-60%	10.0%	9.9%	26.9%	9.3%	20.3%
61-70%	9.1%	7.9%	7.7%	8.5%	17.6%
71-80%	18.5%	13.2%	15.4%	14.0%	13.5%
81-90%	16.4%	23.2%	19.2%	18.7%	12.2%
91-100%	22.4%	27.8%	11.5%	25.9%	21.6%

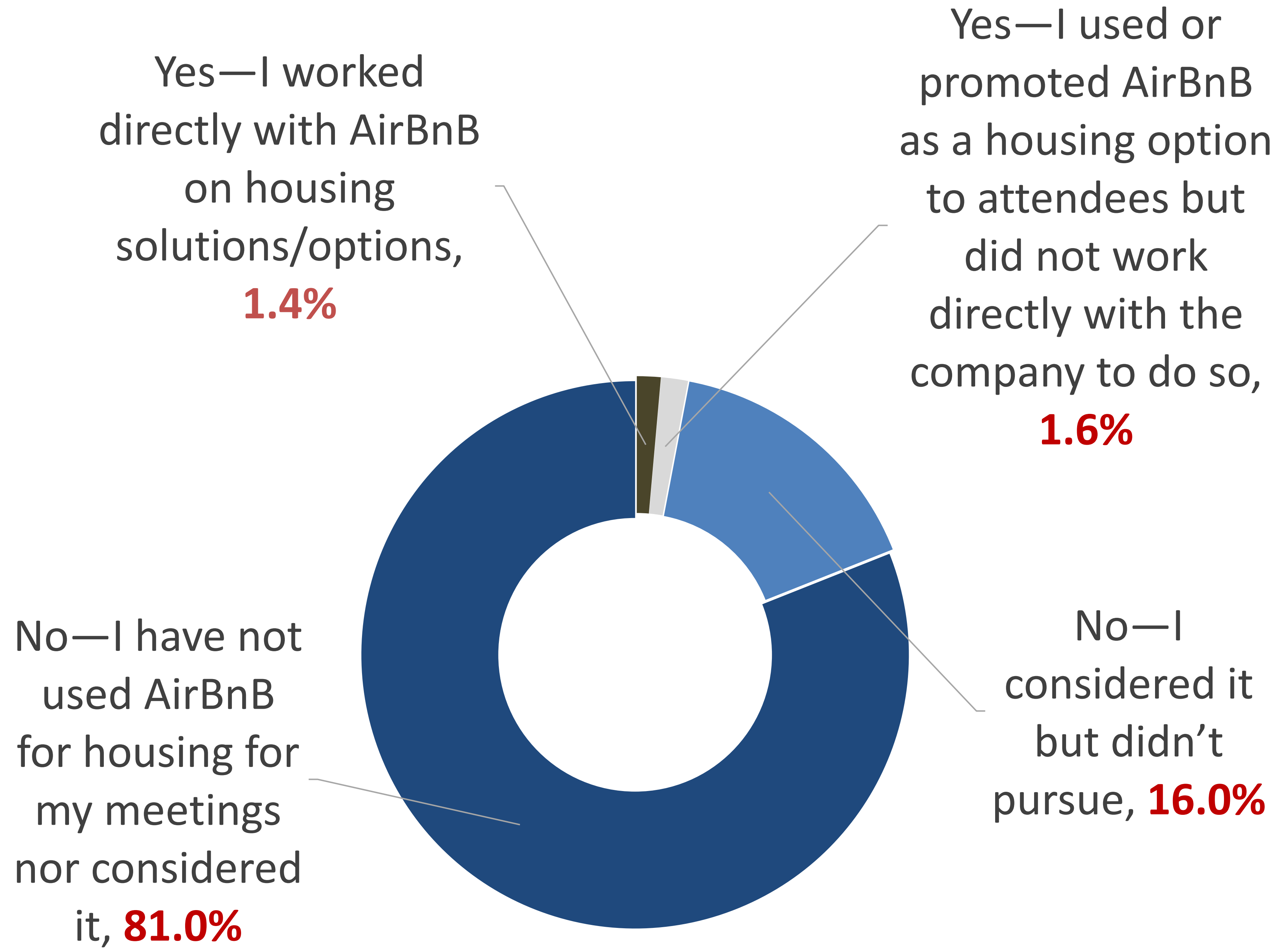
Please estimate what percentage of the total meeting/event attendance you typically reserve a room block for at the hotel(s). (Select one) Base: 569 Completed Surveys

The Shared Economy

This section of the report examines the current state of the shared economy in the meetings industry and its likely impact in the future

Use of Airbnb

At this point, Airbnb has not yet gained significant traction with meeting planners as a housing solution. Just 3.0 percent of planners surveyed have worked directly with Airbnb on housing solutions or promoted Airbnb as a housing option for their meeting. The majority of meeting planners have not used Airbnb for housing their meetings nor considered doing so (81.0%). Nevertheless, 16.0 percent did, in fact, entertain Airbnb as an option. nAssociation planners were the likeliest segment to promote Airbnb as a housing option to their attendees (3.8%) and the likeliest to have considered it as housing solution.

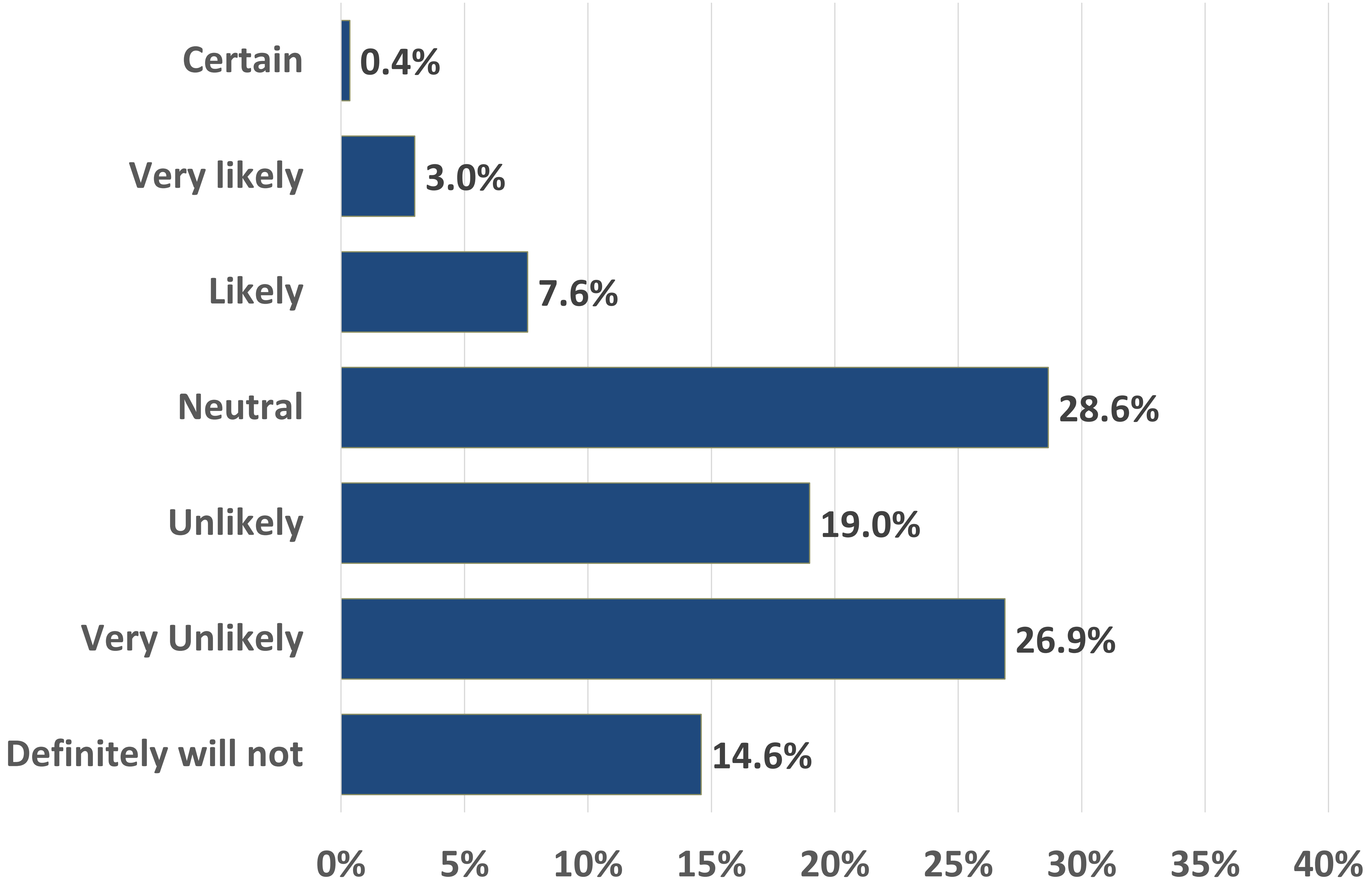


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Yes—I worked directly with Airbnb on housing solutions/options	1.8%	0.7%	0.0%	1.6%	0.0%
Yes—I used or promoted Airbnb as a housing option to attendees but did not work directly with the company to do so	0.9%	2.0%	3.8%	1.6%	2.7%
No—I considered it but didn't pursue	15.2%	19.2%	26.9%	15.8%	28.4%
No—I have not used Airbnb for housing for my meetings nor considered it	82.1%	78.1%	69.2%	81.1%	68.9%

Have you used and/or worked with Airbnb to fill your housing needs for any meetings or events?
Base: 569 Completed Surveys

Likelihood of Using Airbnb as a Housing Solution (Next 2 Years)

Although only 3.0 percent have used or promoted Airbnb as a housing solution previously, one-in-ten meeting planners (11.0%) said they were "likely," "very likely" or "certain" to use Airbnb for meeting housing within the next two years. Meeting planners who organize citywide conventions are the likeliest to promote/use Airbnb for their meetings in the next two years at 23.1 percent. A notable proportion of association planners (15.3%) and third party planners (13.9%) have expressed some likelihood of working with Airbnb in the future, while corporate planners are the least likely to do the same (9.7%).

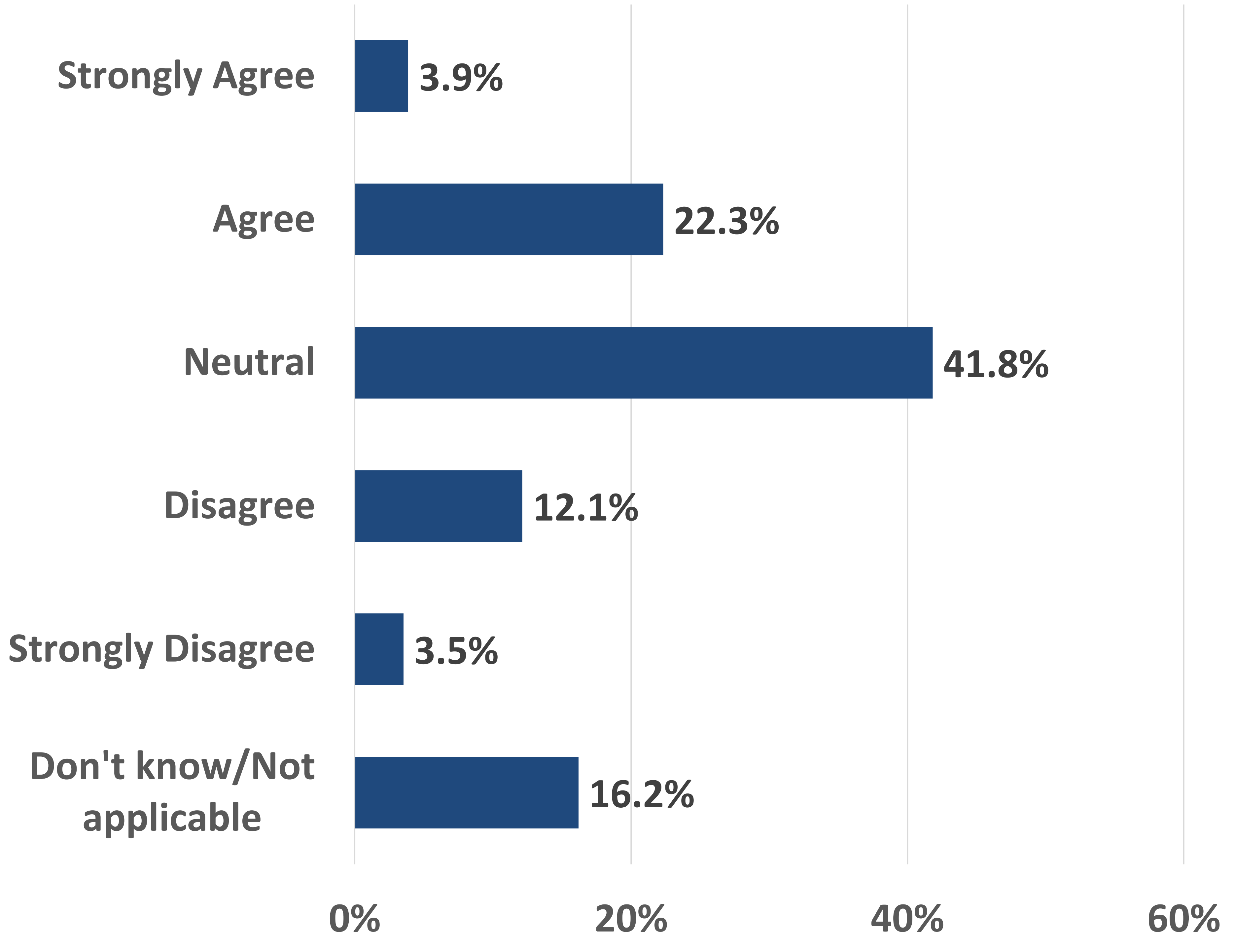


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Certain	0.6%	0.0%	0.0%	0.5%	1.4%
Very likely	3.0%	1.3%	11.5%	3.1%	6.8%
Likely	6.1%	12.6%	3.8%	8.8%	14.9%
Neutral—neither likely nor unlikely	28.8%	26.5%	34.6%	28.2%	21.6%
Unlikely	17.9%	23.2%	15.4%	17.1%	24.3%
Very Unlikely	27.0%	27.8%	23.1%	26.9%	23.0%
Definitely will not	16.7%	8.6%	11.5%	15.3%	8.1%

How likely are you to use or work with Airbnb for housing solutions for the meetings and events you plan in the next 2 years? Base: 569 Completed Surveys

DMO Partnership with Airbnb

Over one-quarter (26.2%) of meeting planners "agree" or "strongly agree" that CVBs/DMOs should have a partnership or strong relationship with Airbnb, demonstrating the home share economy's increasing significance to the meetings and destination marketing industries.



	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Strongly Agree	3.6%	4.0%	7.7%	4.4%	4.1%
Agree	22.4%	21.2%	19.2%	20.2%	23.0%
Neutral	43.0%	44.4%	42.3%	42.0%	47.3%
Disagree	11.2%	13.9%	15.4%	12.4%	10.8%
Strongly Disagree	2.7%	4.0%	0.0%	3.6%	6.8%
Don't know/ Not applicable	16.7%	12.6%	15.4%	17.1%	6.8%

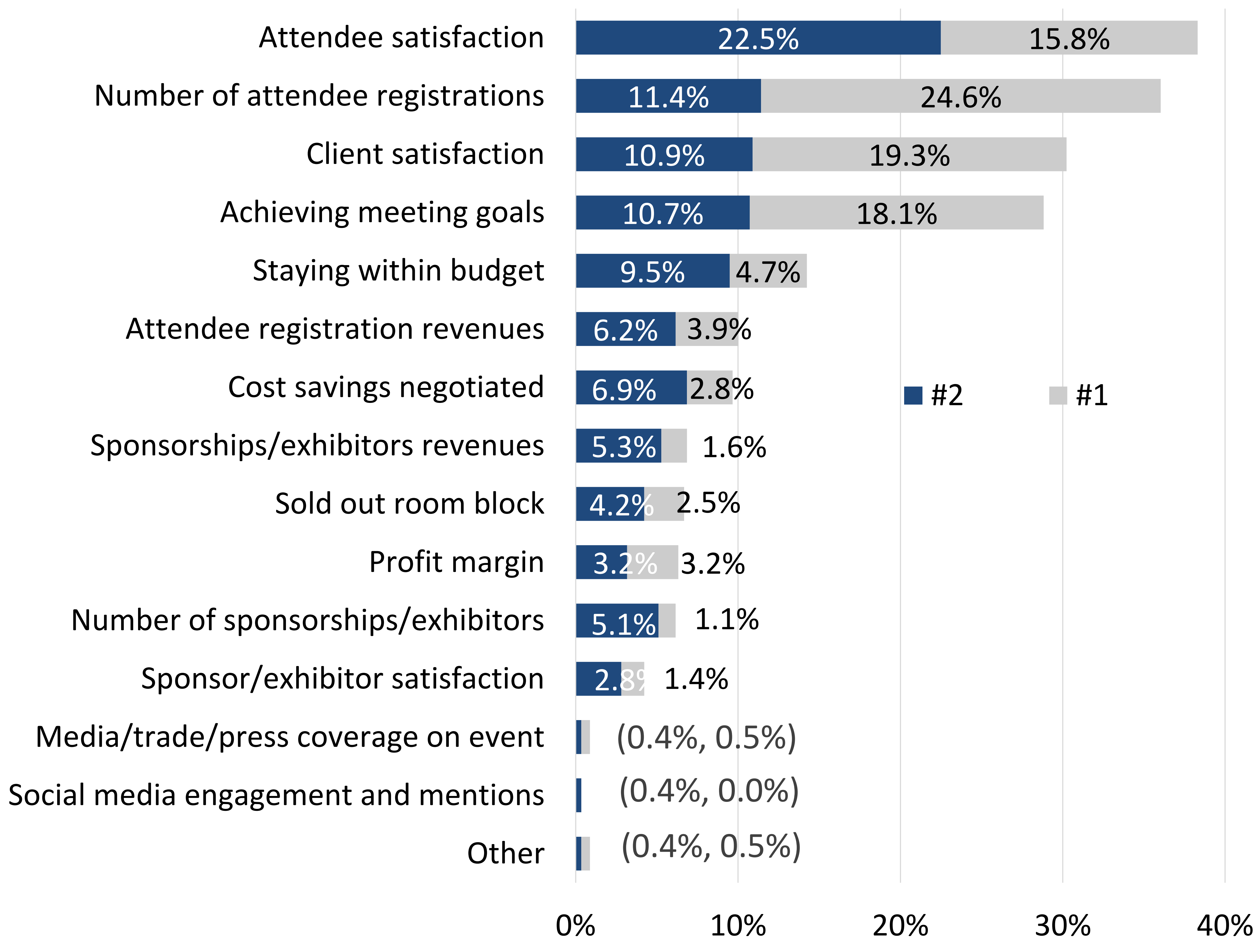
Please state your general level of agreement for the following statement: CVBs/DMOs should have a partnership or strong relationship with Airbnb. Base: 569 Completed Surveys

Measuring Success

This section of the report examines the metrics meeting planners use to evaluate their success, and relatedly, how destination decisions are made

Meeting Success Metrics—Overall

Attendee satisfaction (38.3%), followed by number of registrants (36.0%), are generally considered the most important factors in measuring the success of a meeting. Factors related to cost–including staying within budget and cost savings negotiated–are also important in how meeting planners measure their success.



TOP TWO BOX SCORE	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Attendee satisfaction	41.5%	29.1%	38.5%	38.6%	33.8%
Number of attendee registrations	38.5%	24.5%	38.5%	31.9%	31.1%
Client satisfaction	21.5%	54.3%	34.6%	33.4%	27.0%
Achieving meeting goals	33.9%	23.2%	23.1%	30.6%	23.0%
Staying within budget	14.8%	13.9%	7.7%	15.8%	16.2%
Attendee registration revenues	11.8%	6.0%	7.7%	9.6%	16.2%
Cost savings negotiated	8.8%	14.6%	0.0%	10.4%	9.5%
Sponsorships/exhibitors revenues	7.0%	6.0%	7.7%	7.0%	12.2%
Sold out room block	5.8%	9.3%	3.8%	5.2%	9.5%
Profit margin	4.8%	6.0%	19.2%	5.7%	8.1%
Number of sponsorships/exhibitors	6.1%	5.3%	11.5%	4.9%	4.1%
Sponsor/exhibitor satisfaction	3.0%	6.0%	3.8%	4.4%	4.1%
Media/trade/press coverage on event	1.2%	0.7%	0.0%	1.0%	2.7%
Social media engagement and mentions	0.3%	0.7%	0.0%	0.5%	1.4%
Other	0.9%	0.7%	0.0%	1.0%	1.4%

Please think about how you most typically evaluate the success of the meetings or events you plan. Which of the following do you generally consider MOST IMPORTANT in measuring the success of a meeting or event? Please rank your top five. Base: 569 Completed Surveys

Meeting Success Metrics: Top 5 By Planner Type

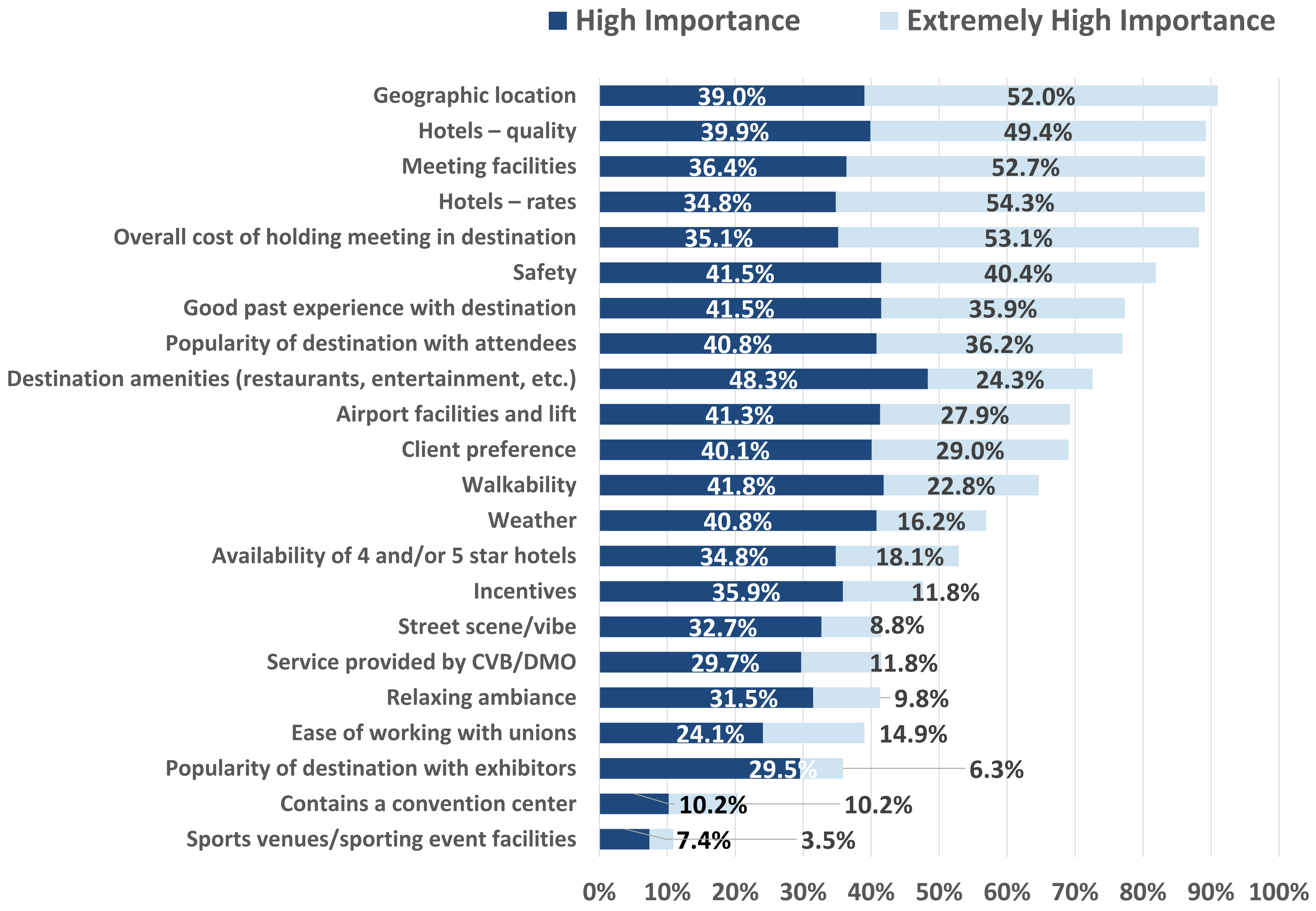
Across planner types, attendee satisfaction is one of the top success metrics. Destinations and DMOs that can assist the planner in achieving strong attendee satisfaction will thus be highly valued. In terms of other top success metrics, for third-party planners, client satisfaction is obviously paramount (54.3%). Corporate planners look to whether meeting goals were achieved (40.0%), while association planners and SMERF planners strongly judge success by the number of attendee registrations.

