

# 2016 SURVEY OF MEETING PLANNERS

**Executive Summary of Findings**  
Prepared Exclusively for Survey Respondents

Based on responses from 856 Meeting Professionals on U.S. and Canadian Destinations



WATKINS RESEARCH GROUP

*Business Development Opportunities Research about Leading North American Convention Bureaus*

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TABLE OF CONTENTS

INTRODUCTION..... 1

MOST RECOMMENDED CITIES ..... 2

RESPONDENT CHARACTERISTICS..... 3

PEAK NIGHT ROOMS ..... 4

EXHIBIT SPACE ..... 5

TURNOUT ..... 6

HOW CVBS HELP IMPROVE ATTENDANCE..... 7

IMPORTANT ATTRIBUTES USED TO EVALUATE DESTINATIONS ..... 8

QUICK REFERENCE - TOP CITIES ..... 9

TOP CITIES ACCORDING TO < 1000 PEAK ROOM NIGHTS GROUP ..... 10

CITIES ON THE MOVE..... 11

OTHER ATTRIBUTES CONSIDERED ..... 12

WHICH CVBS/ DMOS STAND OUT?..... 13

MOST IMPRESSIVE PRACTICES OF OUTSTANDING CVBS/DMOS..... 14

IMPORTANT THEMES - THEN AND NOW ..... 15

ANYTHING ELSE YOU WOULD LIKE TO ADD?..... 17

This *Executive Summary of Findings* is produced specifically for the use of survey respondents in appreciation for their continued commitment to this primary research. The findings also coach Convention Bureaus and DMOs on how to best stay abreast of changing needs.

## INTRODUCTION

The “conversation” continues between meeting planners and the highest levels of management in convention bureaus. This is the 11<sup>th</sup> edition of the **Watkins Research Group Meeting and Convention Planners Survey**. It is a biennial study of perceptions about cities, bureaus and important industry topics by meeting planners.

**This year 856 meeting professionals throughout the U.S. and Canada participated.** All interviews were completed in December 2015 thru mid-February 2016. The response rate was 24.7%. The overall results of the study are accurate to within a maximum of ±2.9% at a 95% level of confidence.

These destinations were evaluated:

- |               |                  |                    |
|---------------|------------------|--------------------|
| 1. Anaheim    | 15. Indianapolis | 29. Phoenix        |
| 2. Atlanta    | 16. Kansas City  | 30. Pittsburgh     |
| 3. Austin     | 17. Las Vegas    | 31. Portland       |
| 4. Baltimore  | 18. Los Angeles  | 32. Salt Lake City |
| 5. Boston     | 19. Louisville   | 33. San Antonio    |
| 6. Charlotte  | 20. Miami        | 34. San Diego      |
| 7. Chicago    | 21. Milwaukee    | 35. San Francisco  |
| 8. Cincinnati | 22. Minneapolis  | 36. Seattle        |
| 9. Cleveland  | 23. Montreal     | 37. St. Louis      |
| 10. Columbus  | 24. Nashville    | 38. Toronto        |
| 11. Dallas    | 25. New Orleans  | 39. Vancouver      |
| 12. Denver    | 26. New York     | 40. Washington, DC |
| 13. Detroit   | 27. Orlando      |                    |
| 14. Houston   | 28. Philadelphia |                    |

Thank you again for adding to the collective wisdom!

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 June 2016

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## MOST RECOMMENDED CITIES

## Top 12 Client Advocate Score™<sup>1</sup>

An organization's Client Advocate Score™ (CAS) is an indication of whether or not an organization's clients are advocating the organization to colleagues and peers.

Planners are asked:  
**On a scale of 0 to 10, where  
 0 = "not at all likely" and  
 10 = "extremely likely,"  
 how likely are you to  
 recommend these cities to a  
 business associate or  
 colleague?**

The best Client Advocate Scores™ (right) are an indication that these destinations are widely recommended by meeting planners.

### #1 Vancouver

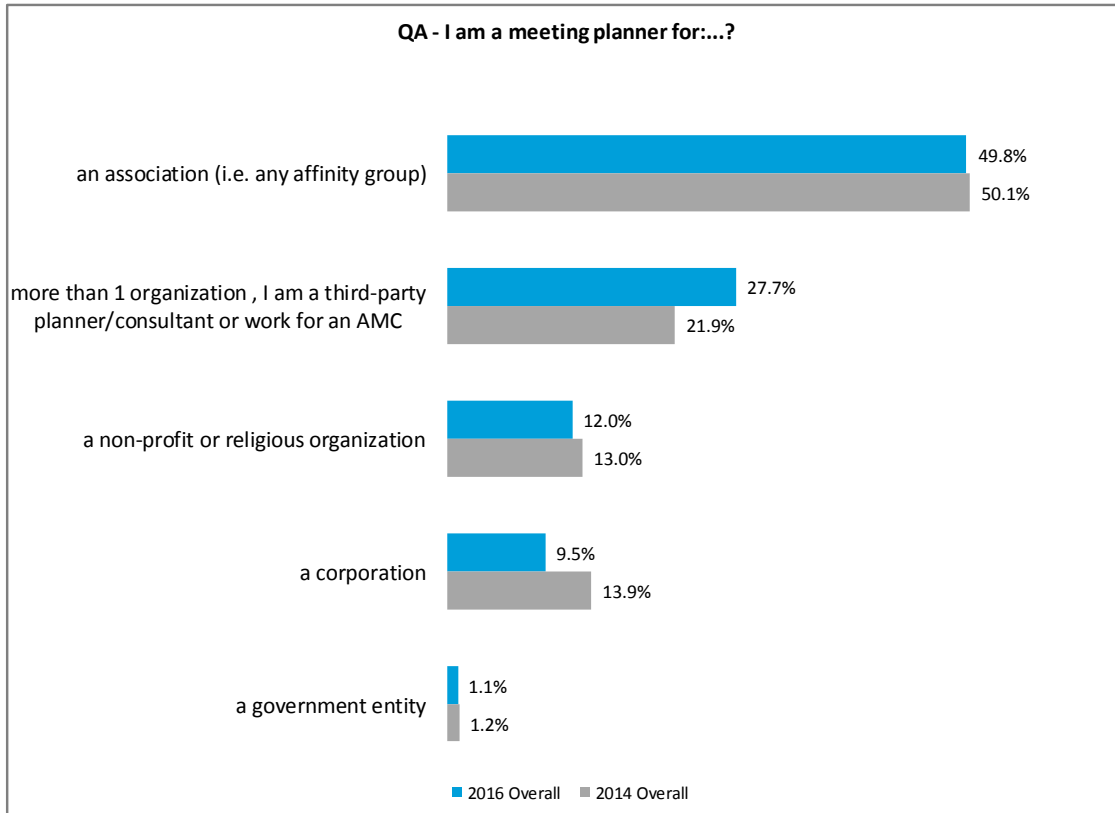
#2-12 in alphabetical order:

- Austin
- Boston
- Cleveland
- Louisville
- Montreal
- Nashville
- Portland
- San Antonio
- San Diego
- Seattle
- Toronto

<sup>1</sup> Client Advocate Score™ (CAS) is a trademark of Flaspöhler Research Group.

## RESPONDENT CHARACTERISTICS

About half of all survey respondents represent associations or other affinity groups. Just over one-quarter represent multiple, diverse organizations and could be termed “consultants.” The remaining one-quarter represent non-profits, corporations or government entities.



**Other bites:**

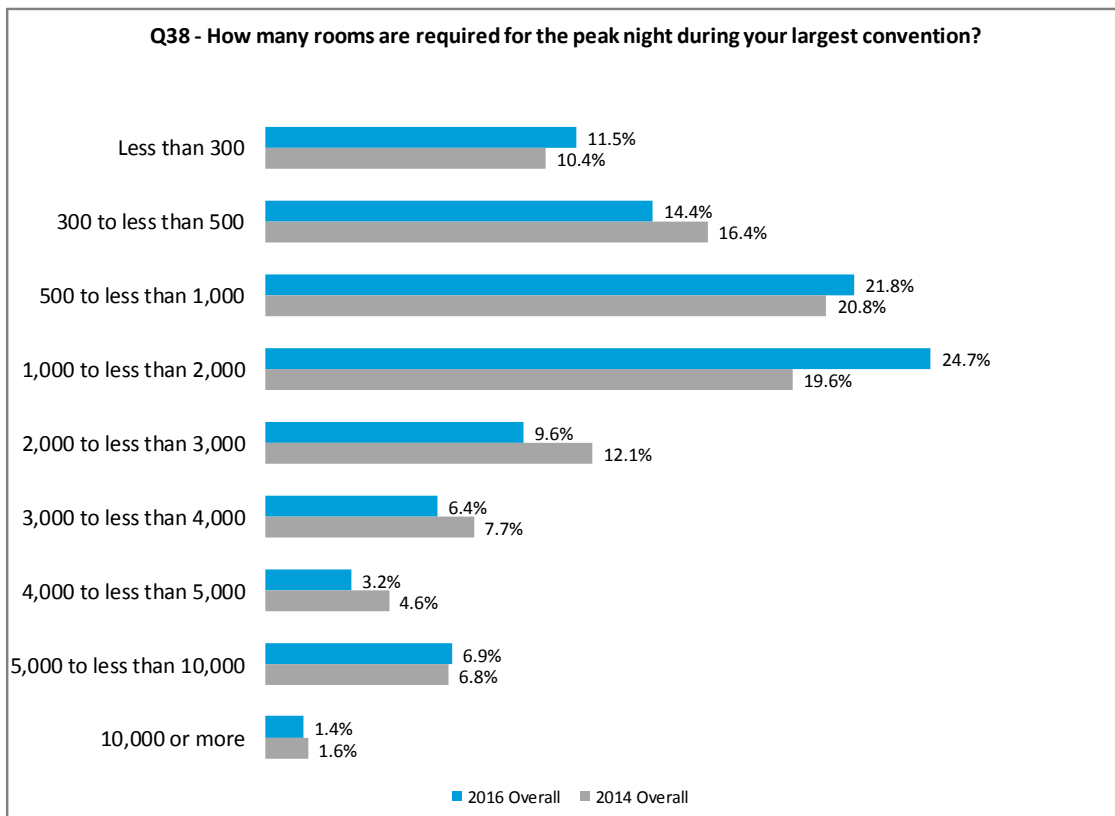
- 70.3% have been a professional meeting planner for 10 years or more.
- 59.2% indicate that meetings and conventions are a major source of income for their organization.
- 41.0% do not think of Canada as “out of country” to the same degree as other foreign destinations.

## PEAK NIGHT ROOMS

Not every meeting is the same size. While this study focuses on “larger” meetings, there is still a wide variation within the base of respondents who are represented in these results.

For the first time this year, we took a deeper look into how meeting planners’ perceptions and preferences vary according to meeting size.

To determine “size” we used the results of question #38 (shown below):



We then split the responses above into two categories:

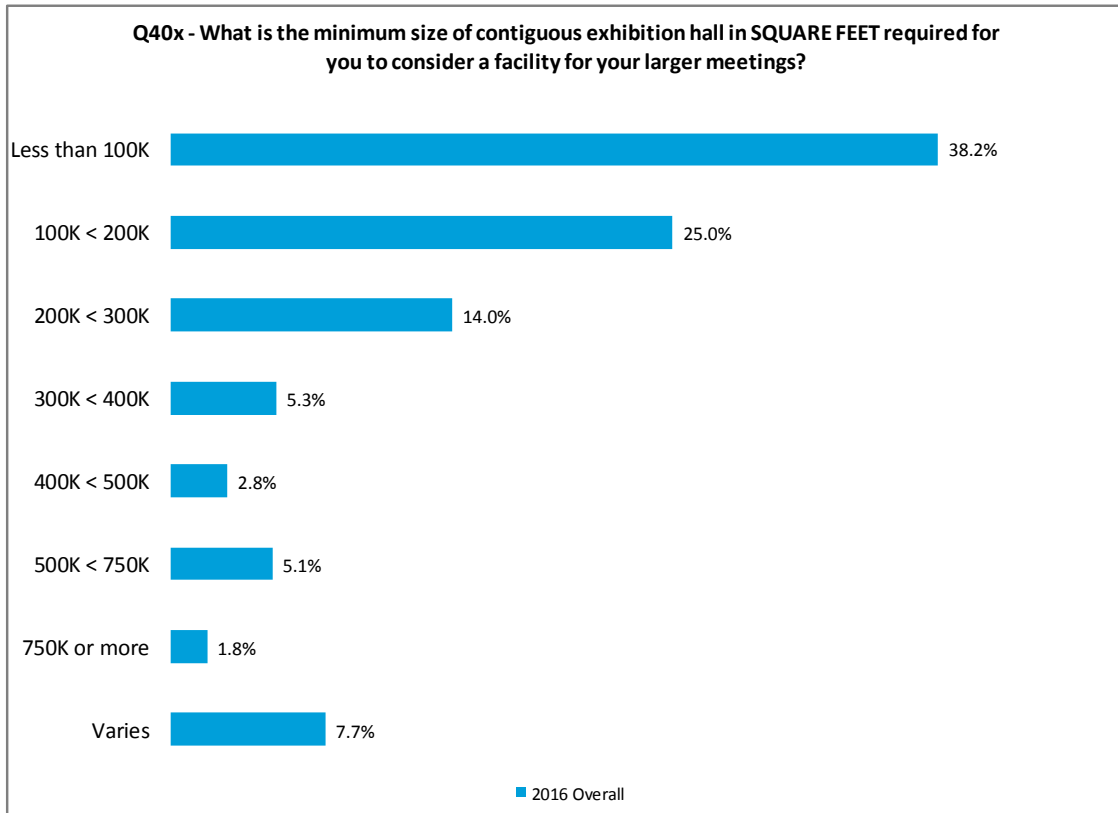
- (1) those requiring less than 1000 peak night rooms (about 47.8%)
- (2) those requiring 1000 or more peak night rooms (about 52.2%)

***Other bites:***

- 36.8% indicate that their largest convention lasts 4 nights.

## EXHIBIT SPACE

Another indication of meeting size is the amount of exhibit space required. Admittedly, not all types of meetings utilize significant exhibit space. For those that do, about 40% require less than 100K contiguous square feet.



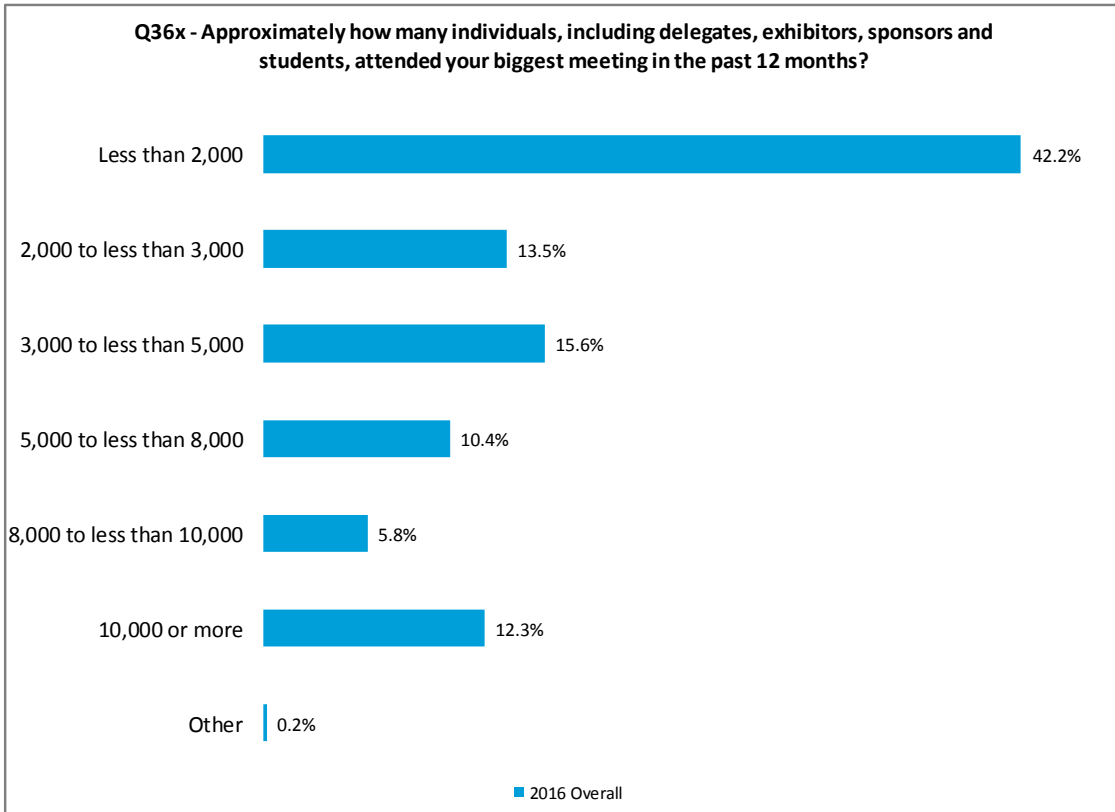
### *Other bites:*

- 32.6% use the city convention center for every meeting/convention.
- 25.2% use the center “most of the time, but not every time.”
- 14.5% never use the center.