	Corporate Planners	Third-Party Planners	Association Planners	SMERF Planners
1	Attendee satisfaction (40.8%)	Client satisfaction (54.3%)	Attendee registrations (#) (50.3%)	Attendee satisfaction (43.0%)
2	Achieving meeting goals (40.0%)	Attendee satisfaction (29.1%)	Attendee satisfaction (41.5%)	Attendee registrations (#) (40.5%)
3	Client satisfaction (36.0%)	Attendee registrations (#) (24.5%)	Achieving meeting goals (25.9%)	Achieving meeting goals (30.4%)
4	Attendee registrations (#) (25.6%)	Achieving meeting goals (23.2%)	Client satisfaction (13.6%)	Client satisfaction (29.1%)
5	Staying within budget (19.2%)	Cost savings negotiated (14.6%)	Attendee registrations ($) (12.2%)	Staying within budget (12.7%)

Please think about how you most typically evaluate the success of the meetings or events you plan. Which of the following do you generally consider MOST IMPORTANT in measuring the success of a meeting or event? RANK THE TOP FIVE? Base: 569 Completed Surveys

Importance of Destination Attributes—Overall

The way planners measure success, namely by attendee satisfaction and cost, can be seen in the attributes they highly value in a meetings destination: geographic location, hotel quality, meeting facilities, safety, popularity and amenities, as well as hotel rates and the overall cost of holding a meeting in the destination. A destination's assets in these areas should be particularly communicated when positioning the destination to meeting planners.



TOP 2 BOX SCORE	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Geographic location	90.0%	93.4%	84.6%	92.7%	83.8%
Hotels – quality	88.2%	93.4%	88.5%	89.6%	83.8%
Hotels – rates	87.6%	92.1%	88.5%	88.6%	81.1%
Meeting facilities	88.2%	90.1%	92.3%	88.6%	89.2%
Overall cost of meeting in destination	86.7%	89.4%	92.3%	88.3%	83.8%
Safety	80.0%	86.1%	76.9%	81.1%	82.4%
Good past experience with destination	78.2%	76.8%	84.6%	78.5%	77.0%
Popularity of destination with attendees	72.4%	83.4%	88.5%	77.5%	75.7%
Destination amenities	68.5%	81.5%	69.2%	72.5%	77.0%
Airport facilities and lift	68.5%	74.2%	84.6%	69.9%	67.6%
Client preference	58.5%	92.1%	80.8%	70.5%	71.6%
Walkability	60.0%	72.2%	73.1%	61.7%	66.2%
Weather	53.3%	64.9%	65.4%	55.4%	56.8%
Availability of 4 and/or 5 star hotels	49.7%	62.3%	50.0%	54.1%	52.7%
Incentives	43.0%	60.3%	50.0%	46.6%	55.4%
Street scene/vibe	36.7%	46.4%	61.5%	38.1%	47.3%
Service provided by CVB/DMO	35.2%	45.7%	65.4%	37.6%	51.4%
Relaxing ambiance	37.9%	43.7%	57.7%	40.7%	43.2%
Ease of working with unions	37.0%	44.4%	65.4%	38.3%	50.0%
Popularity of destination with exhibitors	30.9%	42.4%	42.3%	34.2%	41.9%
Contains a convention center	22.7%	17.2%	15.4%	16.3%	44.6%
Sports venues/sporting event facilities	8.5%	17.2%	0.0%	10.9%	17.6%

In general, how important are each of the following in determining the destination in which you hold your meetings? Base: 569 Completed Surveys

Importance of Destination Attributes: Top 5 by Planner Type

Across planner types, geographic location is the strongest consideration in destination selection. Association planners are slightly more concerned with cost compared to corporate planners.

Corporate Planners

1. Geographic location (94.4%)
2. Hotels – quality (92.8%)
3. Meetings facilities (90.4%)
4. Hotels – rates (87.2%)
5. Overall cost (87.2%)

Association Planners

1. Geographic location (92.5%)
2. Hotels – rates (92.5%)
3. Meetings facilities (92.5%)
4. Hotels – quality (91.2%)
5. Overall cost (90.5%)

SMERF Planners

1. Geographic location (91.1%)
2. Meetings facilities (86.1%)
3. Overall cost (86.1%)
4. Hotels – quality (84.8%)
5. Hotels – rates (84.8%)

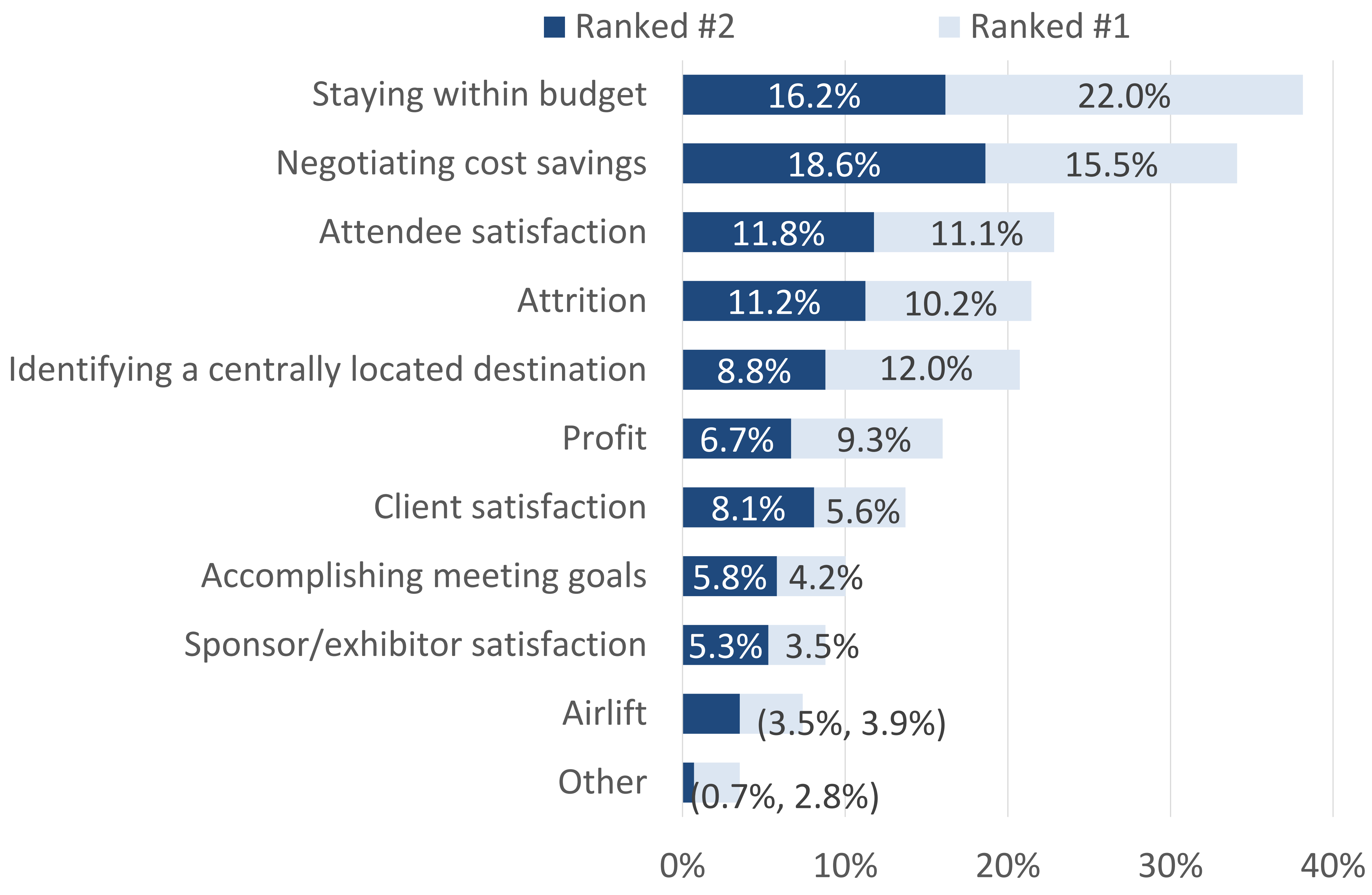
In general, how important are each of the following in determining the destination in which you hold your meetings? Base: 569 Completed Surveys

Challenges

This section of the report examines meeting planners' current challenges in executing a successful meeting

Top Meeting Planner Challenges

Despite being a slightly lower measure of success compared to attendee satisfaction, issues related to cost are largely the key challenges meeting planners face in executing a successful meeting. Across all planner types, staying within budget (38.2%) and negotiating cost savings (34.1%) are the top challenges across all planner types. Again, DMOs that can assist or otherwise provide relief in this area are likely to be highly valued.

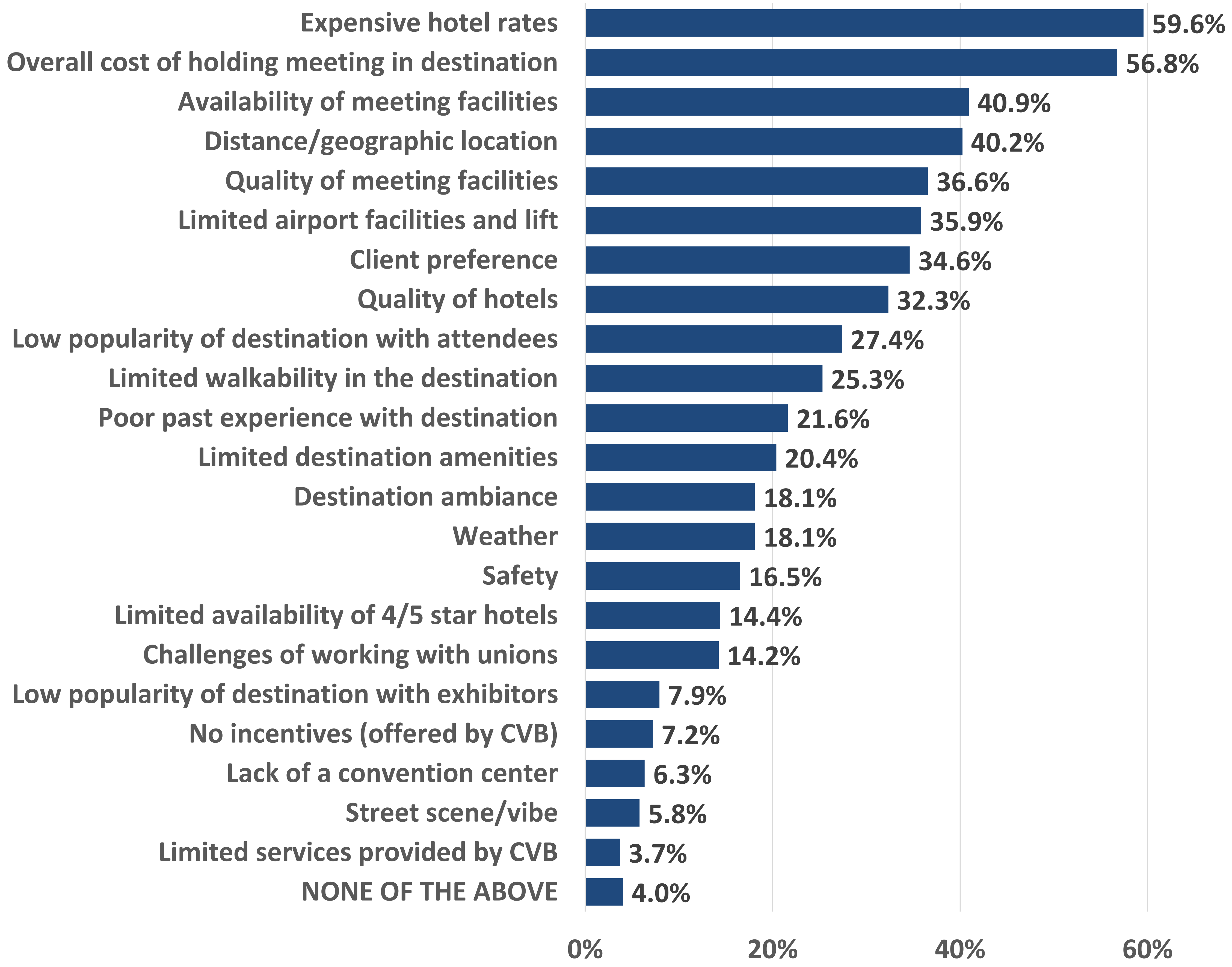


TOP 2 BOX SCORE	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Staying within budget	41.2%	33.8%	30.8%	38.3%	25.7%
Negotiating cost savings	32.1%	32.5%	42.3%	34.5%	33.8%
Attendee satisfaction	28.5%	8.6%	26.9%	21.0%	18.9%
Attrition	19.7%	27.8%	23.1%	23.3%	21.6%
Identifying a centrally located destination	20.9%	18.5%	26.9%	22.5%	16.2%
Profit	17.0%	14.6%	19.2%	15.3%	24.3%
Client satisfaction	9.7%	25.2%	3.8%	15.5%	17.6%
Accomplishing meeting goals	9.7%	14.6%	0.0%	8.8%	13.5%
Sponsor/exhibitor satisfaction	9.1%	7.3%	19.2%	8.3%	10.8%
Airlift	5.2%	13.2%	3.8%	7.8%	12.2%
Other	4.2%	2.0%	0.0%	3.4%	2.7%

Now please think about the top challenges you commonly face in planning and executing a successful meeting.
Please rank your top five challenges. Base: 569 Completed Surveys

Reasons for Passing on a Considered Destination—Overall

With the financial related most frequently posing challenges to meeting planners, cost factors were the primary reasons planners did not host meetings in destinations they had strongly considered. Expensive hotel rates (59.6%) and the overall cost of meeting in a destination (56.8%) were the most commonly cited reasons for passing on a considered destination.



	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Expensive hotel rates	57.0%	65.6%	57.7%	59.8%	62.2%
Overall cost of holding meeting in destination	53.6%	60.3%	65.4%	55.7%	58.1%
Availability of meeting facilities	43.9%	36.4%	34.6%	41.7%	41.9%
Distance/geographic location	40.6%	39.7%	38.5%	42.5%	36.5%
Quality of meeting facilities	37.6%	34.4%	30.8%	36.5%	47.3%
Limited airport facilities and lift	32.4%	42.4%	34.6%	37.6%	29.7%
Client preference	25.8%	57.0%	42.3%	36.3%	33.8%
Quality of hotels	34.5%	34.4%	15.4%	33.7%	39.2%
Low popularity of destination with attendees	28.2%	24.5%	26.9%	28.5%	23.0%
Limited walkability in the destination	20.6%	30.5%	19.2%	26.4%	20.3%
Poor past experience with destination	21.5%	21.2%	23.1%	23.3%	32.4%
Limited destination amenities	22.1%	17.9%	11.5%	20.7%	24.3%
Weather	20.0%	18.5%	11.5%	20.2%	17.6%
Destination ambiance	18.2%	20.5%	7.7%	19.7%	14.9%
Safety	15.5%	17.9%	19.2%	18.4%	16.2%
Limited availability of 4 and/or 5 star hotels	16.7%	12.6%	7.7%	16.8%	13.5%
Challenges of working with unions	11.2%	22.5%	7.7%	12.4%	23.0%
Low popularity of destination with exhibitors	6.4%	11.3%	15.4%	8.5%	4.1%
The destination's CVB did not offer incentives	5.8%	9.9%	7.7%	6.0%	14.9%
Lack of a convention center	6.4%	6.0%	3.8%	4.1%	13.5%
Street scene/vibe	6.1%	6.0%	3.8%	6.7%	6.8%
Limited services provided by CVB	3.3%	3.3%	3.8%	3.1%	4.1%
NONE OF THE ABOVE	4.8%	2.0%	3.8%	3.6%	4.1%

Please think about the destinations you seriously considered but did not select for meetings that you planned in the past 2 years.
Which of the following were reasons that a destination you considered was not selected for a meeting? Base: 569 Completed Surveys

Top 5 Reasons for Passing on a Considered Destination (by Planner)

While all planners are most deterred from choosing a destination by hotel rates and overall destination costs (while also grappling with distance/geographic location),differences between planners in how they are affected by other attributes provide further insight into what these various planner types value. Both corporate and third-party planners cited limited air lift as a top deterrent. For corporate planners, the quality of a destination's hotels made them pass, while third-party planners were impacted by their clients' preferences. Availability and quality of meetings facilities in a destination were common reasons association and SMERF planners did not choose destinations they had seriously considered for their events.

Rank	Corporate Planners	Third-Party Planners	Association Planners	SMERF Planners
1	Expensive hotel rates (50.4%)	Expensive hotel rates (65.6%)	Expensive hotel rates (65.3%)	Overall cost in destination (57.0%)
2	Overall cost in destination (48.8%)	Overall cost in destination (60.3%)	Overall cost in destination (61.9%)	Expensive hotel rates (51.9%)
3	Distance / geographic location (43.2%)	Client preference (57.0%)	Availability of meetings facilities (48.3%)	Availability of meetings facilities (40.5%)
4	Quality of hotels (40.0%)	Limited airport facilities and lift (42.4%)	Quality of meetings facilities (39.5%)	Distance / geographic location (39.2%)
5	Limited airport facilities & lift (37.6%)	Distance / geographic location (39.7%)	Distance / geographic location (37.4%)	Quality of meetings facilities (39.2%)

Please think about the destinations you seriously considered but did not select for meetings that you planned in the past 2 years. Which of the following were reasons that a destination you considered was not selected for a meeting? Base: 569 Completed Surveys

Looking Ahead

This section of the report examines how meeting planners' feel about the future of the meetings industry and the potential changes ahead—both positive and negative

Expected Changes in Meetings Industry (Next 3 Years)

The chart below shows the top three elements that meeting planners expect to improve in the next three years (left) and the top three which they feel will worsen (right). **Meeting planners expect the development of convention centers, attendance figures at meetings and airlift to be elements that improve in the next few years, while anticipating client budgets, the impact of hotel brand consolidations and their ability to negotiate with hotels to worsen.**

Thinking about the future of the meetings industry, in the next 3 years, how do you expect the following factors related to the meetings industry to change (if at all)? Base: 569 Completed Surveys

Expected Changes in Meetings Industry (continued)

The tables below summarize the results of all factors tested in the survey, with the percent of meeting planners feeling these will improve shown on the left and the percent of meeting planners who feel these will worsen shown on the right. **Association planners are most optimistic about the development of convention centers and increased air lift, while feeling they will be most negatively impacted by hotel mergers and budget. They are also relatively split as to whether attendance at meetings will increase or decrease. Corporate planners are optimistic about attendance and convention centers, yet most concerned that their ability to negotiate with hotels will worsen.**

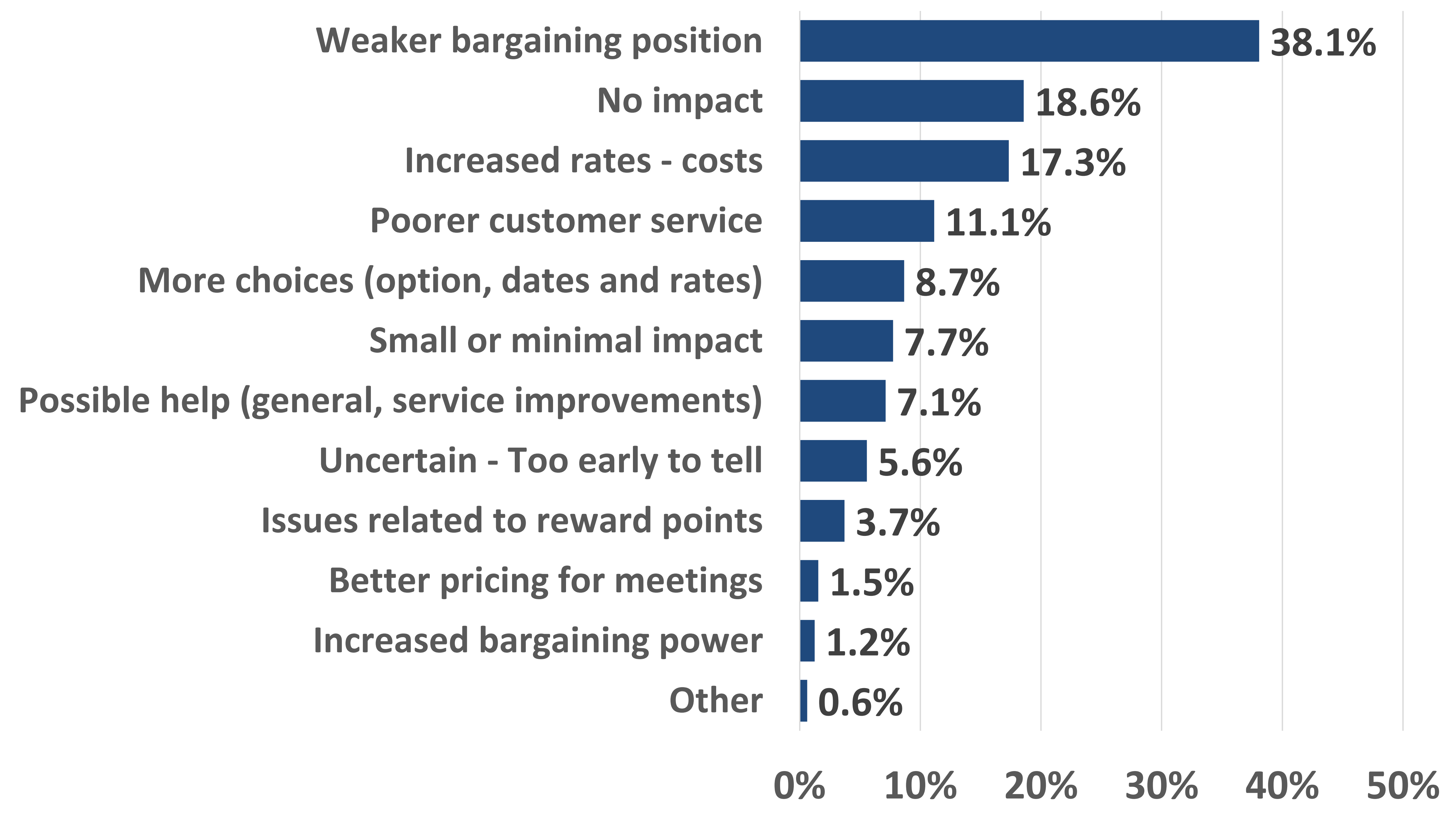
Expected to improve "a lot" or "somewhat"	Total Answering	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY-WIDE
Development of convention centers	39.7%	38.8%	43.7%	50.0%	37.3%	51.4%
Attendance figures at meetings	32.0%	31.2%	37.1%	34.6%	32.4%	35.1%
Airlift/air service/ availability of direct flights	28.6%	27.6%	29.8%	46.2%	26.7%	27.0%
Meeting planners' ability to negotiate with hotels	24.3%	20.9%	31.1%	19.2%	23.3%	17.6%
The impact of the shared economy/ Airbnb on lodging inventory for meetings	22.5%	24.5%	19.2%	15.4%	22.8%	17.6%
Attendee pickup of the room block	19.9%	17.9%	27.2%	15.4%	19.7%	18.9%
The impact of hotel brand consolidation/mergers	19.5%	22.4%	15.9%	19.2%	19.2%	21.6%
Client/meetings budget	17.9%	15.5%	22.5%	23.1%	17.6%	16.2%

Expected to get "somewhat" or "much" worse	Total Answering	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY-WIDE
Meeting planners' ability to negotiate with hotels	40.2%	42.7%	35.1%	38.5%	39.6%	37.8%
The impact of hotel brand consolidation/mergers	39.4%	35.8%	44.4%	46.2%	39.4%	35.1%
Client/meetings budget	34.6%	34.5%	29.1%	42.3%	33.9%	29.7%
The impact of the shared economy/ Airbnb on lodging inventory for meetings	28.8%	25.2%	35.1%	34.6%	27.5%	28.4%
Airlift/air service/availability of direct flights	28.1%	25.5%	30.5%	26.9%	30.6%	25.7%
Attendee pickup of the room block	24.6%	24.2%	19.2%	38.5%	21.5%	21.6%
Attendance figures at meetings	23.6%	21.5%	20.5%	30.8%	23.3%	12.2%
Development of convention centers	8.4%	7.3%	7.9%	7.7%	8.0%	8.1%

Thinking about the future of the meetings industry, in the next 3 years, how do you expect the following factors related to the meetings industry to change (if at all)? Base: 569 Completed Surveys

Expected Impact of Mergers & Acquisitions (OPEN-ENDED QUESTION)

When asked how they anticipate to be impacted by recent and potential hotel mergers/acquisitions, nearly 40 percent of meeting planners expect their bargaining positions to weaken (38.1%). Other common concerns cited included increased rates and costs (17.3%) and poorer customer service (11.1%). Just under one in five planners do not anticipate an impact to their meetings business, while some see these mergers in a positive light, with "more choices" (8.7%) and "possible help (service improvements)" (7.1%).