## TURNOUT

While number of rooms and exhibit space required certainly give a sense of meeting size, attendee turnout is the ultimate size metric.

More than half said that their largest meetings are attended by 2,000 or more individuals.



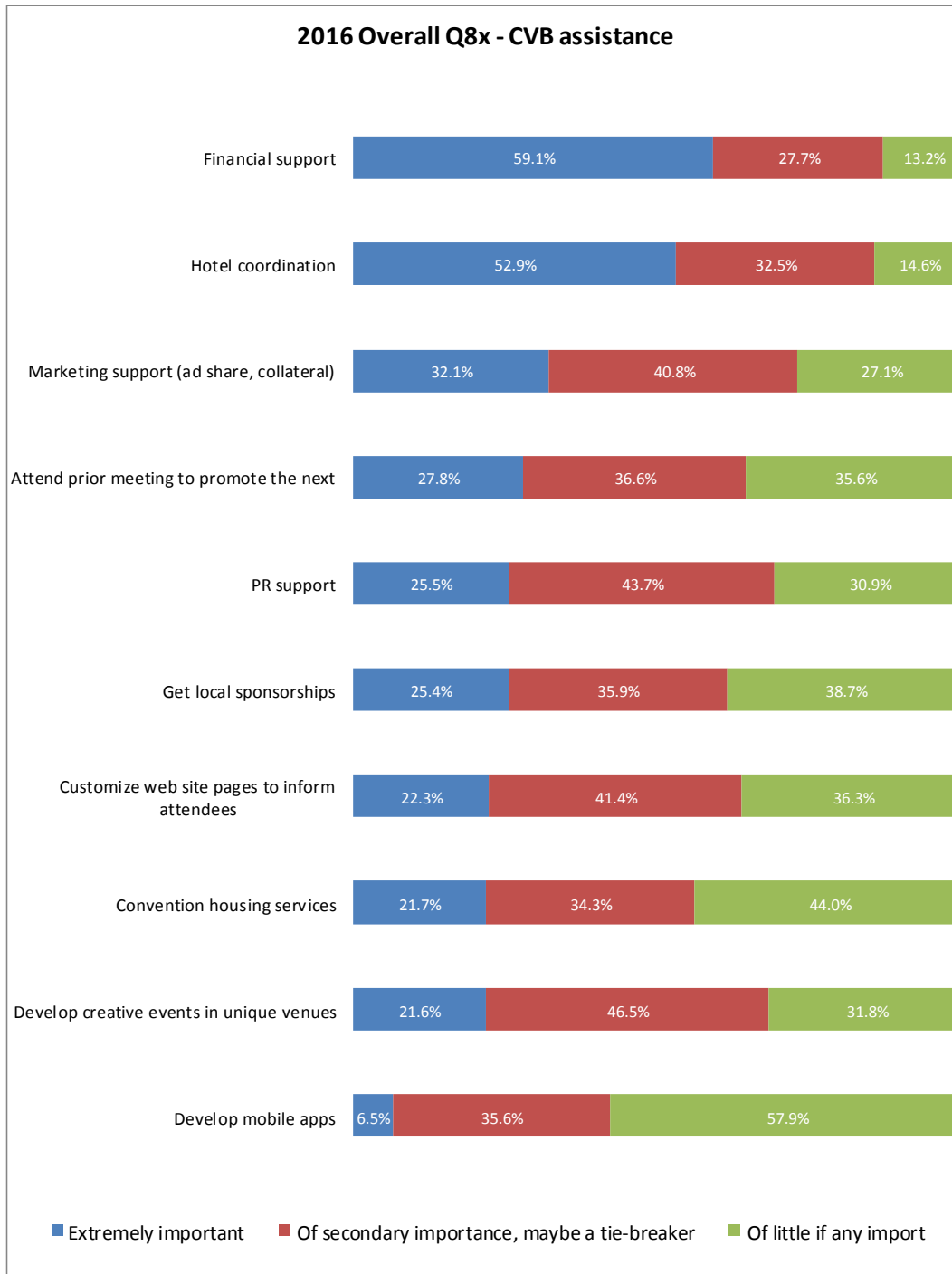
### ***Other bites:***

- 47.2% say attendance levels will not change over the next two years.
- 46.4% estimate an average 9.2% increase in attendance at all of their meetings through 2017.
- 6.3% project a 10.6% decline in attendance through the same time period.



## HOW CVBS HELP IMPROVE ATTENDANCE

CVBs/DMOs are instrumental in stimulating large meeting attendance. This year, we asked planners not only what support is important to them, but how important is it?