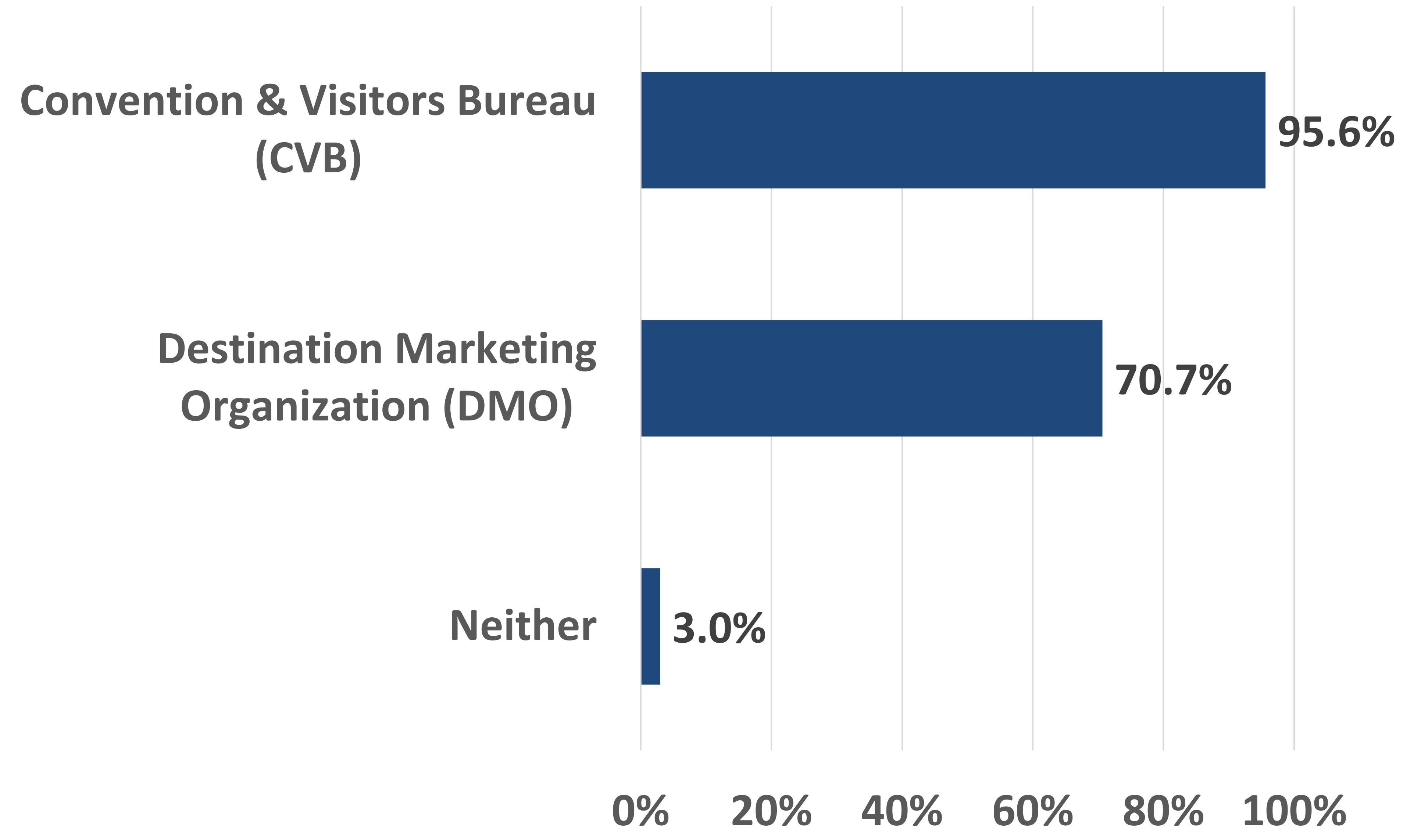
	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Weaker bargaining position	33.5%	46.7%	35.7%	38.1%	40.0%
No impact	19.5%	15.6%	7.1%	16.0%	12.5%
Increased rates - costs	16.2%	20.0%	7.1%	18.2%	22.5%
Poorer customer service	10.3%	15.6%	21.4%	13.0%	12.5%
More choices (dates, rates)	10.3%	5.6%	14.3%	9.5%	5.0%
Small or minimum impact	8.6%	5.6%	7.1%	7.8%	7.5%
Possible help (general, service improvements)	8.6%	3.3%	7.1%	6.1%	12.5%
Uncertain - Too early to tell	5.4%	5.6%	7.1%	5.2%	10.0%
Issues related to reward points	4.3%	3.3%	7.1%	3.9%	2.5%
Better pricing for meetings	2.2%	0.0%	0.0%	1.7%	0.0%
Increased bargaining power	1.6%	1.1%	0.0%	1.3%	0.0%
Other	0.5%	1.1%	0.0%	0.9%	0.0%

How do you expect to be impacted by the recent and potential future mergers and acquisitions such as Marriott/Starwood, Fairmont/Sofitel, etc.? Please share your thoughts below. Base: 569 Completed Surveys

The Meeting Planner & the DMO

Awareness of DMOs/CVBs

Planners have a strong awareness of DMOs. While there is less awareness for the term Destination Marketing Organization (70.7%), nearly all respondents had heard of Convention & Visitors Bureaus/CVBs (95.6%). Only 3.0 percent of meeting planners had not heard of DMOs nor CVBs prior to taking the survey. Corporate planners and those who plan self-contained meetings were the most likely segments to be unaware of these organizations.

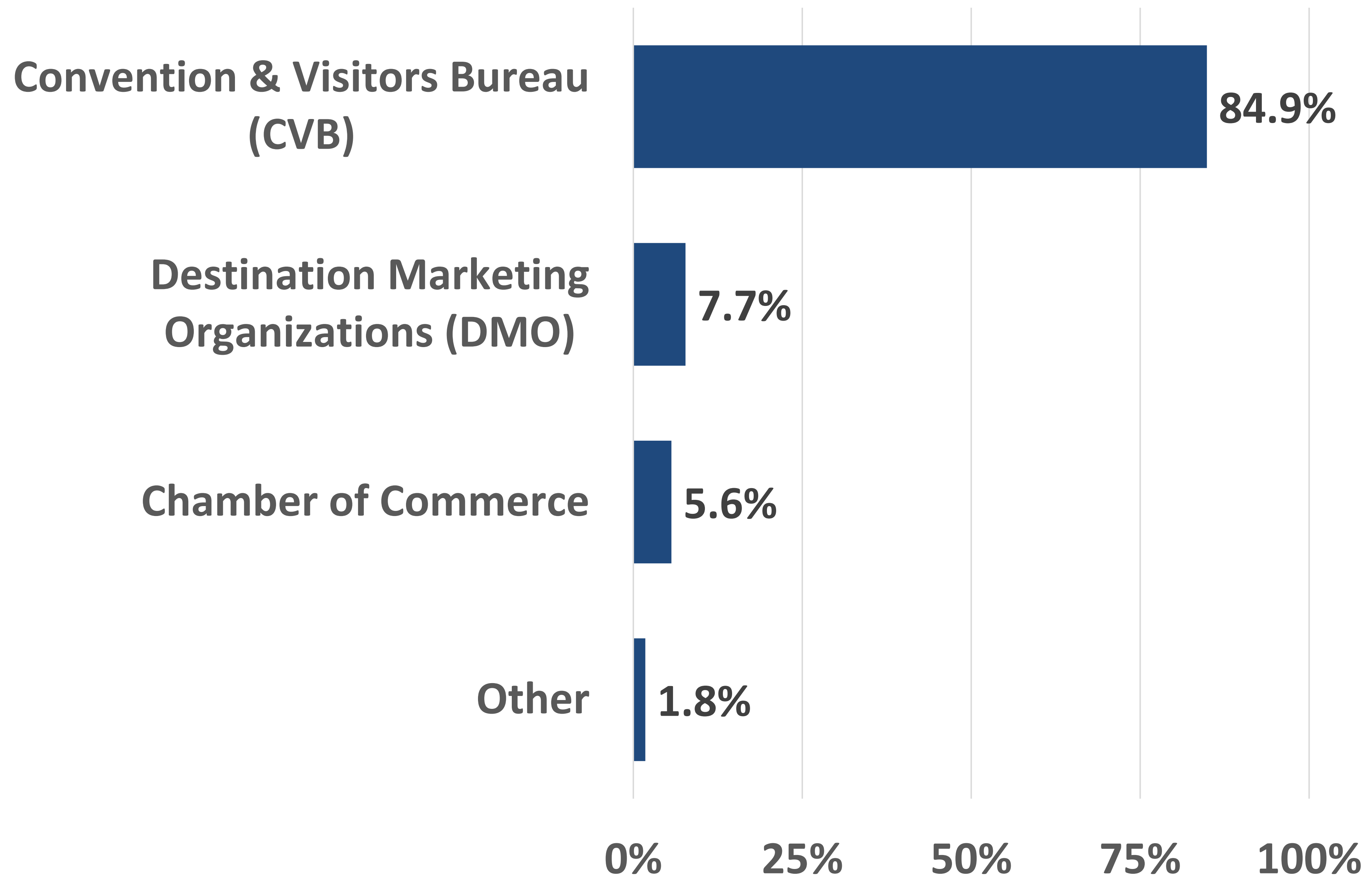


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Convention & Visitors Bureau (CVB)	95.2%	97.4%	96.2%	95.3%	91.9%
Destination Marketing Organization (DMO)	69.1%	80.1%	80.8%	67.4%	79.7%
Neither	3.3%	1.3%	0.0%	3.4%	2.7%

Prior to taking this survey, which of the following have you heard of? (Select all that apply)
Base: 569 Completed Surveys

What Meeting Planners Call DMOs

A vast majority of meeting planners said they typically refer to these organizations as a "Convention & Visitors Bureau" (84.9%). Fewer than one-in-ten refer to them as "Destination Marketing Organizations" (7.7%).

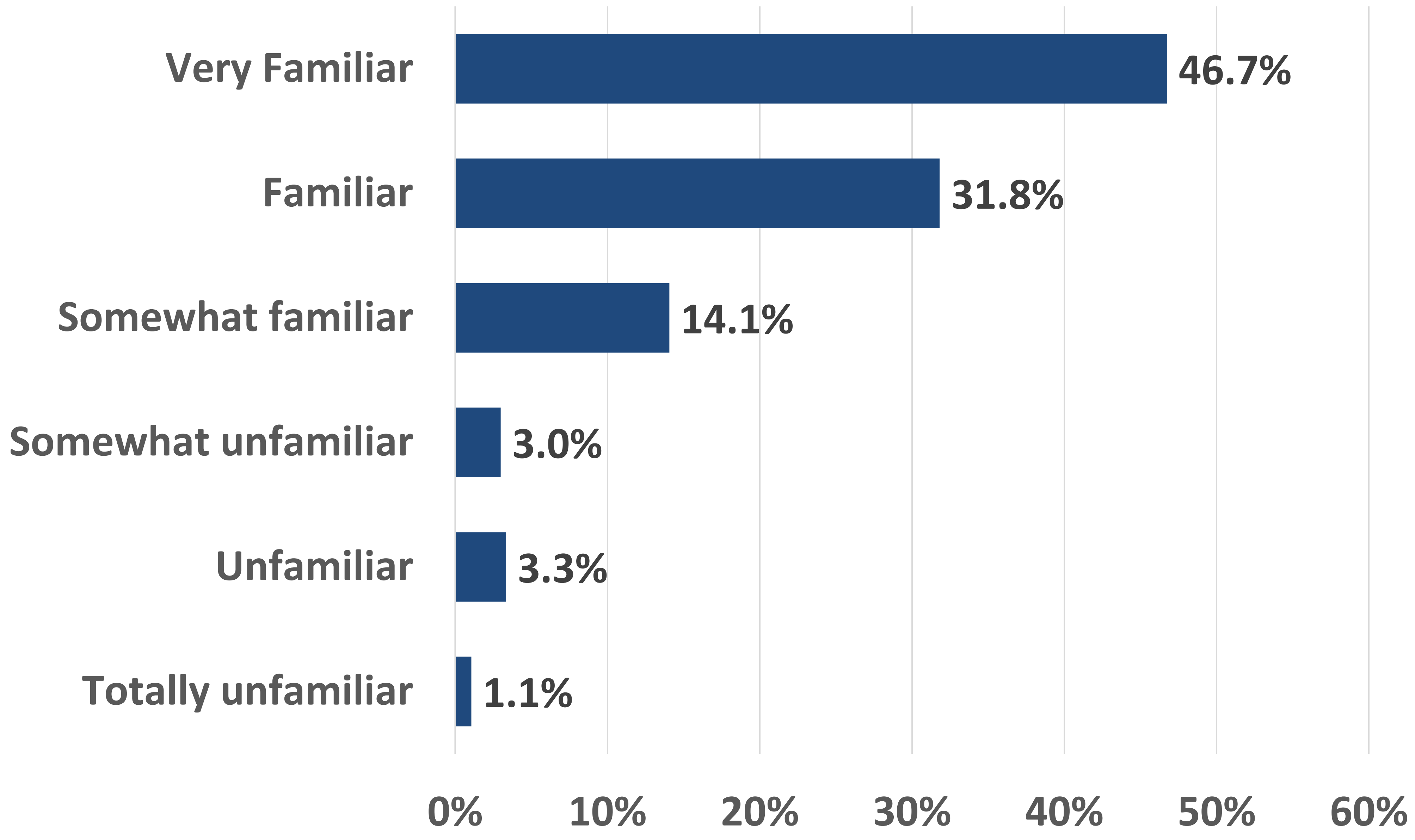


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Convention & Visitors Bureau (CVB)	85.5%	85.4%	84.6%	84.2%	83.8%
Destination Marketing Organizations (DMO)	5.5%	10.6%	15.4%	7.0%	6.8%
Chamber of Commerce	6.7%	2.6%	0.0%	6.5%	6.8%
Other	2.4%	1.3%	0.0%	2.3%	2.7%

How do you most typically refer to these organizations? (Select one) Base: 569 Completed Surveys

Familiarity with DMOs

A majority of meeting planners are familiar with CVBs/DMOs. More than three-quarters (78.5%) of meeting planners surveyed reported being “familiar” (31.8%) or “very familiar” (46.7%) with CVBs/DMOs. Less than 5 percent reported being “unfamiliar” (3.3%) or “totally unfamiliar” (1.1%). Association planners had the highest familiarity with DMOs overall, with 73.1 percent describing themselves as “very familiar” with these organizations. Corporate planners report the lowest levels of familiarity, with just 38.5 percent describing themselves as “very familiar” with DMOs.

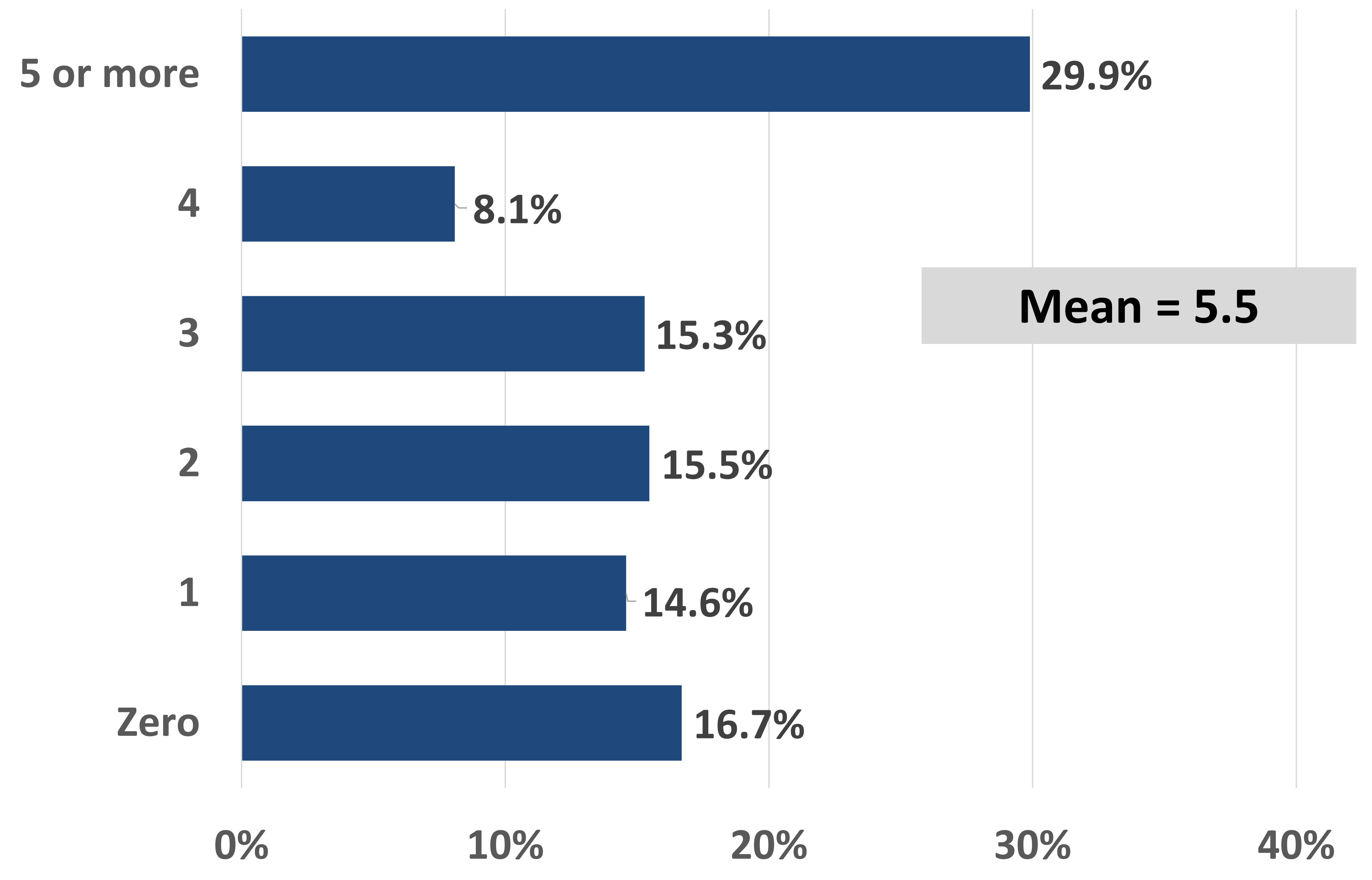


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Very Familiar	38.5%	57.6%	73.1%	46.1%	54.1%
Familiar	36.1%	29.1%	19.2%	29.3%	25.7%
Somewhat familiar	17.0%	8.6%	3.8%	16.1%	12.2%
Somewhat unfamiliar	2.7%	2.6%	3.8%	3.4%	5.4%
Unfamiliar	4.2%	1.3%	0.0%	4.1%	0.0%
Totally unfamiliar	1.5%	0.7%	0.0%	1.0%	2.7%

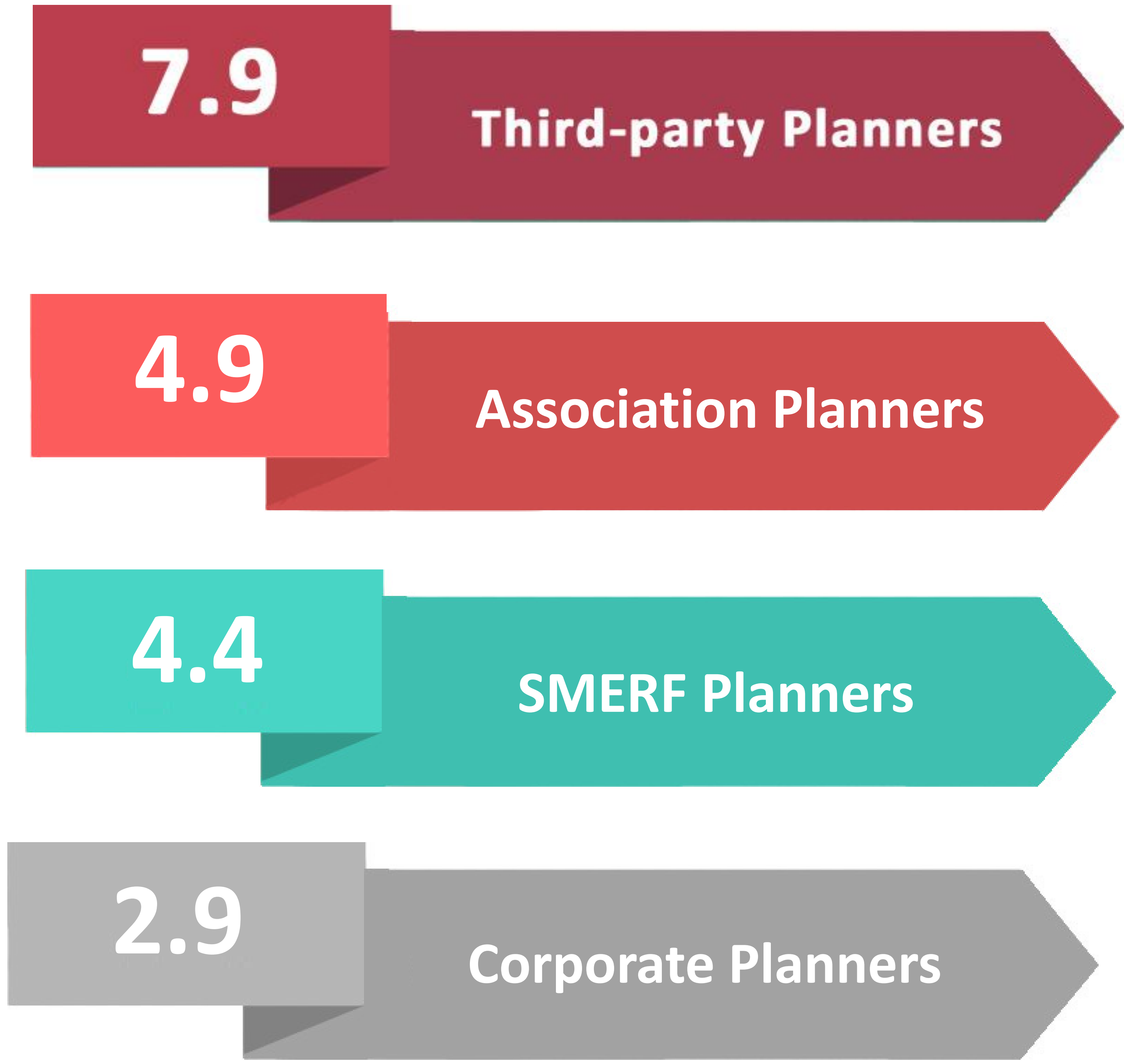
How familiar are you with Convention & Visitors Bureaus (CVBs) and Destination Marketing Organizations (DMOs)?
Base: 569 Completed Surveys

DMOs Used (Past 12 Months)

On average, meeting planners contacted 5.5 DMOs for assistance in the past year. Amongst planner types, third-party planners consulted the most DMOs, with an average of 7.9 used in the past year. Corporate planners used the fewest, with an average of 2.9 DMOs reached out to.



Mean Scores by Type



How many different CVBs/DMOs have you contacted for any assistance planning your meetings or events in the PAST 12 MONTHS? Base: 569 Completed Surveys

Destination Research Practices

DMOs have an important role in the destination research phase. While their own experience and word of mouth from their colleagues and other planners are generally the most commonly relied on resources for destination information, DMOs are clearly paramount to many planners in this phase. In fact, for association planners, their CVB contacts are the single most frequently relied on source for destination research. In addition, DMO hosted events (47.6%) and DMO websites (44.1%) are used by nearly half of all planners for destination research purposes.

	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY WIDE
My experience planning meetings in various cities	60.6%	57.6%	57.7%	60.1%	67.6%
Word of mouth (colleagues or other planners)	57.6%	49.7%	61.5%	59.1%	48.6%
Contact at the CVB/DMO	44.5%	55.0%	69.2%	46.4%	58.1%
CVB/DMO hosted event(s) (including FAM tours)	44.5%	56.3%	42.3%	43.8%	47.3%
CVB/DMO Website	42.1%	43.7%	53.8%	42.0%	45.9%
General Internet search	44.2%	43.7%	38.5%	43.0%	40.5%
Hotel corporate sales office	40.3%	39.1%	61.5%	39.4%	41.9%
Hotel local sales office	33.6%	29.8%	30.8%	30.3%	35.1%
CVENT	19.4%	54.3%	23.1%	33.4%	23.0%
Meeting Planner Guide published by DMO	22.1%	28.5%	30.8%	23.1%	35.1%
Trade magazines or other trade publications	18.8%	19.2%	23.1%	17.9%	18.9%
Third party independent planning companies	18.2%	17.9%	11.5%	17.4%	17.6%
Travel magazines and/or travel magazine websites	15.2%	15.9%	11.5%	16.1%	20.3%
Social media websites	13.9%	14.6%	11.5%	14.0%	18.9%
Trade websites (MPIWeb.org, etc.)	11.5%	10.6%	11.5%	9.8%	13.5%
Printed official visitor guides	8.2%	10.6%	0.0%	9.1%	9.5%
Other third party event management software	3.0%	11.3%	3.8%	6.7%	8.1%
EmpowerMINT	1.8%	4.6%	0.0%	1.8%	2.7%
STAR Service Online	0.9%	4.0%	0.0%	1.6%	2.7%
STARCITE	1.2%	2.0%	0.0%	1.3%	1.4%
NONE OF THESE	1.2%	0.7%	0.0%	1.0%	0.0%

In general, which of the following resources do you regularly access when researching destinations in which to hold meetings or events? Base: 569 Completed Surveys

Destination Research Practices—Top 5 by Planner Type

The DMO is present amongst the top five destination most typical research practices across meeting planner types. In addition to DMOs, their own experience and network, third-party planners frequently look to CVENT. Hotel corporate sales offices are go-tos for association and corporate planners. Underlining the importance of good marketing of the DMO site, general internet searches are common research practice for corporate and SMERF planners.

Corporate Planners

1. My experience planning (58.4%)
2. Word of mouth (54.4%)
3. CVB/DMO hosted event(s) (42.4%)
4. Hotel corporate sales office (41.6%)
5. General internet search (40.8%)

Third-Party Planners

1. My experience planning (57.6%)
2. CVB/DMO hosted event(s) (56.3%)
3. Contacts at the CVB/DMO (55.0%)
4. CVENT (54.3%)
5. Word of mouth (49.7%)

Association Planners

1. Contacts at the CVB/DMO (69.2%)
2. Word of mouth (61.5%)
3. Hotel corporate sales office (61.5%)
4. My experience planning (57.7%)
5. CVB/DMO website (53.8%)

SMERF Planners

1. CVB/DMO website (55.7%)
2. My experience planning (53.2%)
3. Word of mouth (51.9%)
4. Contacts at the CVB/DMO (45.6%)
5. General internet search (41.8%)

In general, which of the following resources do you regularly access when researching destinations in which to hold meetings or events? Base: 569 Completed Surveys

How Meeting Planners Describe DMOs (OPEN-ENDED QUESTION)

Meeting planners most commonly describe DMOs as "destination experts" with the general purpose of distributing destination-related information (40.1%). Approximately one-third described the purpose of DMOs as "destination promotion", whether engaging in general promotion (34.3%) or for meetings specifically (31.3%).

	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Destination experts - destination information	41.5%	37.3%	55.0%	42.8%	40.3%
Destination promotion (General)	34.8%	36.5%	15.0%	32.2%	32.3%
Destination promotion (meetings)	32.6%	30.2%	40.0%	30.3%	29.0%
Assist meeting planners (planning information, site visits, etc.)	26.7%	25.4%	35.0%	24.4%	21.0%
Assist meeting planners (RFP distribution, liaison with hotels/businesses)	17.0%	17.5%	15.0%	16.9%	14.5%
Assist meeting planners (event promotion, onsite needs)	12.2%	9.5%	0.0%	9.7%	11.3%
Promotes membership/local businesses	4.1%	8.7%	10.0%	6.3%	4.8%
Brand managers, ambassadors	2.2%	4.0%	0.0%	2.5%	1.6%
Incentives	1.1%	2.4%	5.0%	1.6%	0.0%
Other	1.5%	0.8%	0.0%	1.6%	1.6%
Crisis management	0.0%	0.8%	0.0%	0.3%	1.6%

How would you describe the general purpose of these Convention & Visitors Bureaus/Destination Marketing Organizations? Base: 569 Completed Surveys

Destination Analysts
DO YOUR RESEARCH

What They Say…

They are perfect middle men. Negotiate with hotels and centers. Provide money if needed. Provide services, sites, and other needs.

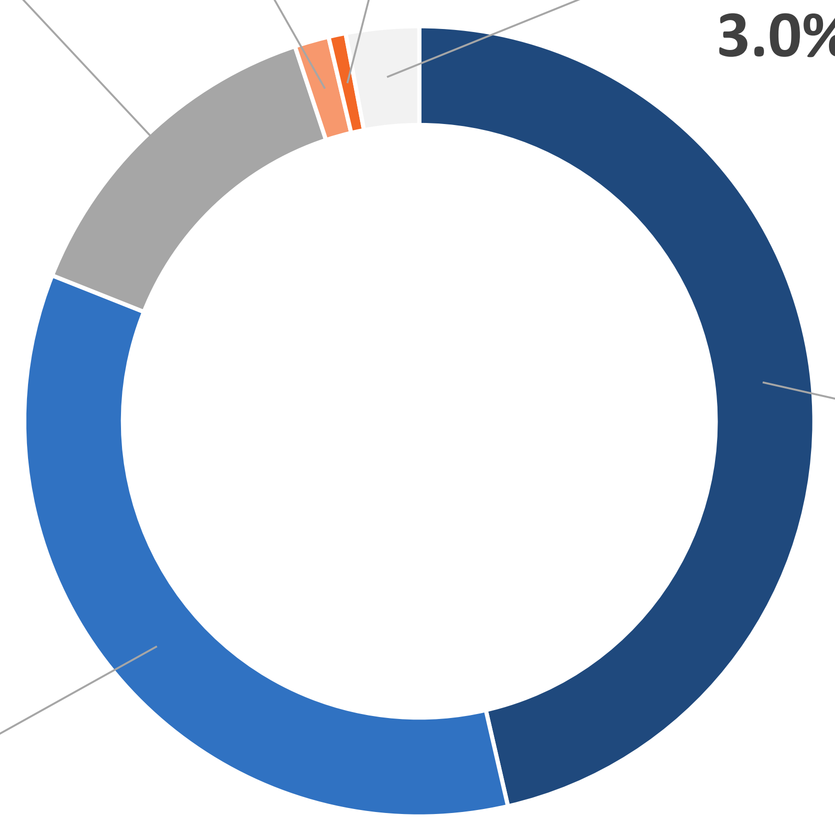
They exist solely to market and sell a particular destination. They have resources available for all aspects of the meeting and/or incentive industry and are an impartial source.

Enlighten the public and meeting planners about the destination, hotels, restaurants, available event spaces.

The general purpose of a CVB from a planner perspective is to assist the planner as a knowledge base for the information a planner would need on hotels, venues, vendors, etc. To be your trustworthy, unbiased partner to assure you are aware of the pros and cons of any hotel or vendor you might be considering.

The DMO is the Destination Expert

A strong majority of meeting planners "agree" (34.6%) or "strongly agree" that "the CVB/DMO is the most expert resource" on their destination. Only 2.1 percent of respondents disagreed with the statement, while 13.9 percent were neutral.



	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Strongly Agree	43.9%	49.7%	57.7%	42.2%	43.2%
Agree	33.9%	36.4%	26.9%	36.3%	39.2%
Neutral	15.2%	13.2%	15.4%	15.5%	16.2%
Disagree	2.1%	0.0%	0.0%	2.1%	1.4%
Strongly Disagree	0.9%	0.0%	0.0%	0.8%	0.0%
Don't know/Not applicable	3.9%	0.7%	0.0%	3.1%	0.0%

Please state your general level of agreement with each of the following statement: The CVB/DMO is the most expert resource on their destination
Base: 569 Completed Surveys

Description of DMOs as a Meetings Resource (open-ended)

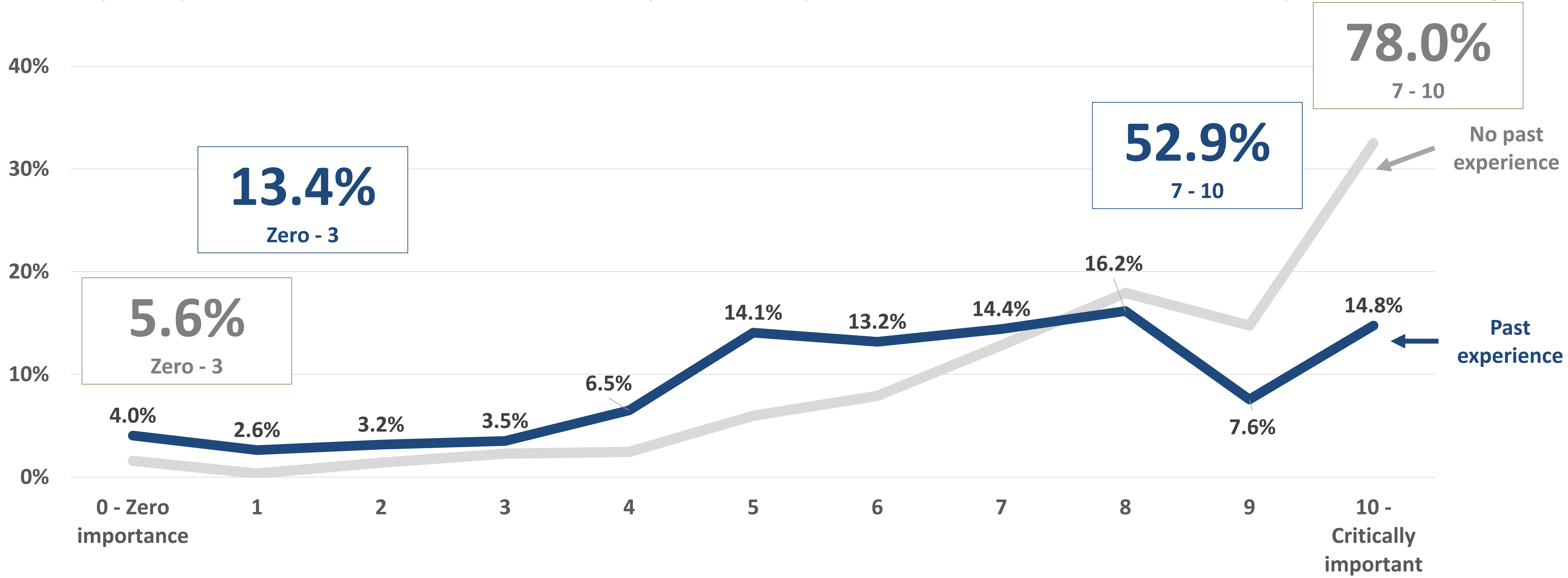
While DMOs' role in the meetings process is largely described as a "one-stop shop" for destination expertise, there is notable lack of specific or varied knowledge of the many functions and services DMOs provide. Meeting planners were asked, in an open-ended format, to describe the CVBs/DMOs role in the meetings process. The chart and table below outline the top cited responses. While DMOs expertise on their destination is noted, there were fewer instances of describing specific ways these organizations assist the meeting planner.

	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Destination expertise - One stop shop	38.6%	46.6%	33.3%	41.6%	50.0%
Site visits - hotel selection help	18.2%	19.8%	16.7%	19.6%	9.3%
Distribute RFPS	11.9%	18.1%	11.1%	11.7%	9.3%
Local connection - Liaison with local stakeholders	11.4%	12.9%	16.7%	12.8%	14.8%
Provides support - saves time and money	11.9%	11.2%	5.6%	10.7%	11.1%
Provide or facilitate incentives	9.7%	8.6%	16.7%	10.0%	9.3%
Sell the city as a place to meet	9.7%	7.8%	5.6%	8.2%	9.3%
Initial contact in a city	5.9%	5.2%	16.7%	6.0%	7.4%
General planning information	7.6%	3.4%	5.6%	6.0%	0.0%
Provide or facilitate incentives	3.4%	9.5%	16.7%	6.4%	5.6%
Start to finish partners	7.2%	1.7%	5.6%	4.3%	9.3%
Help with onsite issues (collateral, vendors, transport, etc.)	3.8%	4.3%	5.6%	3.6%	7.4%
Connections with vendors/service providers	3.4%	1.7%	5.6%	3.6%	0.0%
Help with room blocks	0.0%	0.9%	0.0%	0.4%	1.9%
Offsite events (info, coordinate and help plan)	0.4%	1.7%	0.0%	1.1%	0.0%
Other	1.7%	0.9%	0.0%	1.4%	1.9%

More specifically, how would you describe the CVB/DMOs role in the meetings process? Please provide your description of how and when these organizations affect the meeting planning process. Base: 569 Completed Surveys

Importance of DMO Services to Meeting
(PAST vs. NO PAST EXPERIENCE in the destination)

Lack of understanding of the full breadth of DMO services can be seen in how meeting planners evaluate the DMO's role in destinations in which they are experienced versus inexperienced. Meeting planners consider DMO services particularly important in destinations where they lack experience, however these organizations' perceived value drops once the planner has experience in the destination. More than three-quarters of planners (78.0%) rated the importance of DMOs in destinations they are unfamiliar with as 7 or higher on a 10-point importance scale. However, in familiar destinations, just over half of planners consider DMO services to be of similar importance(52.9%, rating 7 or higher).

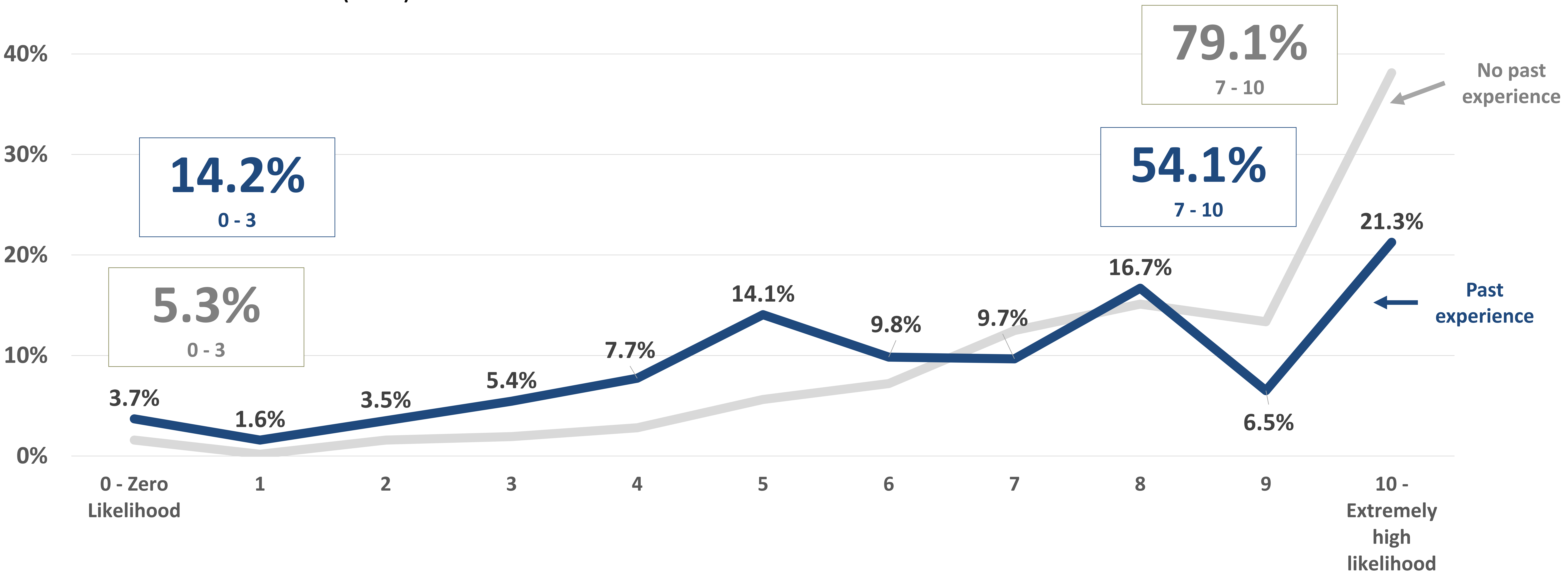


Thinking about destinations in which you have past experience planning meetings or events, how important are DMOs/CVBs services to you? Thinking about destinations in which you have no prior planning experience, how important are DMOs/CVBs services to you? Base: 569 Completed Surveys

Likelihood to Reach out to a DMO for Assistance

(PAST vs. NO PAST EXPERIENCE in the destination)

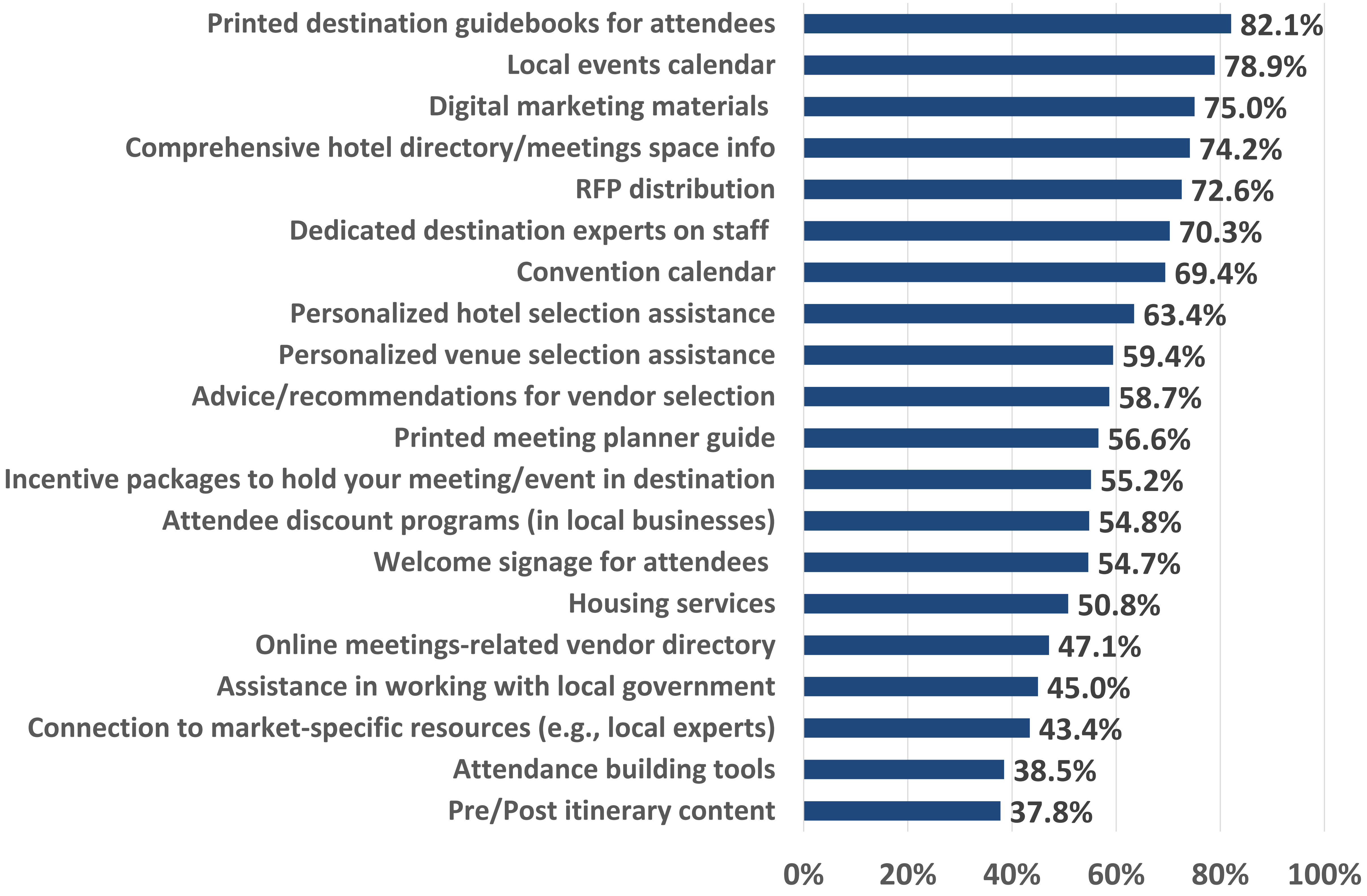
Along a similar vein, four-in-five planners are likely to contact a DMO for assistance in an unfamiliar destination (79.1%); however, if they have experience in that destination just over half would reach out to the DMO (54.1%).



Again, when you are planning a meeting or event in a destination in which you have past experience, how likely are you to reach out to a DMO/CVB for assistance? Now, when you are planning a meeting or event in a destination in which you have no prior experience, how likely are you to reach out to a DMO/CVB for assistance?
Base: 569 Completed Surveys

Awareness of DMO Resources & Services

Meeting planners were most aware of DMOs providing printed destination guidebooks (82.1%), local events calendars (78.9%), digital marketing materials (75.0%) and information about hotels and meeting spaces (74.2%) to planners. There is less awareness of services which could assist meeting planners in some of their key objectives such as as attendance building tools (38.5%) and pre/post itinerary content (37.8%).