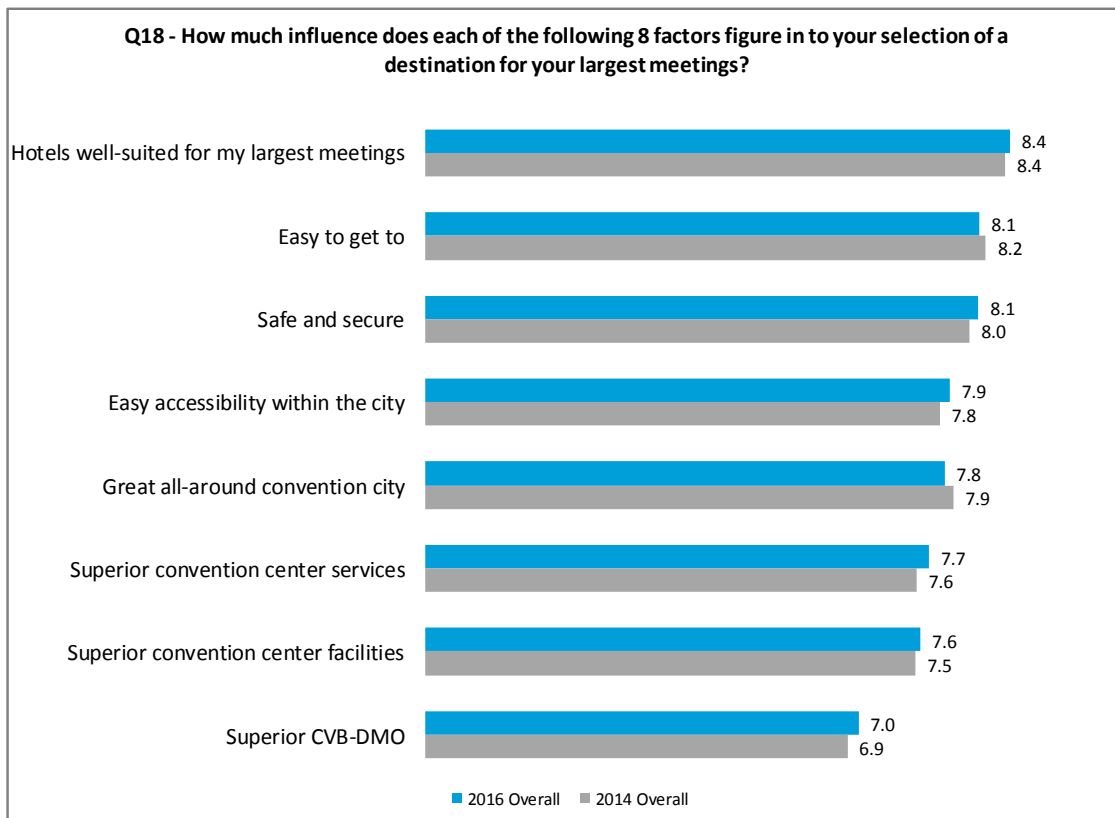
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## IMPORTANT ATTRIBUTES USED TO EVALUATE DESTINATIONS

These factors are shown to be the key attributes in evaluating, differentiating and thereby selecting one destination over others.

The factors themselves have remained relatively consistent through the years but the order of importance has changed. For example, the attribute “Safe and Secure” moved from 5th in 2012 to 3rd in the current study.



Scale: 1 (not important) - 9 (very important)

### Other bites:

- “Site Inspections” and “My Peers” are the most influential sources of information about destinations.

## QUICK REFERENCE - TOP CITIES

How cities rank for big meetings based on what planners say is most important in their evaluation and selection process.

Has a superior CVB/DMO	Has easy accessibility within the city	Has hotels well suited for my largest meetings	Has superior convention center facilities	Has superior convention center services	Is a great all around convention city	Is easy to get to	Is safe and secure
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### TOP HONORS

Vancouver	Washington, DC	San Diego	Nashville & Vancouver	Vancouver	San Diego	Atlanta	Vancouver
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*Next 11 for each attribute in alphabetical order:*

Austin	Boston	Austin	Anaheim	Austin	Austin	Chicago	Anaheim
Charlotte	Indianapolis	Chicago	Columbus	Charlotte	Boston	Boston	Austin
Indianapolis	Montreal	Indianapolis	Denver	Indianapolis	Chicago	Dallas	Indianapolis
Louisville	Nashville	Las Vegas	Indianapolis	Montreal	Montreal	Las Vegas	Montreal
Montreal	New York	New Orleans	Montreal	Nashville	Nashville	Los Angeles	Nashville
New Orleans	Philadelphia	Orlando	Orlando	New Orleans	New Orleans	New York	Orlando
Portland	San Diego	Philadelphia	Pittsburgh	Orlando	San Francisco	Orlando	Portland
Salt Lake City	San Francisco	San Francisco	San Diego	San Diego	Seattle	Philadelphia	Salt Lake City
San Diego	Seattle	Toronto	San Francisco	San Francisco	Toronto	San Diego	San Diego
Seattle	Toronto	Vancouver	Seattle	Seattle	Vancouver	San Francisco	Seattle
Toronto	Vancouver	Washington, DC	Washington, DC	Toronto	Washington, DC	Washington, DC	Toronto

### The Breadth and Depth of Excellence

*Cities appearing at least five times in this list of top destinations:*

Austin	Montreal	Orlando	San Francisco	Toronto	Washington, DC
Indianapolis	Nashville	San Diego	Seattle	Vancouver	

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## TOP CITIES ACCORDING TO < 1000 PEAK ROOM NIGHTS GROUP

Remember the analysis of rooms required on page 4? Here are the top rated destinations, as indicated by those requiring less than 1000 peak room nights.

### Top 12 < 1000 Peak Room Nights Ratings

These cities were rated the highest according to the composite score of all 8 evaluation attributes (see page 8).

#### #1 Vancouver

#2-12 in alphabetical order:

- Austin
- Boston
- Columbus
- Indianapolis
- Montreal
- Nashville
- Orlando
- San Diego
- Seattle
- Toronto
- Washington, DC

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## CITIES ON THE MOVE

## Top 12 Most Improved Attribute Scores

These cities made the greatest advances in composite attribute scores since the 2014 study. They are destinations that bear watching as they strategically maneuver to attain/retain the qualities of the overall experience that planners find the most appealing.