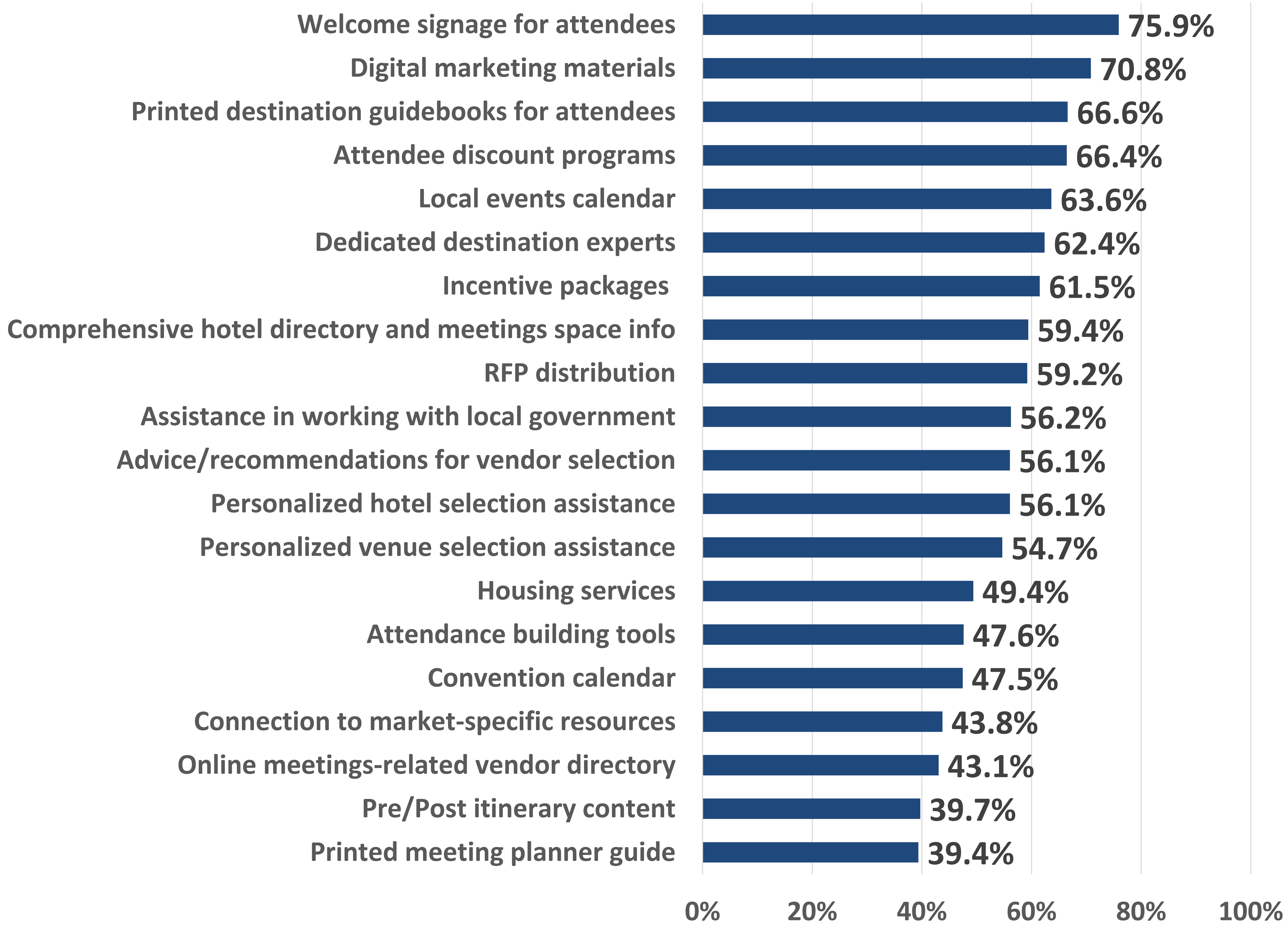


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY WIDE
Printed guidebooks for attendees	80.9%	82.1%	96.2%	81.3%	79.7%
Local events calendar	73.6%	86.8%	76.9%	77.7%	83.8%
Digital marketing materials	73.6%	79.5%	84.6%	75.1%	73.0%
Comprehensive hotel/meetings space info	73.6%	76.8%	69.2%	72.0%	78.4%
RFP distribution	70.9%	80.1%	88.5%	71.0%	68.9%
Dedicated destination experts on staff	63.9%	78.8%	88.5%	66.8%	68.9%
Convention calendar	66.7%	80.1%	57.7%	69.4%	71.6%
Personalized hotel selection assistance	58.5%	72.8%	76.9%	63.0%	59.5%
Personalized venue selection assistance	54.8%	70.9%	57.7%	59.3%	64.9%
Advice for vendor selection	55.2%	68.2%	73.1%	56.5%	58.1%
Printed meeting planner guide	52.7%	65.6%	65.4%	56.7%	63.5%
Incentive packages	51.5%	63.6%	65.4%	53.9%	62.2%
Attendee discount programs	55.2%	57.6%	61.5%	53.4%	66.2%
Welcome signage for attendees	50.6%	59.6%	69.2%	50.5%	58.1%
Housing services	48.8%	58.9%	61.5%	49.0%	55.4%
Online meetings-related vendor directory	47.3%	54.3%	42.3%	45.1%	63.5%
Assistance in working with local government	40.0%	53.6%	50.0%	43.0%	54.1%
Connection to market-specific resources	40.0%	53.0%	42.3%	41.5%	45.9%
Attendance building tools	36.4%	45.0%	38.5%	35.8%	47.3%
Pre/Post itinerary content	33.9%	47.0%	50.0%	38.1%	45.9%

Which of the following services were you aware that CVBs/DMOs provide meeting planners? (Select all that apply) Base: 569 Completed Surveys

CITYWIDE CONVENTION: DMO Resources They're Likely to Use

For citywide conventions, planners are more likely to use DMO services overall, with welcome signage for attendees (75.9%), digital marketing materials (70.8%) printed destination guidebooks for attendees (66.6%) and attendee discount programs (66.4%) amongst the most popular. Association planners are more likely than corporate planners to utilize DMO resources.

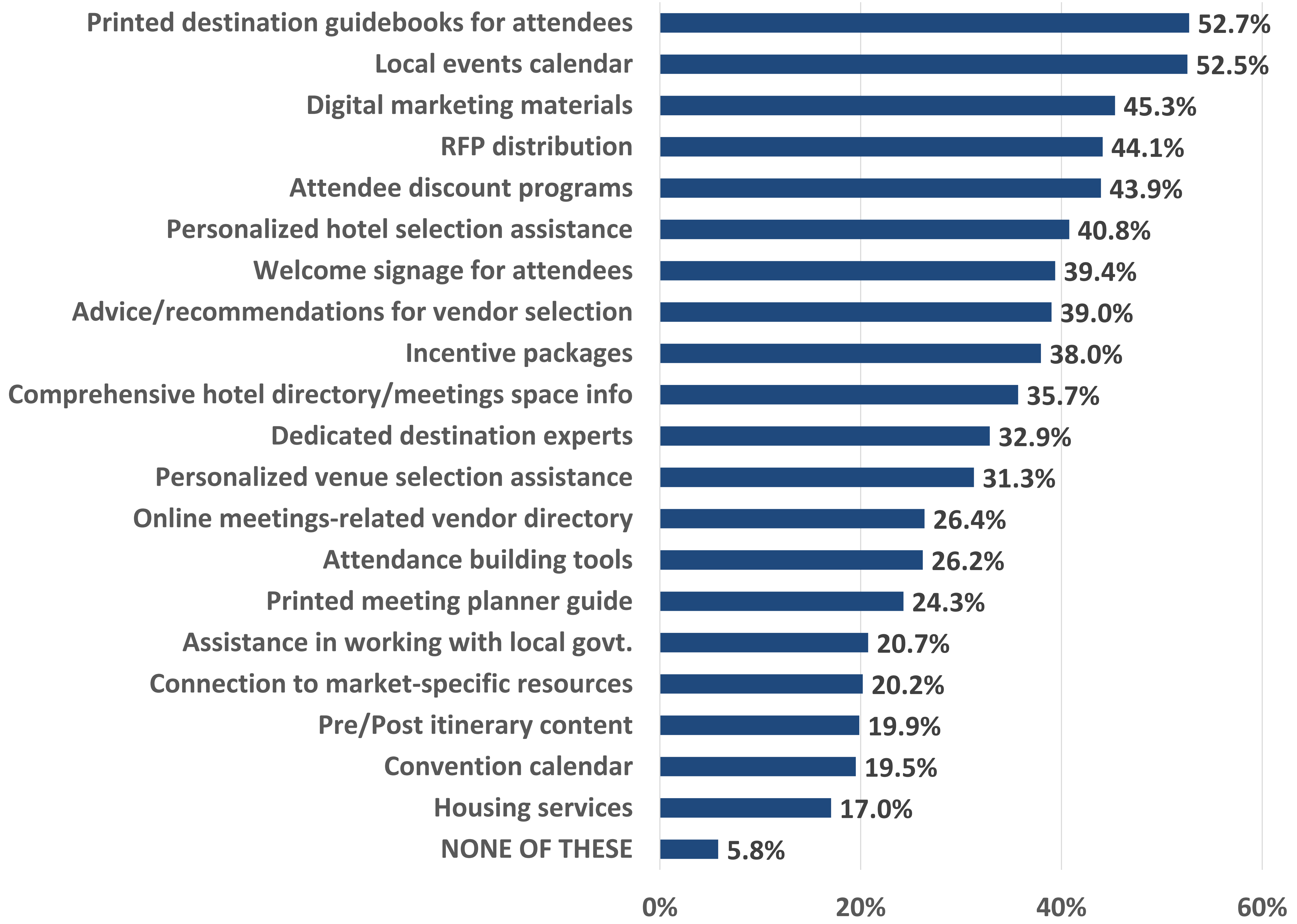


	CORP.	3RD PARTY	ASSOC.
Welcome signage for attendees	73.6%	77.5%	88.5%
Digital marketing materials	67.6%	75.5%	92.3%
Printed destination guidebooks for attendees	67.3%	62.3%	73.1%
Attendee discount programs	65.8%	72.2%	57.7%
Local events calendar	60.6%	70.2%	61.5%
Dedicated destination experts	56.4%	70.9%	80.8%
Incentive packages	58.2%	72.2%	57.7%
Comprehensive hotel directory and meetings space info	57.0%	64.2%	69.2%
RFP distribution	57.6%	60.9%	84.6%
Assistance in working with local government	53.3%	63.6%	57.7%
Personalized hotel selection assistance	53.3%	58.9%	61.5%
Advice/recommendations for vendor selection	52.4%	64.2%	73.1%
Personalized venue selection assistance	53.0%	57.6%	61.5%
Housing services	46.4%	58.3%	50.0%
Attendance building tools	44.5%	49.7%	53.8%
Convention calendar	44.5%	56.3%	38.5%
Connection to market-specific resources	37.6%	57.0%	50.0%
Online meetings-related vendor directory	42.1%	49.7%	50.0%
Pre/Post itinerary content	35.5%	51.0%	34.6%
Printed meeting planner guide	40.0%	39.1%	38.5%

Imagine you are planning a large citywide convention. Which of the following services provided by a DMO/CVB would you be likely to use? (Select all that apply) Base: 569 Completed Surveys

SELF-CONTAINED: DMO Resources They’re Likely to Use

For medium sized in-house meetings, planners are overall less likely to utilize DMO resources compared to citywide conventions. However, amongst the resources tested, planners are most likely to use printed destination guidebooks for attendees (52.7%) and local events calendars (52.5%). Again, association planners are generally much more likely to use DMO services for these meetings compared to corporate planners.

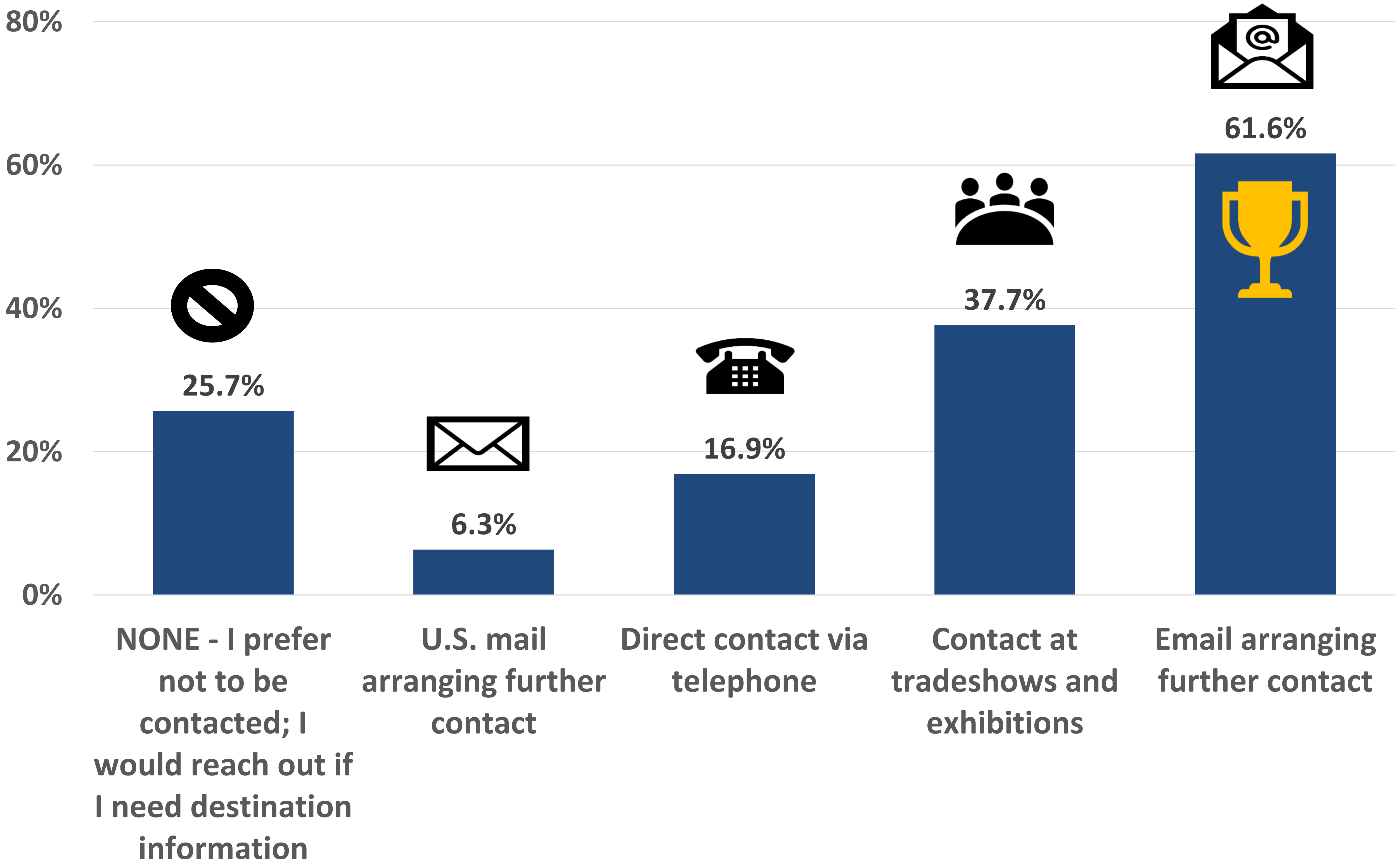


	CORP.	3RD PARTY	ASSOC.
Printed destination guidebooks for attendees	53.3%	50.3%	53.8%
Local events calendar	50.3%	55.0%	46.2%
Digital marketing materials	43.0%	48.3%	69.2%
RFP distribution	42.7%	43.7%	73.1%
Attendee discount programs	42.4%	47.7%	46.2%
Personalized hotel selection assistance	39.1%	41.7%	50.0%
Welcome signage for attendees	37.9%	41.1%	46.2%
Advice/recommendations for vendor selection	36.4%	45.7%	57.7%
Incentive packages	30.3%	57.6%	38.5%
Comprehensive hotel directory/ meetings space info	34.5%	35.1%	42.3%
Dedicated destination experts	30.3%	36.4%	42.3%
Personalized venue selection assistance	27.9%	37.1%	46.2%
Online meetings-related vendor directory	23.6%	34.4%	23.1%
Attendance building tools	23.3%	33.1%	23.1%
Printed meeting planner guide	23.3%	26.5%	26.9%
Assistance in working with local government	17.6%	27.8%	19.2%
Connection to market-specific resources	18.5%	24.5%	19.2%
Pre/Post itinerary content	14.8%	29.1%	15.4%
Convention calendar	17.0%	23.2%	26.9%
Housing services	19.1%	15.2%	23.1%
NONE OF THESE	6.7%	4.6%	0.0%

Imagine you are planning a medium-sized, in-house meeting. Which of the following services provided by a DMO/CVB would you be likely to use? (Select all that apply) Base: 569 Completed Surveys

Preferred Method of Contact

The most preferred method of solicitation by DMO sales teams to meeting planners is via email. In total, 61.6 percent of meeting planners said that email arranging further contact was their preferred solicitation method followed by contact at tradeshows and exhibitions (37.7%). A quarter of planners, however, prefer not to be contacted (25.7%)

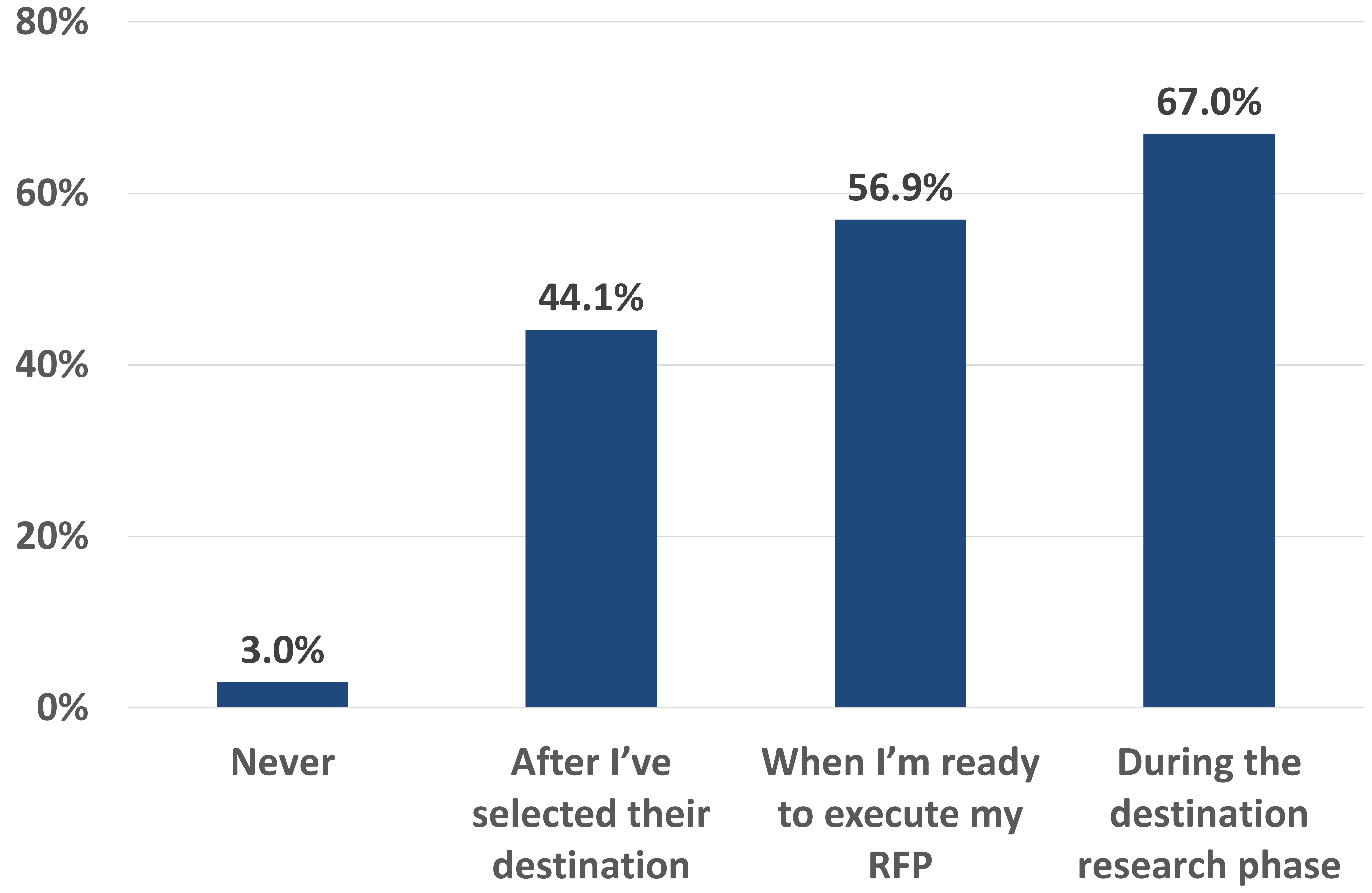


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Email arranging further contact	61.1%	63.6%	65.4%	61.6%	65.8%
Contact at tradeshows and exhibitions	34.7%	42.4%	53.8%	36.4%	46.6%
Direct contact via telephone	18.2%	10.6%	23.1%	17.4%	30.1%
U.S. mail arranging further contact	7.3%	3.3%	11.5%	4.9%	9.6%
NONE - I prefer not to be contacted; I would reach out if I need destination information	26.7%	25.2%	19.2%	27.3%	20.5%

How would you generally prefer to be solicited by Convention & Visitors Bureau sales teams? (Select all that apply)   Base: 569 Completed Surveys

Desired Points of Contact with DMO

Two-thirds of meeting planners wish to communicate directly with DMO sales staff members during the destination research phase (67.0%), and 56.9 percent still want contact when they are ready to execute their RFP. Reported desire for contact with DMO sales staff decreases after the destination has been selected (44.1%).

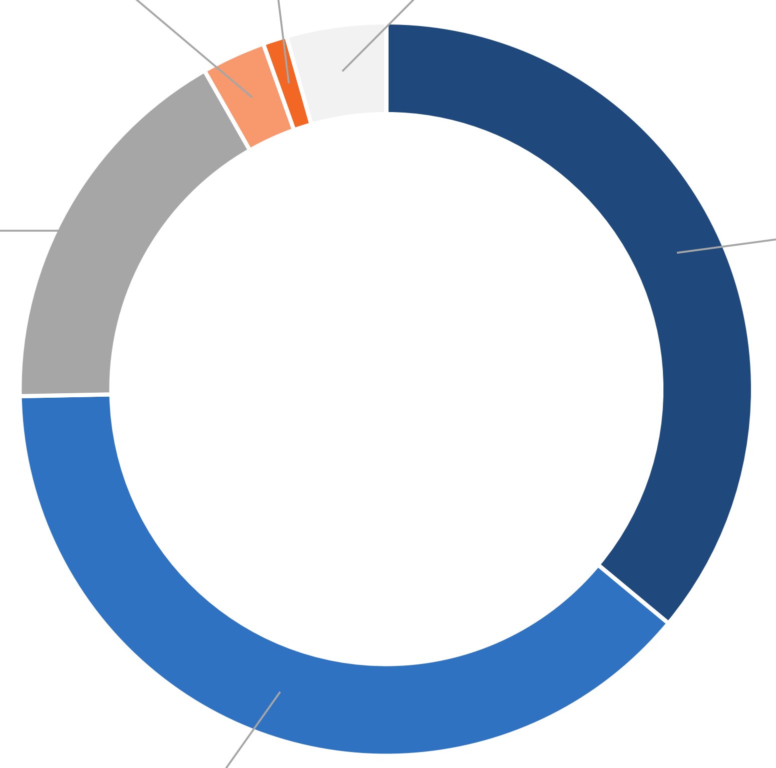


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
During the destination research phase	63.6%	76.2%	61.5%	65.0%	70.3%
When I'm ready to execute my RFP	58.2%	58.9%	69.2%	56.7%	64.9%
After I've selected their destination	46.4%	39.1%	38.5%	45.3%	45.9%
Never	4.2%	0.7%	0.0%	3.4%	4.1%

At what point do you typically wish to communicate directly with a Convention & Visitors Bureau sales staff member? (Select all that apply) Base: 569 Completed Surveys

Agreement on Customer Service

A majority of meeting planners "agree" (38.7%) or "strongly agree" (36.0%) that DMOs are typically willing to go above and beyond to ensure the success of a meeting (74.7%). Association planners are in the strongest agreement with this sentiment on DMOs.

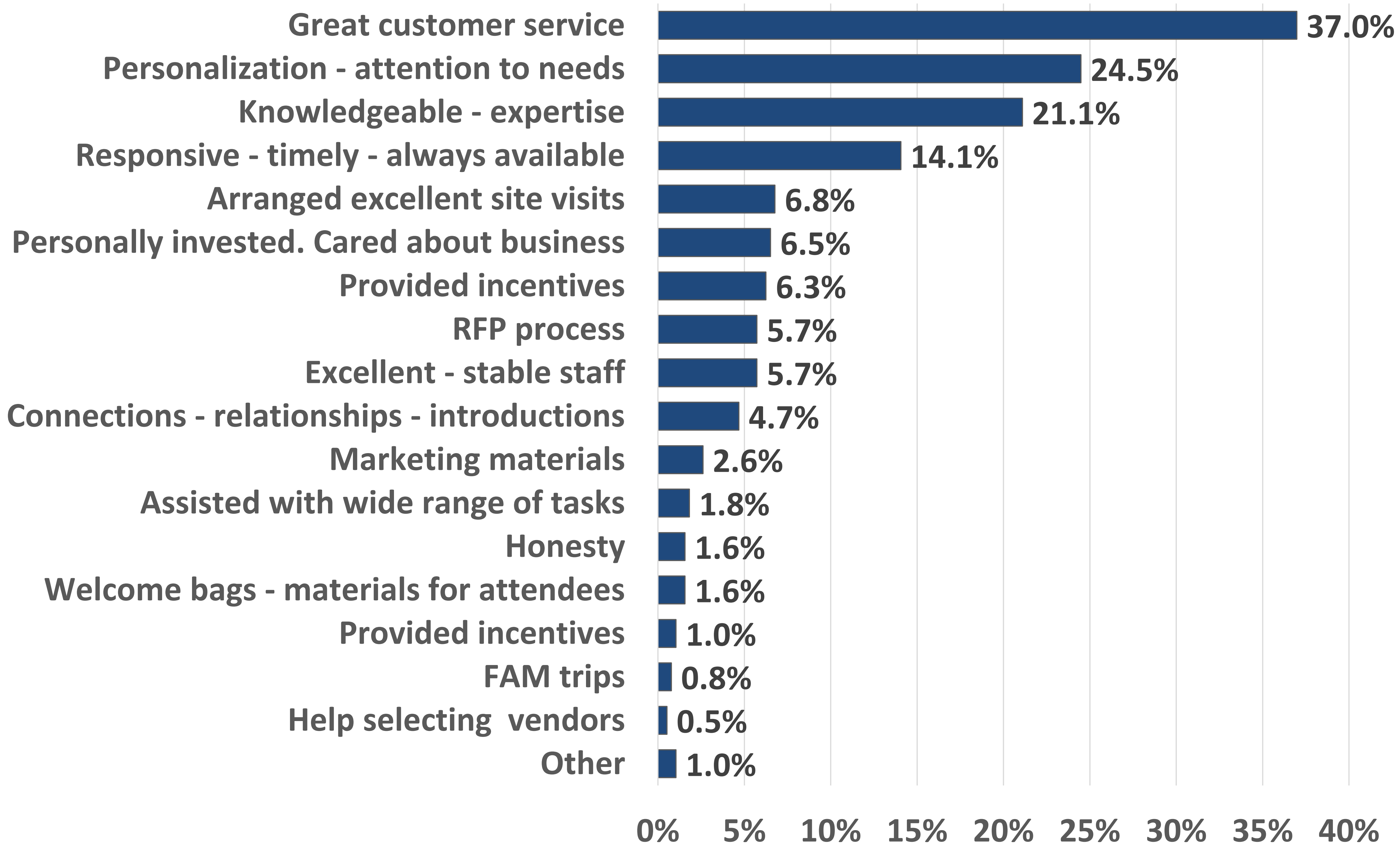


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Strongly Agree	33.9%	35.8%	46.2%	33.2%	40.5%
Agree	37.9%	43.7%	34.6%	38.3%	39.2%
Neutral	18.5%	16.6%	15.4%	19.4%	20.3%
Disagree	2.1%	2.6%	3.8%	3.6%	0.0%
Strongly Disagree	1.2%	0.7%	0.0%	1.3%	0.0%
Don't know/Not applicable	6.4%	0.7%	0.0%	4.1%	0.0%

Please state your general level of agreement with each of the following statement: From a service standpoint, CVBs/DMOs are typically willing to go above and beyond in order to ensure a meeting/event's success. Base: 569 Completed Surveys

Key Factors in Exceptional DMO Experiences
(OPEN-ENDED QUESTION)

Key factors in determining an exceptional experience with CVBs included great customer service (37.0%), personalization (24.5%) and expertise (21.1%). "Great customer service" was described as professionalism, communication, follow though and attention to detail. Responsiveness was also a notable factor planners cited as contributing to an exceptional experience they've had working with a CVB.

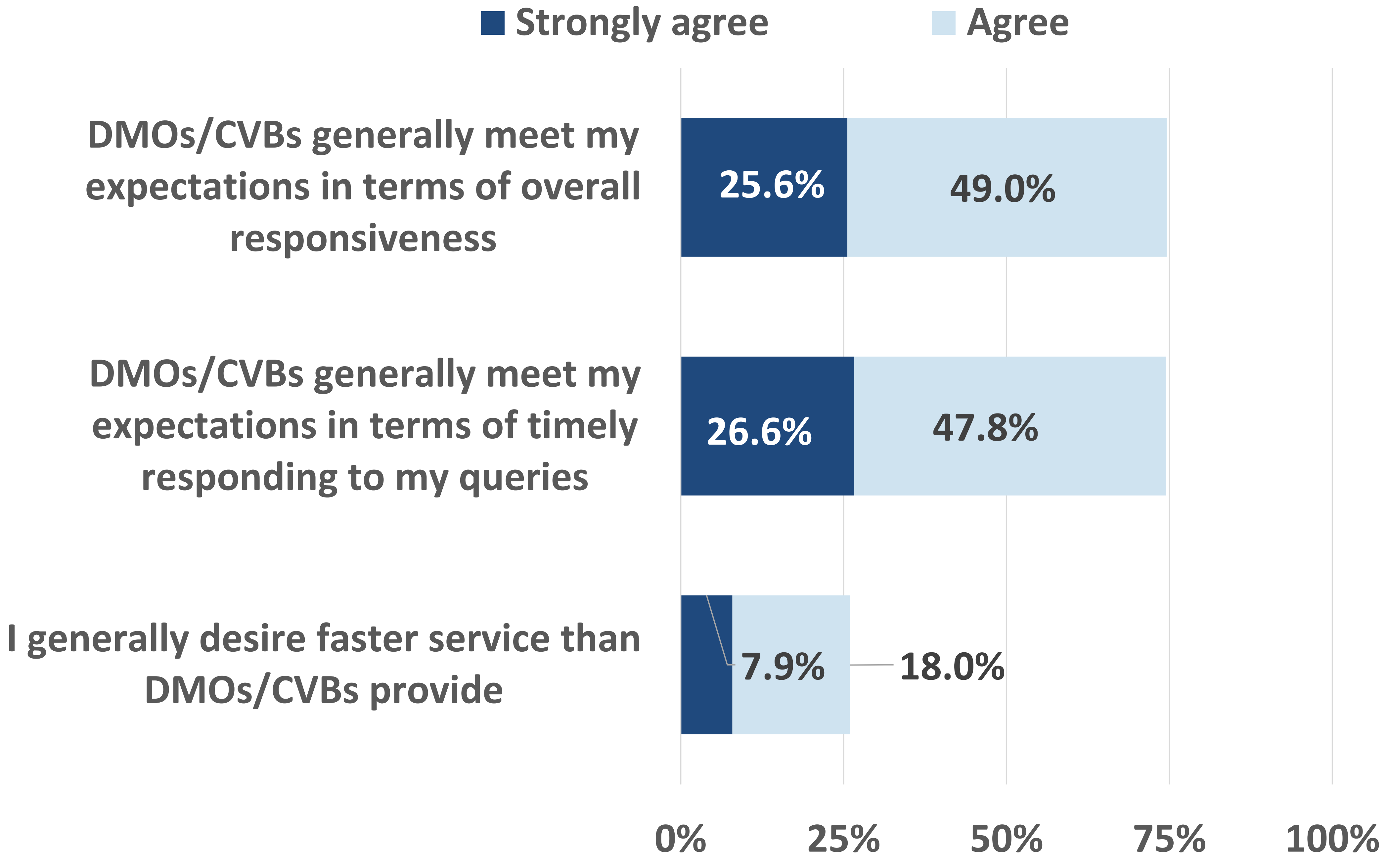


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Great customer service	38.8%	30.0%	47.1%	37.2%	41.7%
Personalization - attention to needs	23.3%	21.8%	35.3%	22.2%	8.3%
Knowledgeable - expertise	21.0%	24.5%	17.6%	20.7%	33.3%
Responsive - timely - always available	13.2%	14.5%	41.2%	14.9%	16.7%
Arranged excellent site visits	5.9%	10.0%	0.0%	8.8%	6.3%
Personally invested. Cared about business	5.9%	9.1%	0.0%	8.4%	2.1%
Provided incentives	5.9%	7.3%	0.0%	7.3%	4.2%
RFP process	4.6%	10.0%	0.0%	6.1%	2.1%
Excellent - stable staff	6.4%	6.4%	0.0%	6.5%	10.4%
Connections - relationships - introductions	5.5%	2.7%	5.9%	5.0%	4.2%
Marketing materials	2.7%	1.8%	0.0%	2.7%	4.2%
Assisted with wide range of tasks	2.7%	0.9%	0.0%	1.1%	0.0%
Honesty	1.8%	1.8%	0.0%	1.9%	2.1%
Welcome bags - materials for attendees	0.9%	2.7%	0.0%	1.1%	2.1%
Provided incentives	0.0%	3.6%	0.0%	1.1%	0.0%
FAM trips	0.0%	1.8%	5.9%	0.8%	2.1%
Help selecting vendors	0.5%	0.9%	0.0%	0.0%	2.1%
Other	1.4%	0.0%	0.0%	1.1%	0.0%

Please think of the experiences you have had with Convention & Visitors Bureaus (CVBs) that have been exceptional. What are the key factors that made the experience with these CVBs exceptional?
Base: 569 Completed Surveys

Opinions on DMO Service

Overall, a majority of meeting planners agree that DMOs/CVBs meet their expectations in terms of responsiveness. Three-quarters of meeting planners “agree” or “strongly agree” that DMOs generally meet their expectations in terms of overall responsiveness (74.6%) and responding in a timely fashion to their queries (74.4%). However, 25.9 percent of planners generally desire faster service from DMOs/CVBs. Third-party planners were the most likely to say they desired faster services than DMOs currently provide.

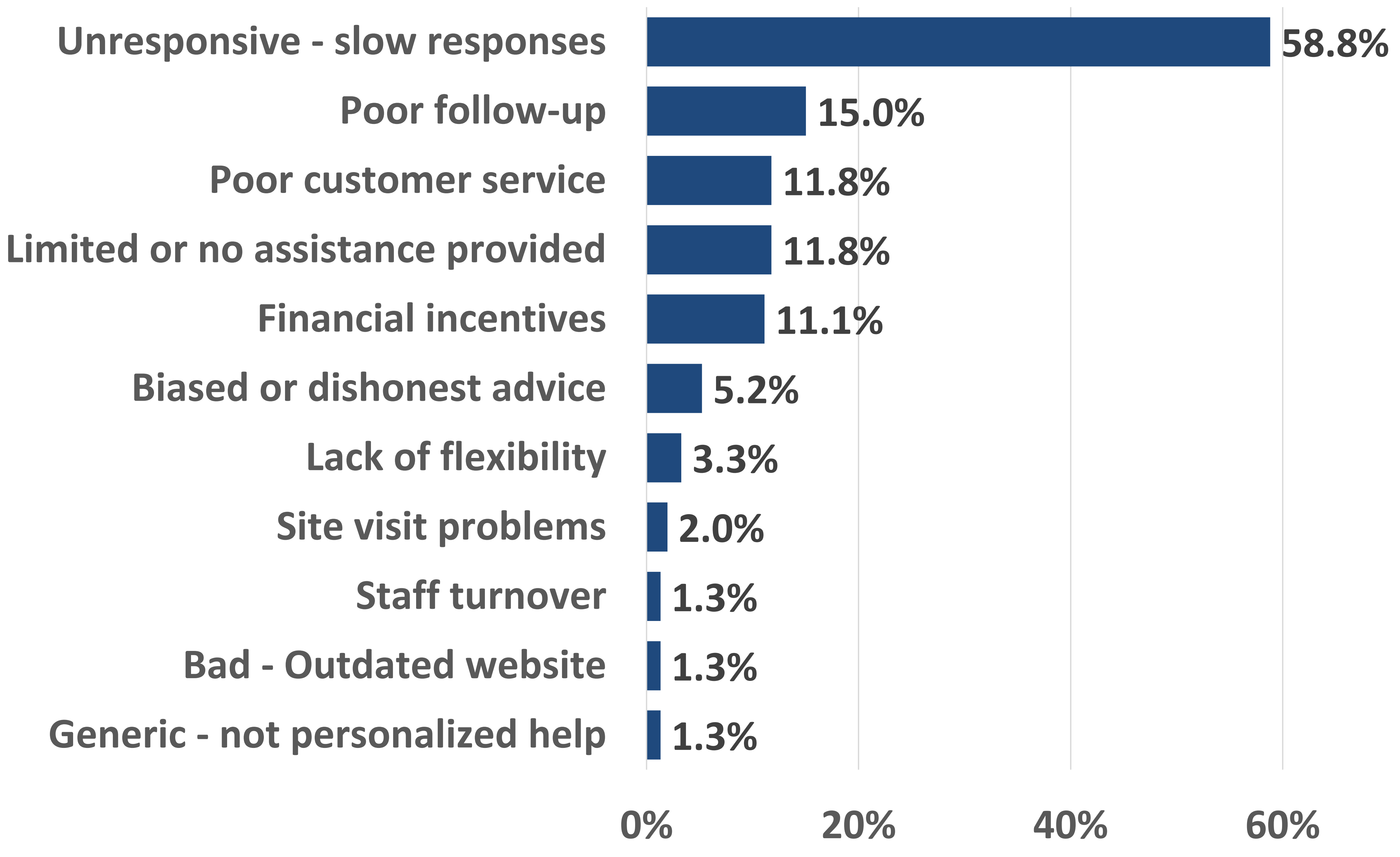


TOP TWO BOX SCORE (“Strongly agree” or “Agree”)	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
DMOs/CVBs generally meet my expectations in terms of timely responding to my queries	72.9%	75.3%	80.8%	71.9%	80.8%
DMOs/CVBs generally meet my expectations in terms of overall responsiveness	73.3%	74.0%	84.6%	72.1%	80.8%
I generally desire faster service than DMOs/CVBs provide	20.4%	35.3%	23.1%	26.0%	32.9%

Please state your general level of agreement to each of the following statements. Base: 569 Completed Surveys

How DMOs Fail to Meet Expectations
(Experiences with DMOs in Past 12 Months)

Being unresponsive or slow to respond was the top reason meeting planners cited for why they felt DMOs had failed to meet their expectations for overall responsiveness in the past year (58.8%).



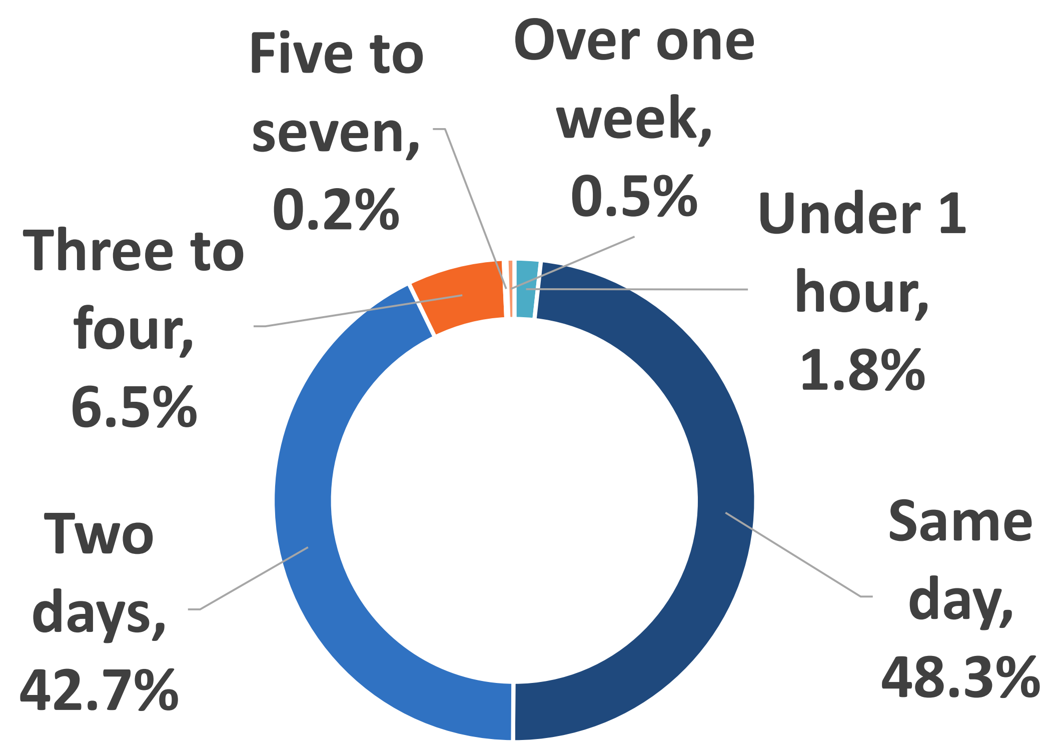
	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Unresponsive - slow responses	52.2%	69.4%	50.0%	58.5%	64.3%
Poor follow-up	14.5%	12.9%	25.0%	13.2%	7.1%
Poor customer service	10.1%	9.7%	37.5%	11.3%	14.3%
Limited or no assistance provided	10.1%	9.7%	37.5%	11.3%	14.3%
Financial incentives	11.6%	11.3%	0.0%	9.4%	10.7%
Biased or dishonest advice	8.7%	1.6%	0.0%	6.6%	7.1%
Lack of flexibility	4.3%	3.2%	0.0%	3.8%	3.6%
Site visit problems	1.4%	1.6%	0.0%	2.8%	0.0%
Staff turnover	1.4%	0.0%	0.0%	0.9%	0.0%
Bad - Outdated website	1.4%	1.6%	0.0%	0.9%	0.0%
Generic - not personalized help	1.4%	1.6%	0.0%	1.9%	3.6%

In the PAST TWELVE (12) MONTHS, in which ways have CVBs/DMOs not met your expectations for overall responsiveness?
Base: 153 Completed Surveys

Maximum Acceptable Response Times

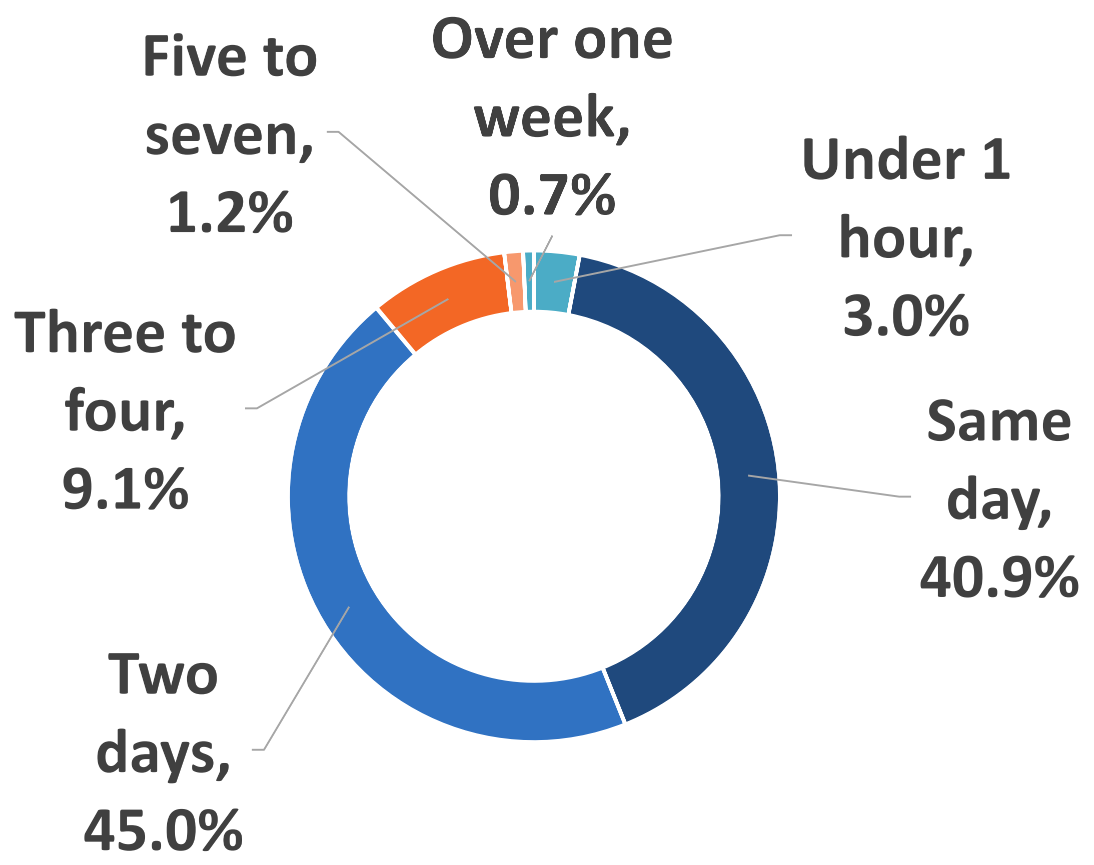
Meeting planners generally expect a response to a call or a question from a CVB within one to two days. Approximately half of meeting planners expect their phone calls to be returned within one day (48.3%) while 42.7 percent feel that two days is the maximum acceptable wait time for a CVB to return their call. Planners are slightly more lax on waiting for an answer to their questions with 40.9 percent expecting a response the same day and 45.0 percent expecting an answer within two days.