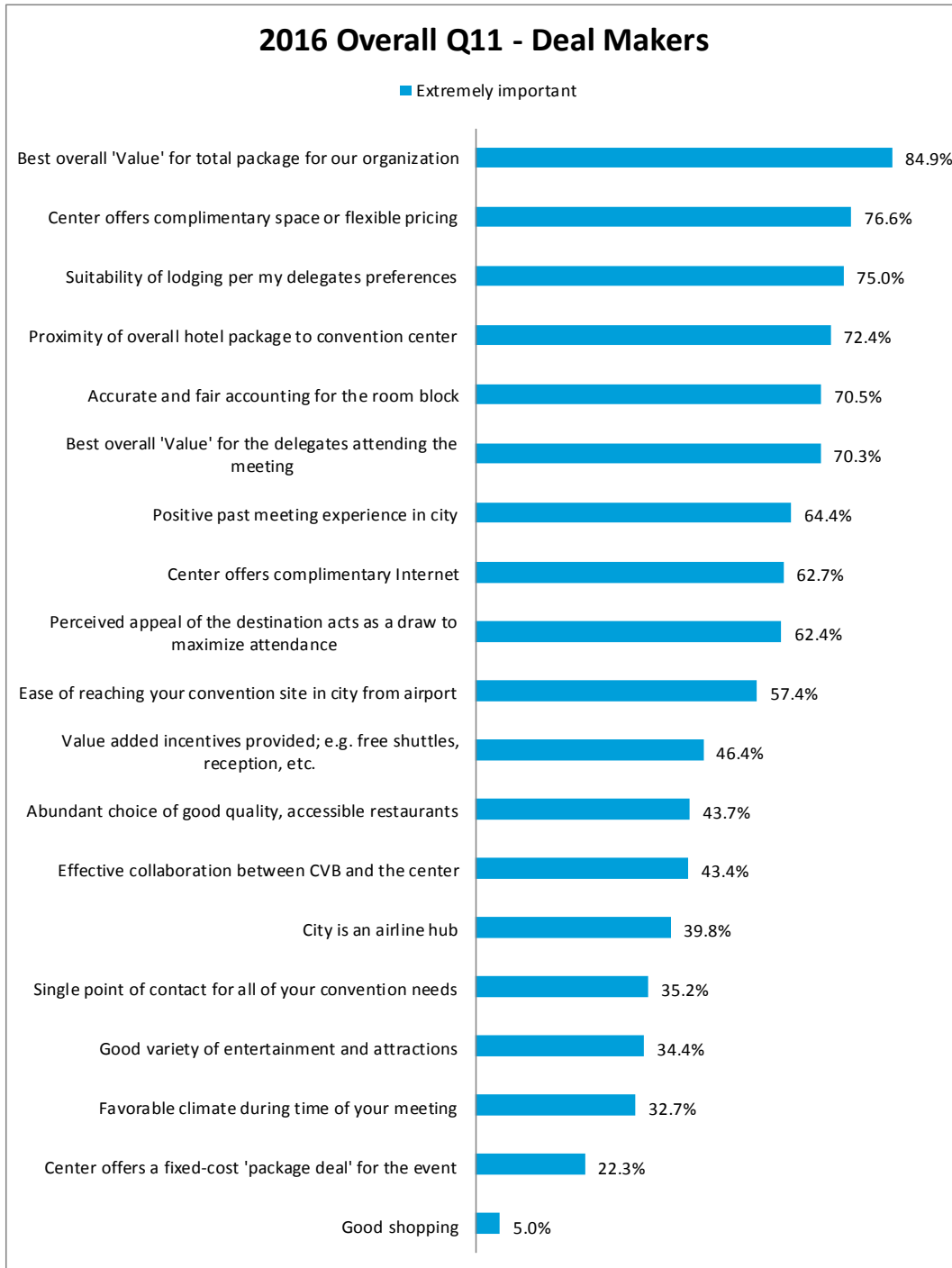
### #1 Pittsburgh

#2-12 in alphabetical order:

- Austin
- Cincinnati
- Cleveland
- Columbus
- Detroit
- Houston
- Indianapolis
- Miami
- Philadelphia
- Portland
- Salt Lake City

## OTHER ATTRIBUTES CONSIDERED

Complementing the 8 primary evaluation attributes (page 8), planners also rated these qualities on whether or not they are “extremely important.”



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## WHICH CVBS/ DMOs STAND OUT?

## Top 12 “Stand Out” CVBs/ DMOs

Planners identified these CVBs/ DMOs as “standing out” relative to the others.

Those that made the list last time are marked ✨.

\*13 total cities shown, due to ties.