Return Phone Call



	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY WIDE
Under 1 hour	1.5%	2.6%	0.0%	2.3%	4.1%
Same day	42.7%	57.6%	42.3%	47.4%	51.4%
2 days	48.5%	33.8%	42.3%	43.5%	35.1%
3-4 days	6.7%	4.6%	15.4%	6.0%	9.5%
5-7 days	0.3%	0.0%	0.0%	0.0%	0.0%
Over 1 week	0.3%	1.3%	0.0%	0.8%	0.0%

Answer my Questions



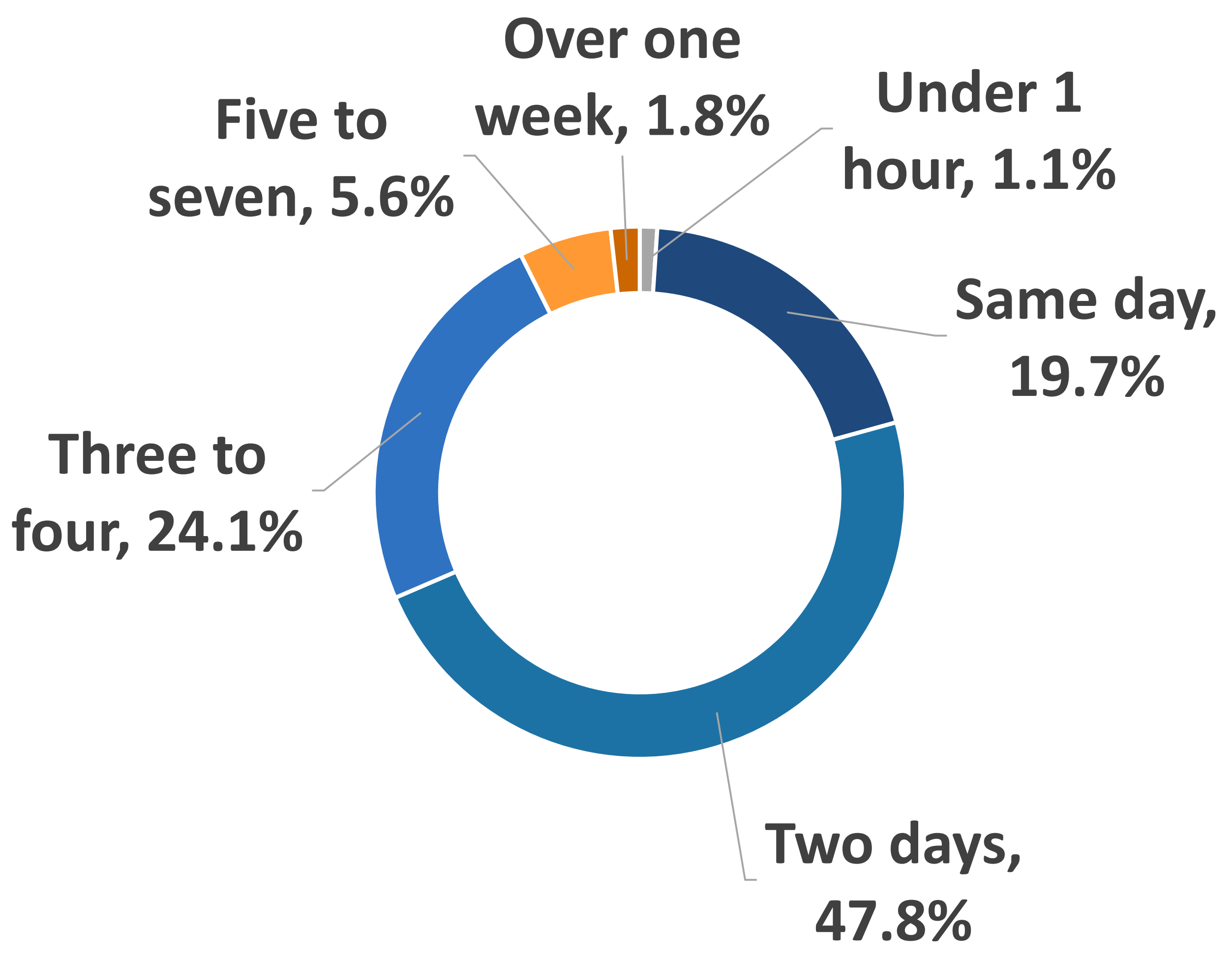
	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY WIDE
Under 1 hour	2.4%	4.6%	0.0%	2.8%	5.4%
Same day	38.2%	44.4%	34.6%	40.9%	40.5%
2 days	48.2%	39.1%	50.0%	45.3%	37.8%
3-4 days	10.0%	7.9%	11.5%	9.1%	16.2%
5-7 days	0.9%	2.6%	0.0%	1.3%	0.0%
Over 1 week	0.3%	1.3%	3.8%	0.5%	0.0%

Assume you are using each of the following CVB services listed below. How long in general would be the maximum length of time you would find acceptable to wait for service?
Base: 569 Completed Surveys

Maximum Acceptable Response Times

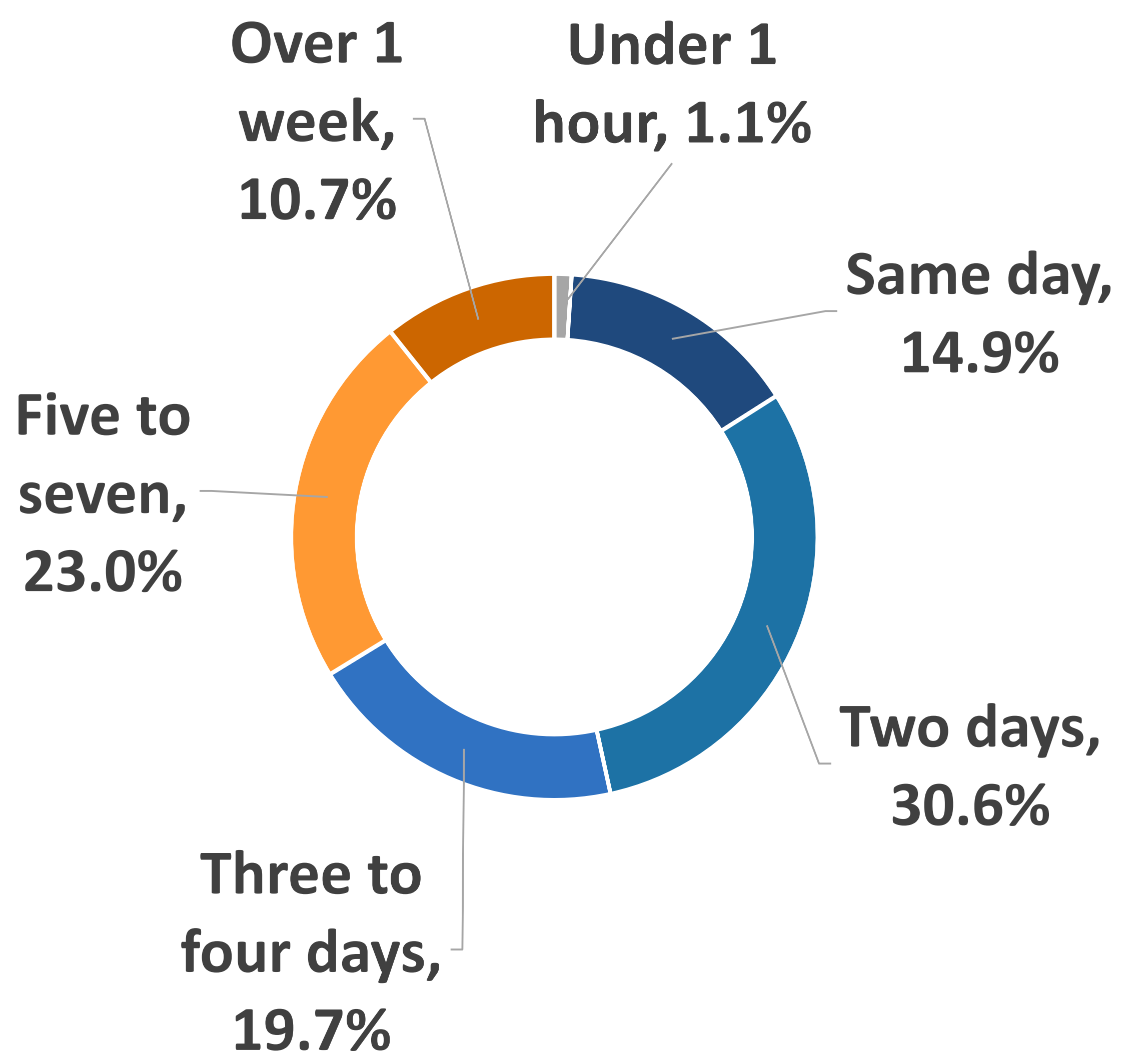
Approximately one-in-five meeting planners expect their RFP to be distributed within one day (20.8%--including the 1.1 percent who expect it to be sent in under an hour). 47.8 percent feel two days is an acceptable wait time for distribution. In terms of response time to their RFPs, 14.9 percent of planners expect a response the same day, 30.6 percent expecting a response within two days and 19.7 percent expect a response within three to four days.

Distribute RFP



	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY WIDE
Under 1 hour	0.9%	2.0%	0.0%	1.3%	1.4%
Same day	17.3%	27.2%	11.5%	19.7%	17.6%
2 days	51.5%	43.0%	42.3%	49.5%	40.5%
3-4 days	21.8%	23.2%	38.5%	23.3%	33.8%
5-7 days	6.4%	4.0%	3.8%	4.4%	5.4%
Over 1 week	2.1%	0.7%	3.8%	1.8%	1.4%

Respond to RFP

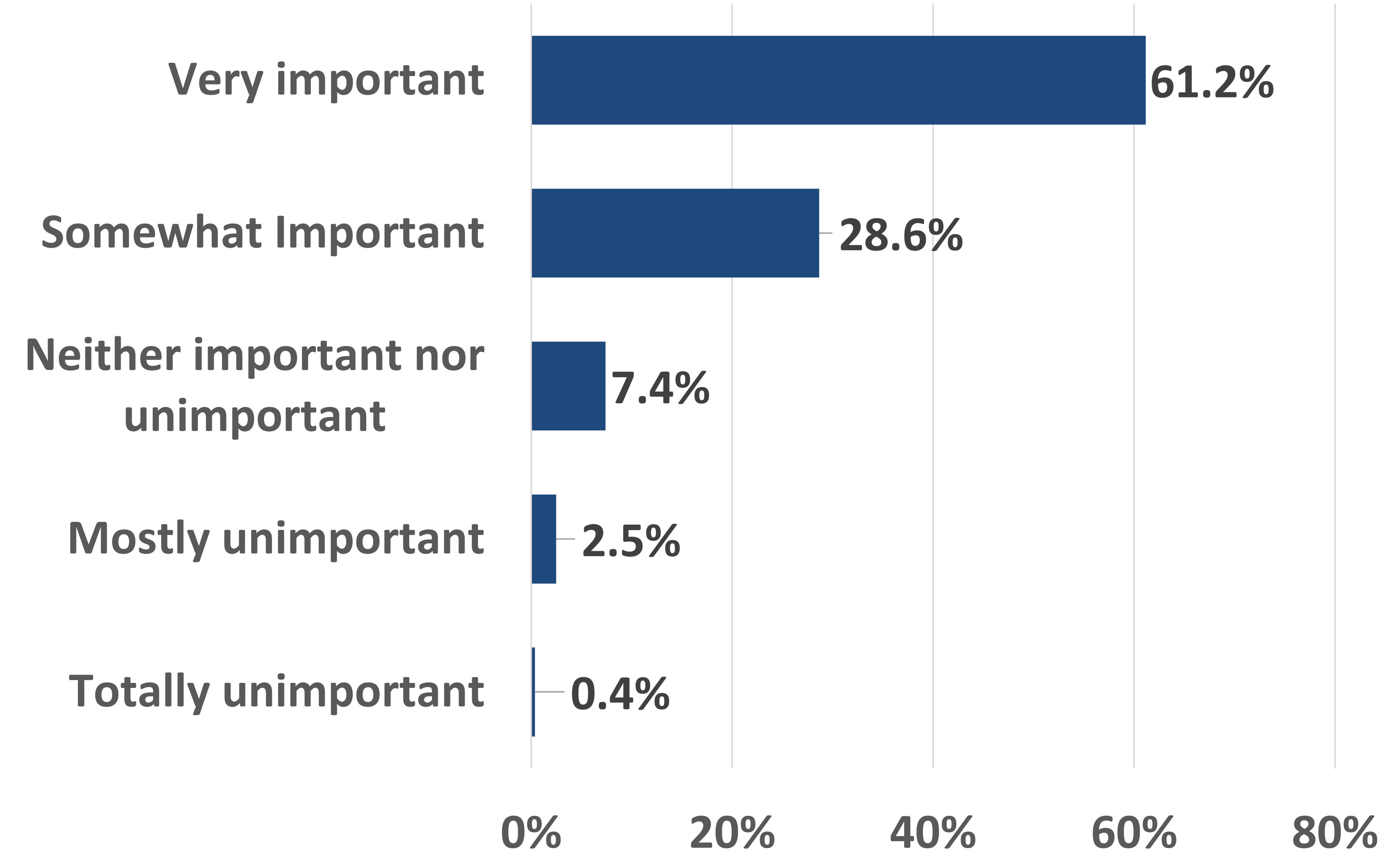


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITY WIDE
Under 1 hour	1.2%	1.3%	0.0%	1.6%	1.4%
Same day	13.3%	18.5%	11.5%	14.8%	20.3%
2 days	28.2%	37.7%	26.9%	33.2%	23.0%
3-4 days	20.0%	16.6%	26.9%	18.9%	17.6%
5-7 days	24.5%	19.9%	15.4%	22.3%	24.3%
Over 1 week	12.7%	6.0%	19.2%	9.3%	13.5%

Assume you are using each of the following CVB services listed below. How long in general would be the maximum length of time you would find acceptable to wait for service?
Base: 569 Completed Surveys

Importance of DMOs to Meetings Industry

Three in five meeting planners consider CVBs/DMOs to be "very important" to the meetings industry (61.2%) while an additional 28.6 percent consider them to be "somewhat important." Less than 3 percent consider these organizations unimportant.

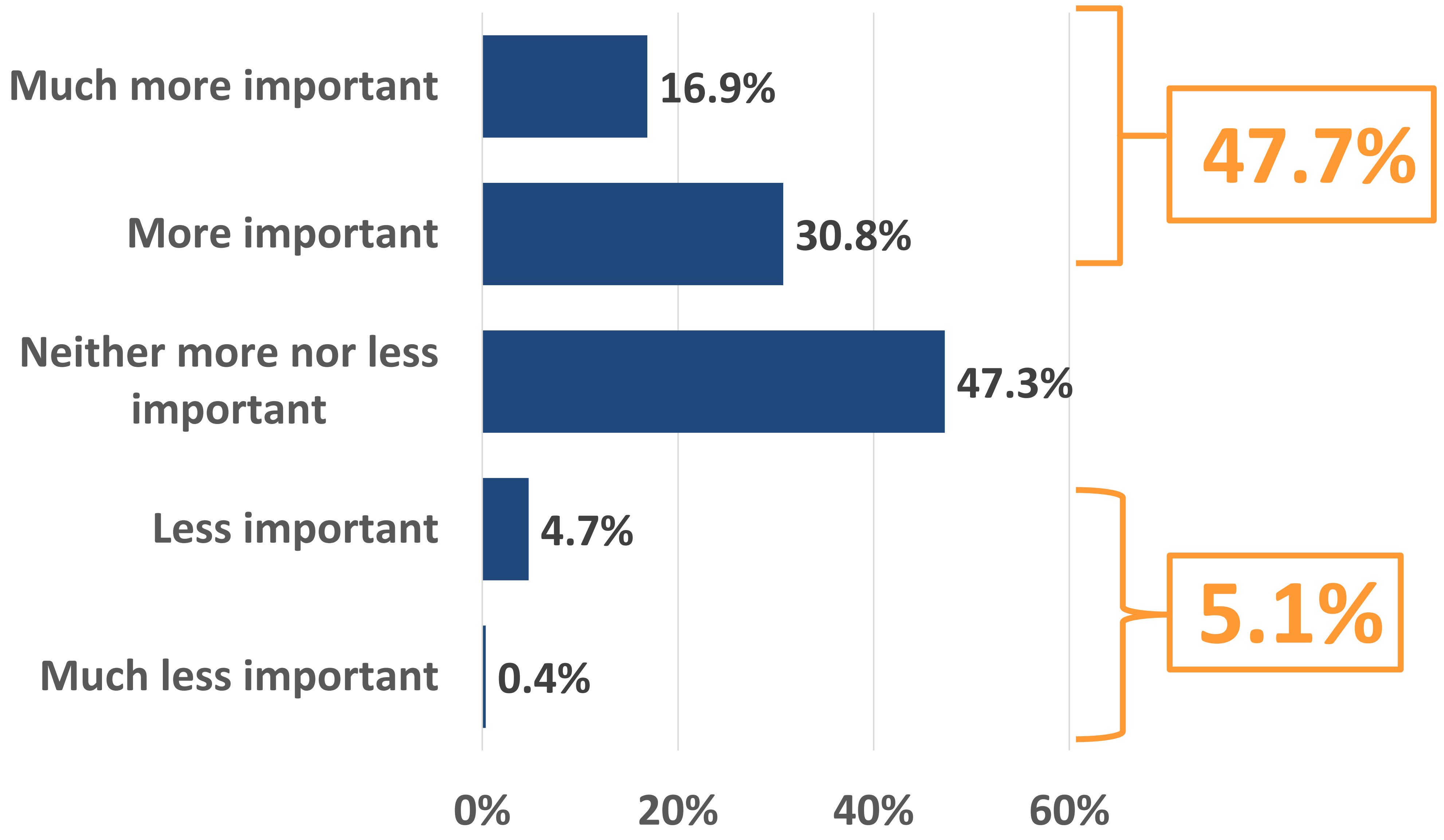


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Very important	59.4%	63.6%	65.4%	58.5%	63.5%
Somewhat Important	28.2%	27.8%	30.8%	28.8%	23.0%
Neither important nor unimportant	9.7%	5.3%	0.0%	9.1%	10.8%
Mostly unimportant	2.1%	3.3%	3.8%	3.1%	1.4%
Totally unimportant	0.6%	0.0%	0.0%	0.5%	1.4%

In terms of their overall importance to the meetings industry, how important are DMOs/CVBs? Base: 569 Completed Surveys

The Changing Importance of DMOs

Nearly half of all meeting planners believe DMOs/CVBs are becoming more important to the meetings industry (47.7%). A similar proportion feel their importance is not changing. Just 5.1 percent feel they are becoming less important.

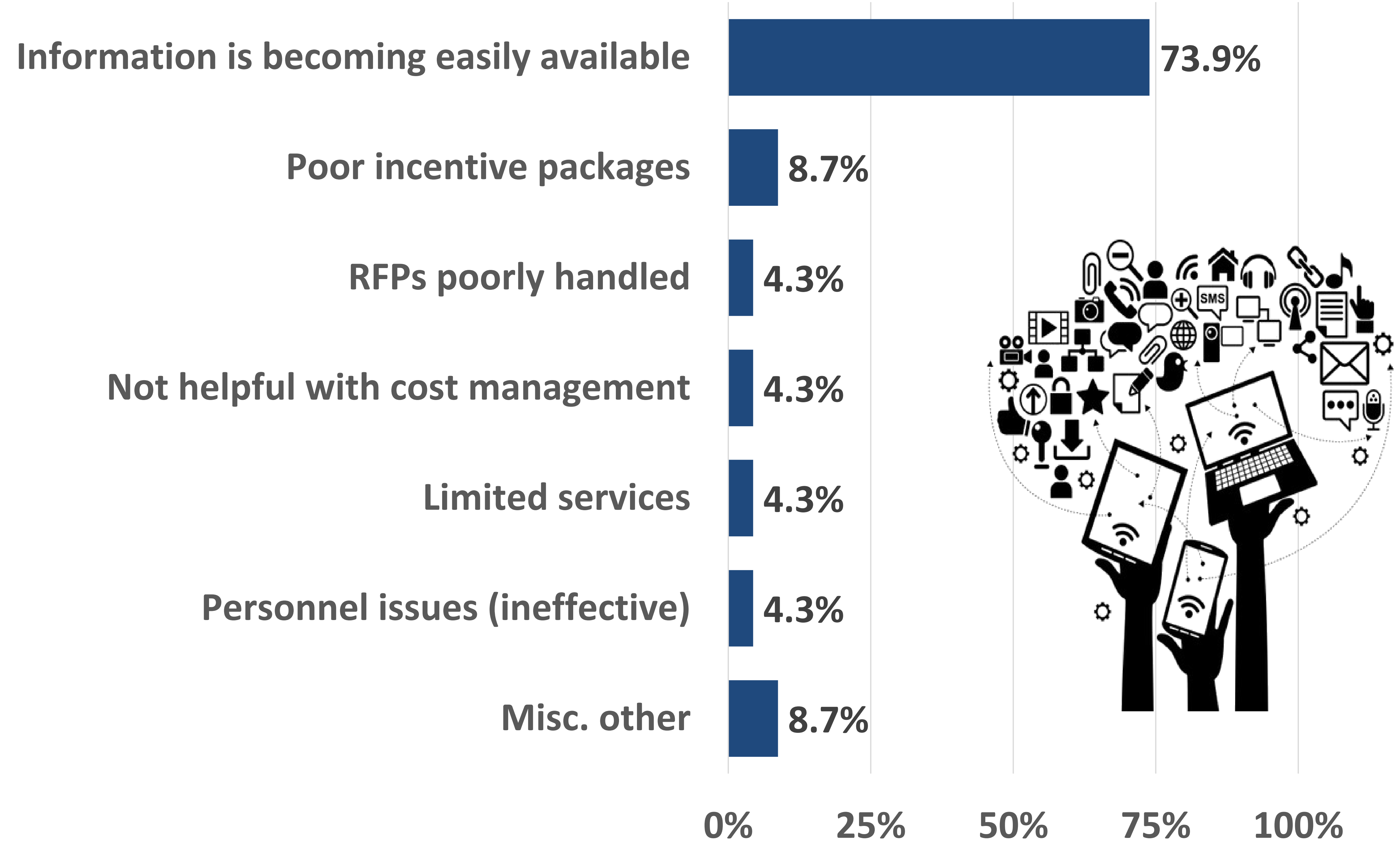


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Much more important	16.1%	17.9%	15.4%	15.8%	28.4%
More important	27.3%	35.1%	30.8%	28.8%	17.6%
Neither more nor less important	51.8%	42.4%	46.2%	50.5%	50.0%
Less important	4.2%	4.6%	7.7%	4.4%	4.1%
Much less important	0.6%	0.0%	0.0%	0.5%	0.0%

In terms of their overall importance to the meetings industry, are DMOs/CVBs becoming more or less important?
Base: 569 Completed Surveys

Why DMOs Are Becoming Less Important

For those that feel DMOs are becoming less important, the increasing ease of accessing information was the top reason for this opinion. DMOs are seen as the gatekeepers of information. This perception that the value of DMOs lies chiefly in providing information that others lack access to – is thus seen by some planners as a threatened because access to such information is becoming increasingly easier.

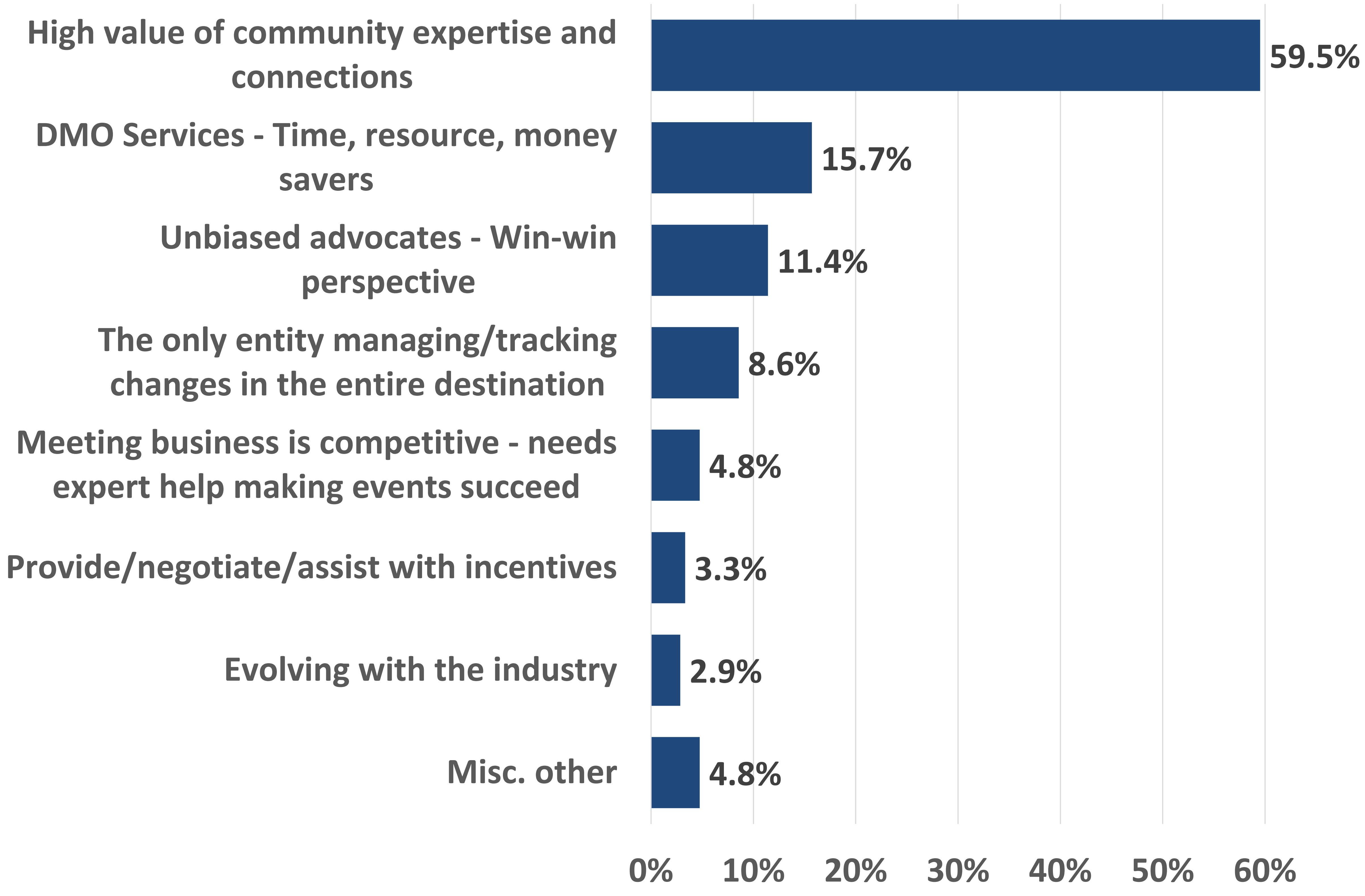


	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Information is becoming easily available	91.7%	40.0%	50.0%	78.6%	100.0%
Poor incentive packages	8.3%	0.0%	50.0%	14.3%	0.0%
RFPs poorly handled	0.0%	20.0%	0.0%	0.0%	0.0%
Not helpful with cost management	8.3%	0.0%	0.0%	7.1%	0.0%
Limited services	8.3%	0.0%	0.0%	0.0%	0.0%
Personnel issues (ineffective)	0.0%	0.0%	0.0%	0.0%	0.0%
Misc. other	0.0%	40.0%	0.0%	7.1%	0.0%

Why are DMOs/CVBs becoming less important to the meetings industry? Base: 210 Completed Surveys

Why DMOs Are Becoming More Important

For those that felt DMOs are becoming more important, this sentiment was largely related to the strong value they placed on DMOs' expertise and connections, which eases some of their professional responsibilities in an ever harried environment (59.5%).



	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
High value of community expertise and connections	59.5%	61.5%	37.5%	61.6%	48.1%
DMO Services - Time, resource, money savers	18.0%	10.8%	12.5%	13.0%	14.8%
Unbiased advocates – Win-win perspective	15.3%	9.2%	0.0%	10.9%	14.8%
The only entity managing/ tracking changes in the entire destination	8.1%	7.7%	25.0%	7.2%	11.1%
Meeting business is competitive – needs expert help making events succeed	3.6%	4.6%	12.5%	4.3%	11.1%
Provide/negotiate/assist with incentives	2.7%	4.6%	0.0%	4.3%	0.0%
Evolving with the industry	2.7%	4.6%	0.0%	3.6%	7.4%
Other	3.6%	4.6%	12.5%	5.1%	0.0%

Why are DMOs/CVBs becoming more important to the meetings industry? Base: 210 Completed Surveys

What They Say…

With changes in hotels (mergers, closures, new openings) happening quickly, DMOs/CVBs can keep better track of things in their cities. Similarly, cities are changing and developing new attractions all the time, and we can't keep up if we are not there.

Planner are inundated with too much information. DMO/CVB help cut through the clutter.

As options grow, these organizations help us wade through all the information and offer insights we couldn't get easily.

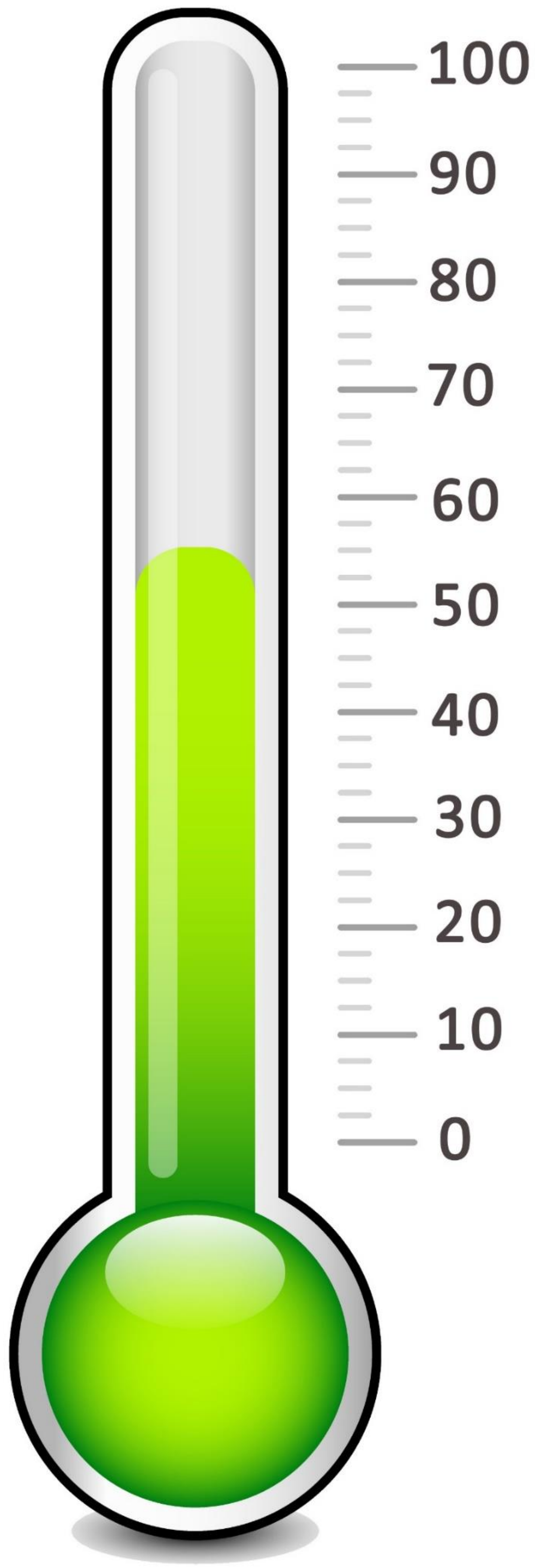
I cannot stress the importance. I can't imagine our industry without them. As information overload and the level of 'noise' increases -- their ability to cut through the clutter and advocate for us, inform us, provide support is essential to a citywide convention.

We are all competing for the same attendee dollar. We need to work harder than ever to market the destination as well as the education program and expo experience. Attendees want to go someplace where they can have fun in addition to learning. The CVBs are the best resource out there for providing support to meeting planners.

One stop shop amid information overload

With international meetings becoming more popular and/or new locations being selected, it's impossible to keep up with all the in's and out's of every city nationwide. I need assistance to know what's new, what's old and what's trending in their cities that only a native would know.

DMO - Meeting Planner Engagement Index™ Overview



An index was created to benchmark and track how engaged meeting planners are with DMOs

This is a composite index based on the results of these three survey questions, equally weighted:

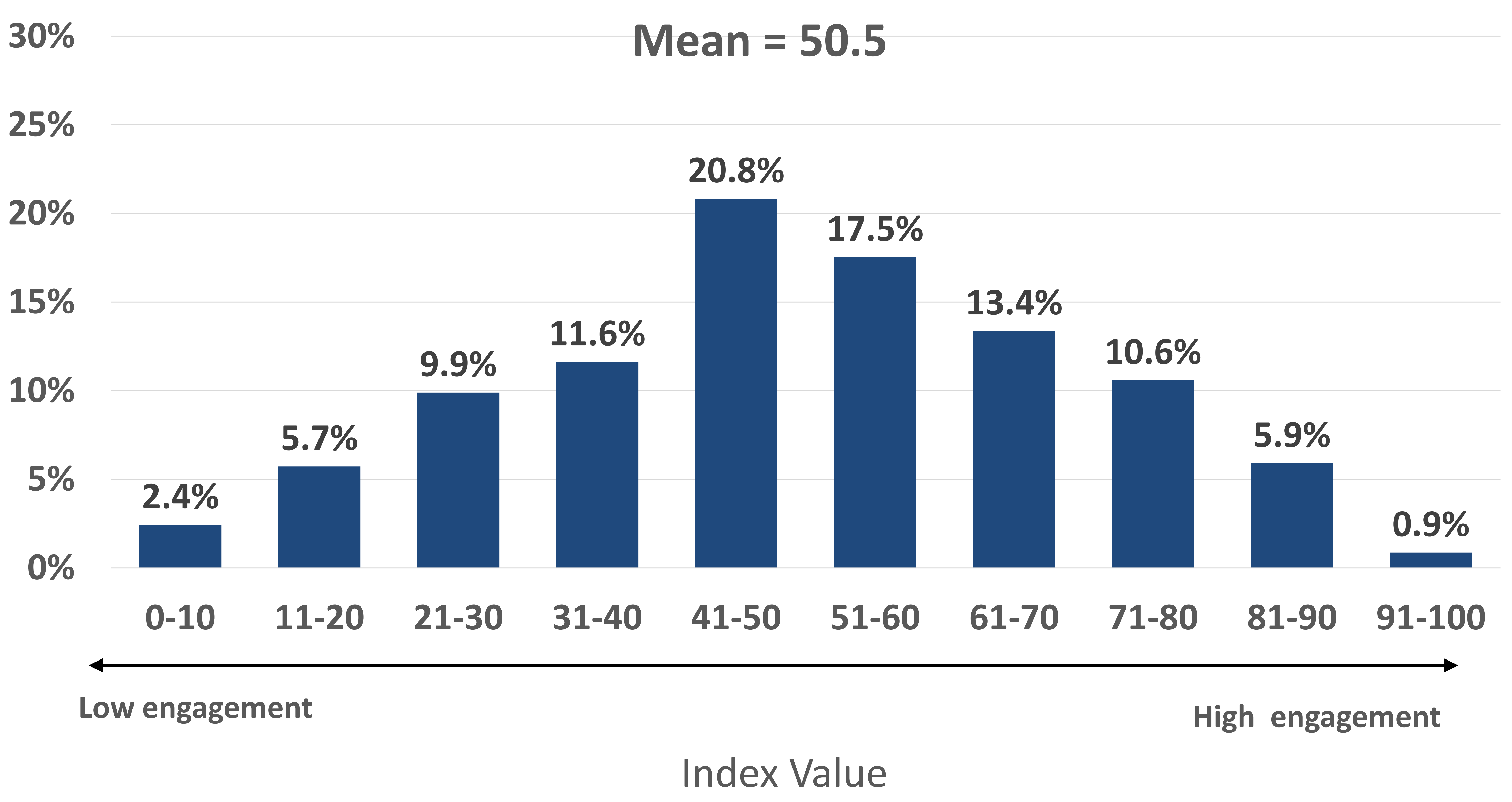
- DMO Resources Typically Used
- # of DMOs Used
- Importance of DMOs to Meeting Planning

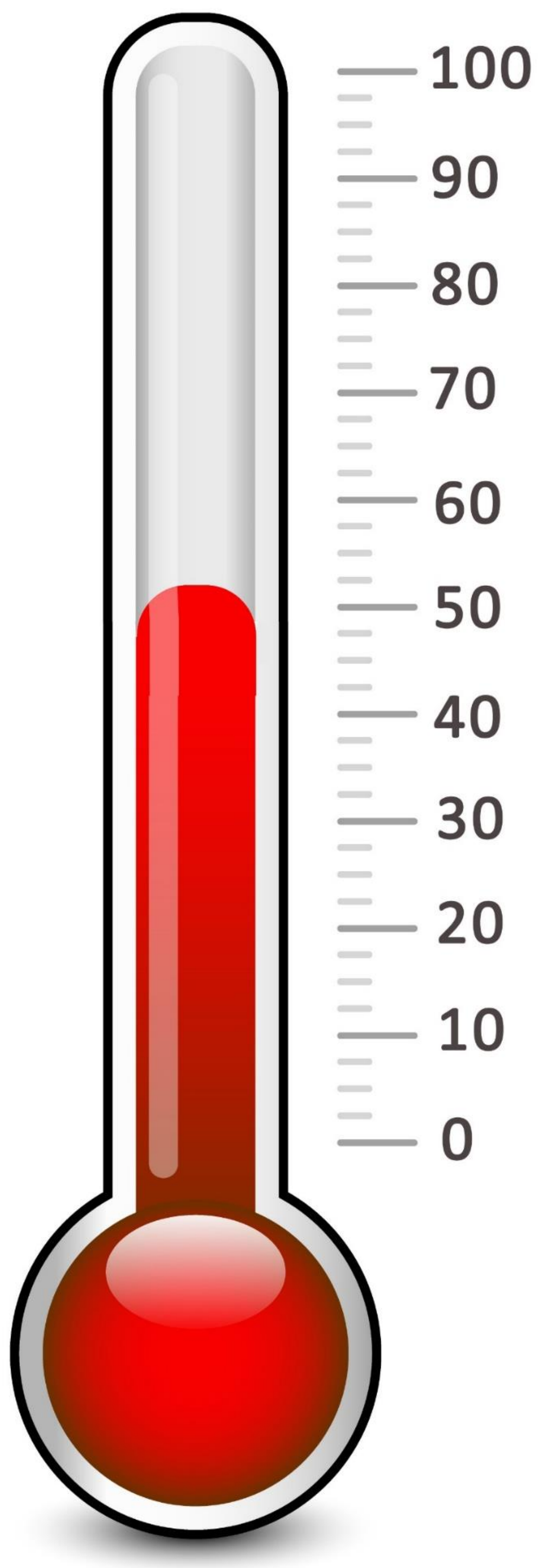
These values are then assigned on a 100-point scale:

- 100 = Fully Engaged
- 0 = Completely Disengaged

DMO - Meeting Planner Engagement Index ™ Overall Score (All Planners)

Across all planner types, the mean engagement score is 50.5 on the 100-point scale.





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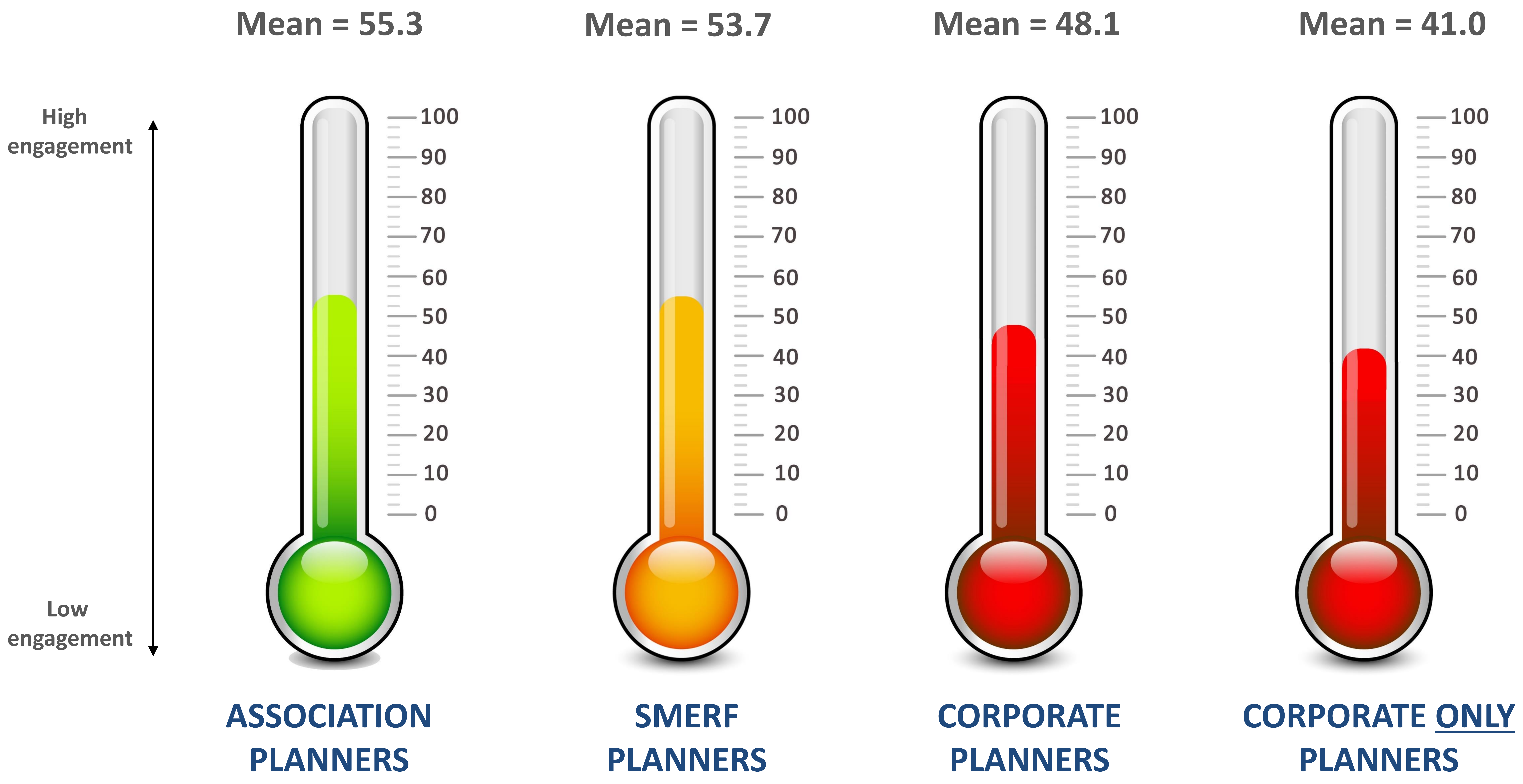
DMO - Meeting Planner Engagement Index™

Association planners currently have the highest engagement with DMOs and corporate planners the lowest.

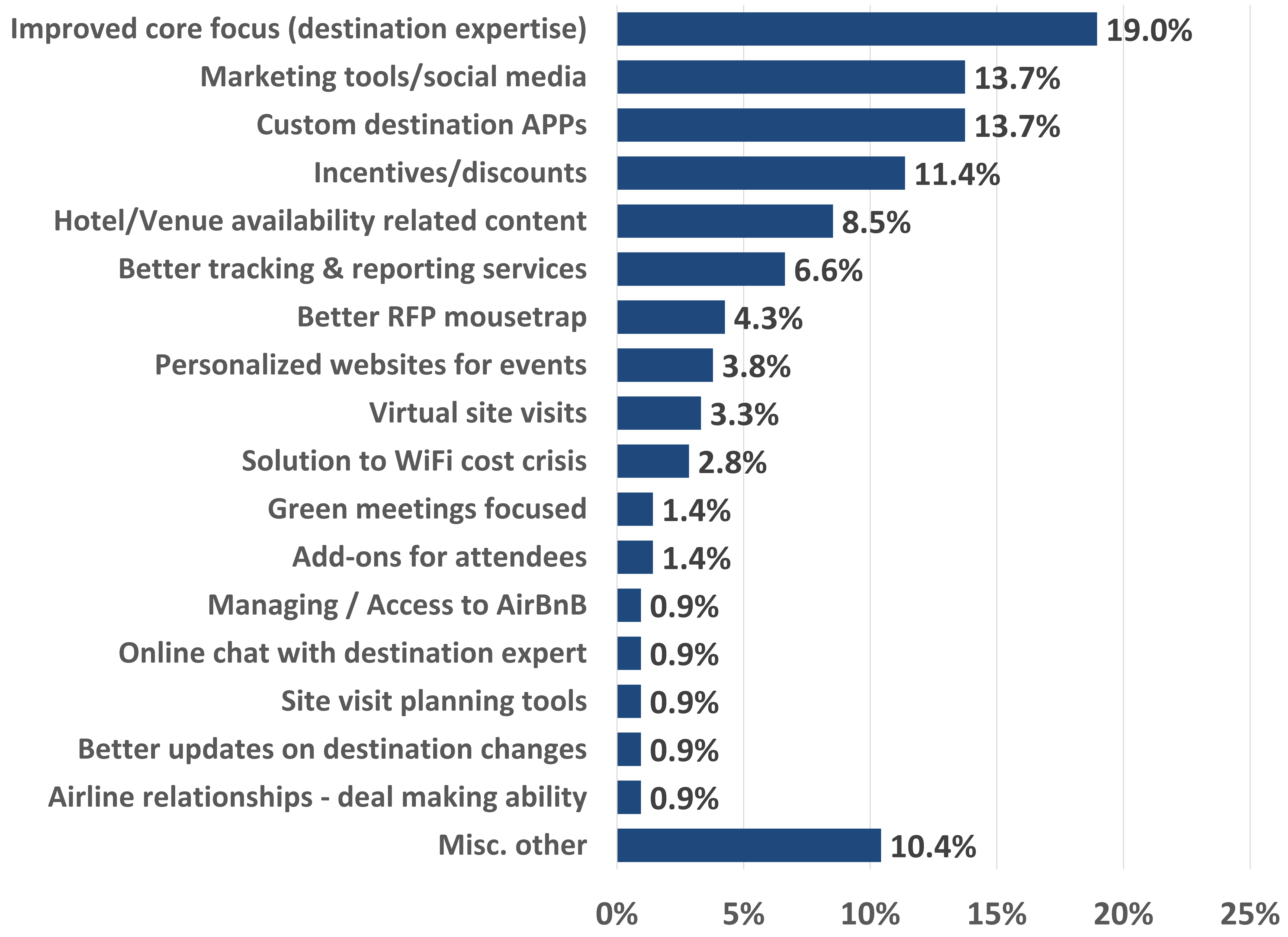


Innovation

This section of the report looks at meeting planners' opinions on potential innovations DMOs can lead in order to increase their value in the meetings process

Single Most Valuable DMO Innovation

Meeting planners were asked to think about innovation in the meetings market and to name or describe the single most valuable new service DMOs could provide meeting planners. **Rather than a technical , nearly one in five meeting planners responded that DMOs can innovate by continuing to improve on their core focus: destination expertise. Nevertheless, many of the specific suggestions centered on attendance building and attendee experience tools, including destination apps and social media programs.**



	CORP.	3RD PARTY	ASSOC.	SELF CONT.	CITYWIDE
Improved core focus (destination expertise)	21.9%	17.5%	0.0%	21.2%	21.4%
Marketing tools/social media	13.2%	14.3%	22.2%	15.1%	17.9%
Custom destination APPs	14.9%	11.1%	11.1%	13.7%	17.9%
Incentives/discounts	8.8%	9.5%	22.2%	11.0%	3.6%
Hotel/Venue availability related content	8.8%	6.3%	11.1%	7.5%	3.6%
Better tracking & reporting services	8.8%	3.2%	11.1%	6.2%	21.4%
Better RFP mousetrap	2.6%	7.9%	11.1%	4.8%	3.6%
Personalized website for events	4.4%	4.8%	0.0%	2.7%	3.6%
Virtual site visits	3.5%	3.2%	0.0%	2.7%	3.6%
Solution to WiFi cost crisis	4.4%	1.6%	0.0%	2.7%	0.0%
Green meetings focused	0.0%	4.8%	0.0%	1.4%	0.0%
Add-ons for attendees	0.9%	1.6%	11.1%	0.7%	0.0%
Managing / Access to Airbnb	0.9%	1.6%	0.0%	1.4%	0.0%
Online chat with destination expert	0.0%	1.6%	0.0%	0.7%	3.6%
Site visit planning tools	0.9%	0.0%	0.0%	0.7%	3.6%
Better updates on destination changes	0.0%	3.2%	0.0%	0.7%	3.6%
Airline relationships - deal making ability	0.9%	0.0%	0.0%	0.0%	0.0%
Misc. other	9.6%	14.3%	11.1%	12.3%	3.6%

Please think about innovation in the meetings market. What would be the single most valuable new service DMOs/CVBs could provide to meeting planners like yourself? Base: 569 Completed Surveys

What They Say…

Move away from microsites to digital apps that are customized to your events.

A citywide app. Maybe with discounts, calendar items, interesting things happening in the city (even smaller, more local events), perhaps even walking tours.

Mobile app with local discounts.

Customized app that allows for RFP distribution.

What They Say…

- *Virtual tours, site visits and/or FAMs*
- *Assistance with social media to market the event*
- *RFP tracking system*
- *Access to destination-specific speakers*
- *Knowledge about livestream capabilities at local venues*

The 2018 Edition of
The DMO and the Future of the Meetings Industry Study
Report of Findings will be available in Spring 2018.

For more information and to sign up your destination to be tracked in this research, please go to
DestinationAnalysts.com/research/meetings