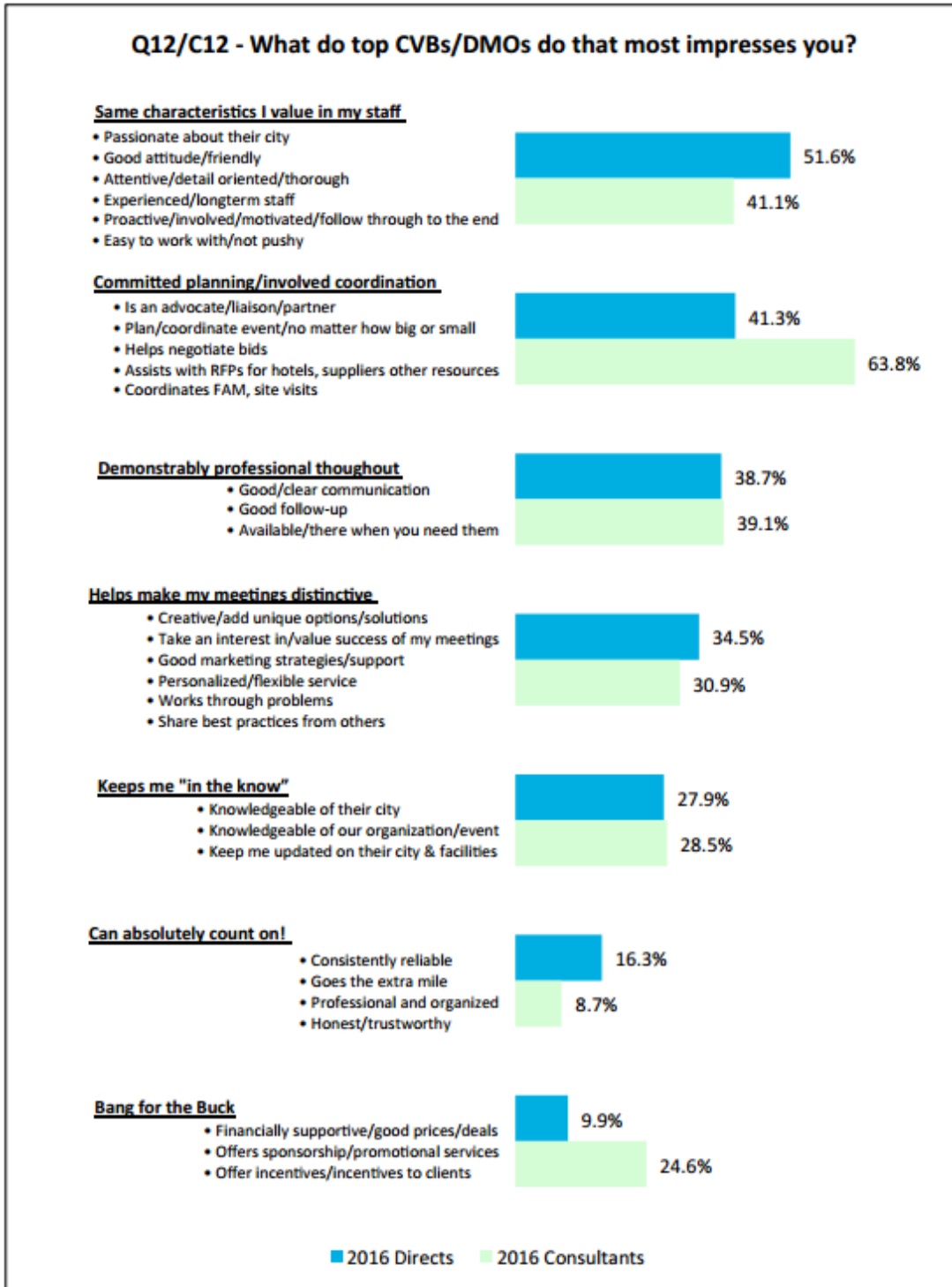
### #1 Louisville

#2-12 in alphabetical order:

- Baltimore
- Boston ✨
- Denver ✨
- Indianapolis ✨
- Montreal ✨
- Nashville
- Orlando ✨
- Pittsburgh
- San Antonio ✨
- San Diego ✨
- Toronto ✨
- Vancouver

## MOST IMPRESSIVE PRACTICES OF OUTSTANDING CVBS/DMOS

We asked both planners and consultants (separately) how the top CVBs/DMOs most impress them.



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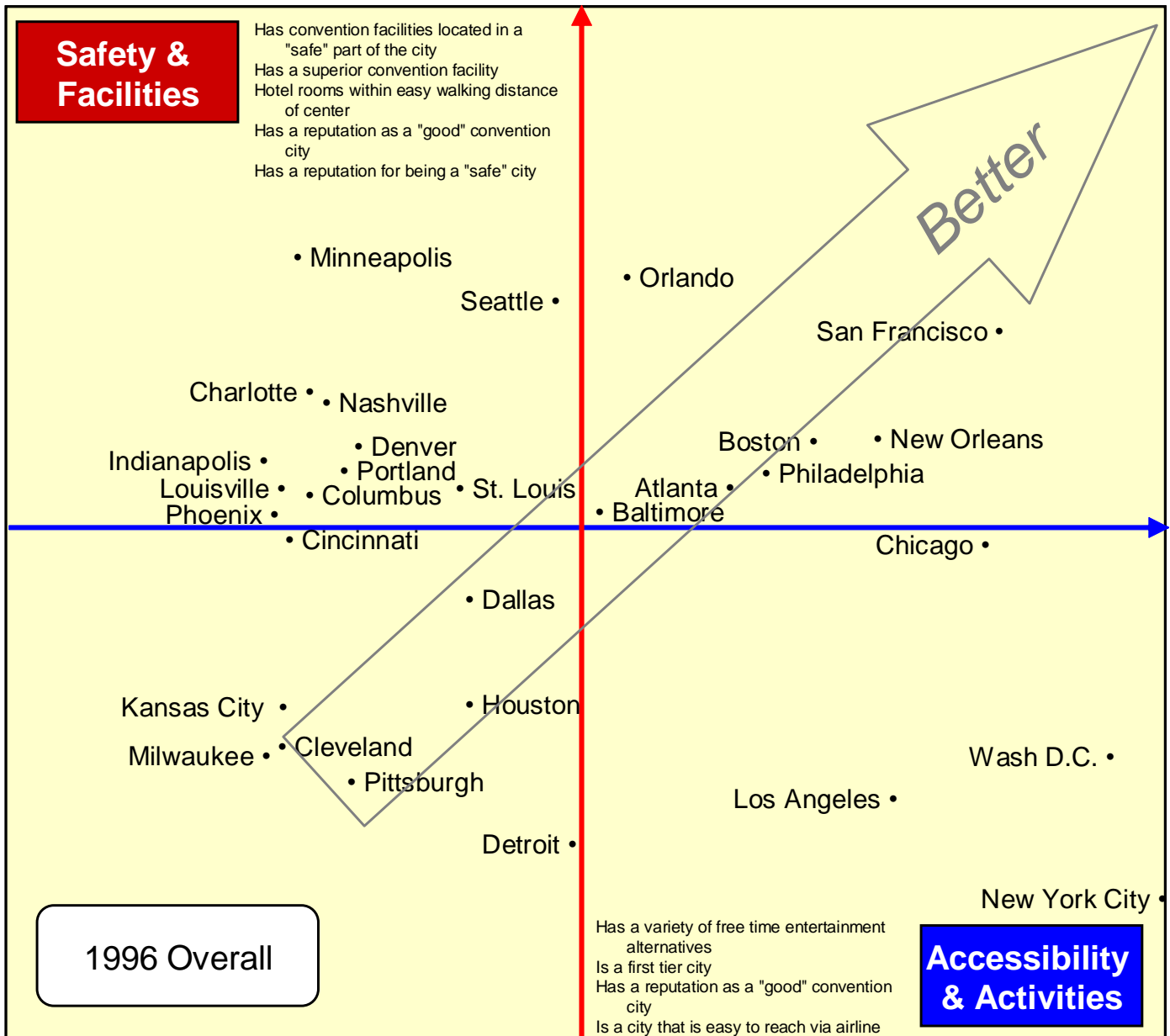
## IMPORTANT THEMES - THEN AND NOW

Back in **1996** the broad themes were:

**Accessibility & Activities** and **Safety & Facilities**

Primary

Secondary



Canadian destinations were not rated in 1996.

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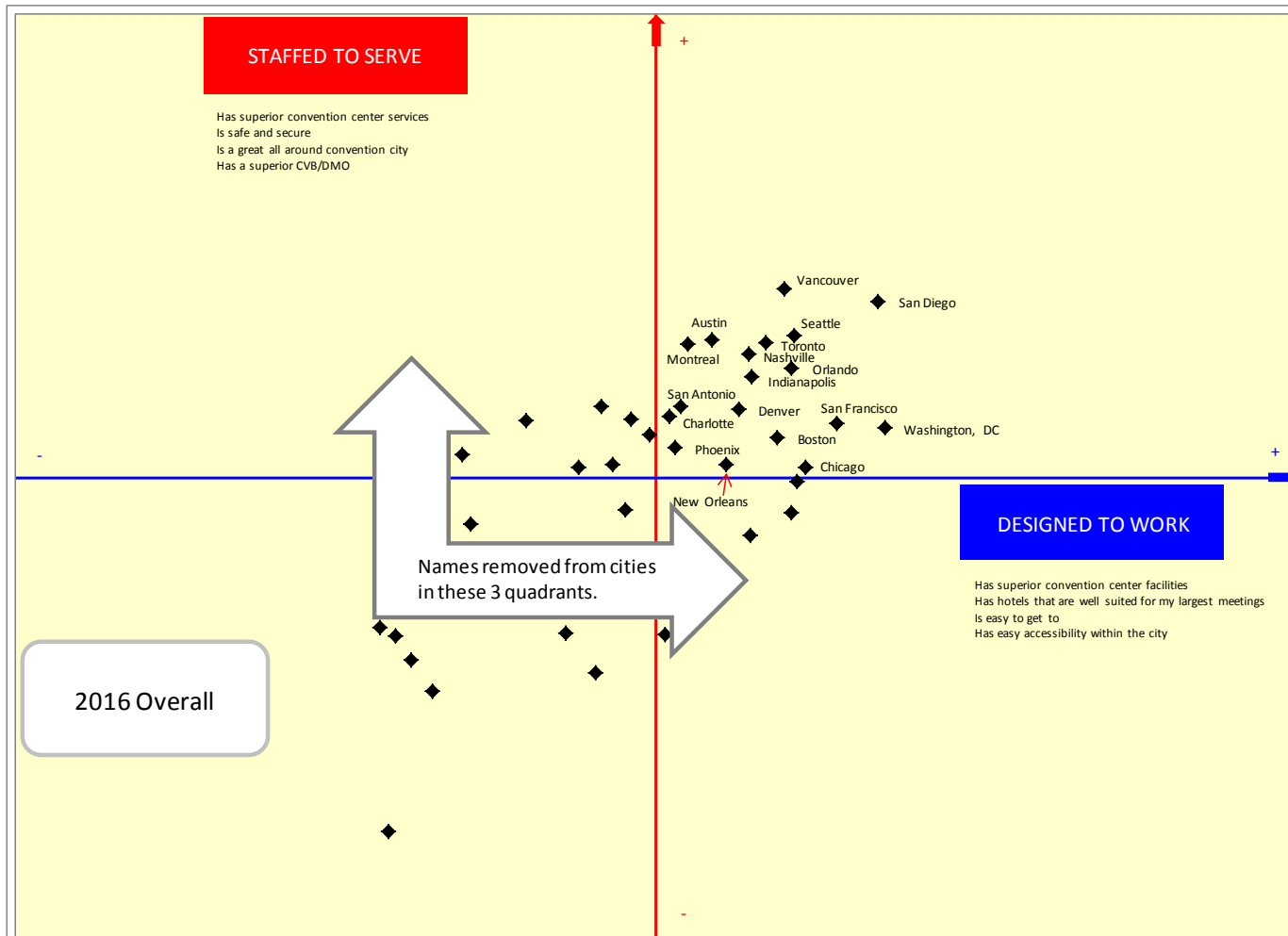
Today, in 2016 the broad themes have evolved to:

**Designed to Work** and **Staffed to Serve**

Primary

Secondary

This chart depicts the relative perception of cities for the 8 most important attributes in two dimensions - “relative” being how far they are from the average of all destinations combined. Therefore, cities near the center are perceived as average. “Better than average” is indicated by a position either toward the top (Staffed to Serve) or toward the right (Designed to Work).



These 18 cities were also evaluated and appear in other than the top right quadrant on this map:

- |               |                 |                    |
|---------------|-----------------|--------------------|
| 1. Anaheim    | 9. Houston      | 17. New York       |
| 2. Atlanta    | 10. Kansas City | 18. Philadelphia   |
| 3. Baltimore  | 11. Las Vegas   | 19. Pittsburgh     |
| 4. Cincinnati | 12. Los Angeles | 20. Portland       |
| 5. Cleveland  | 13. Louisville  | 21. Salt Lake City |
| 6. Columbus   | 14. Miami       | 22. St. Louis      |
| 7. Dallas     | 15. Milwaukee   |                    |
| 8. Detroit    | 16. Minneapolis |                    |

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## ANYTHING ELSE YOU WOULD LIKE TO ADD?

Planners and Consultants were given the opportunity to provide additional comments at the conclusion of the survey on any topic they wished. Here are some of the most noteworthy remarks.

“As many teams get smaller, the real key for a city to stand out is to find ways to help planners who are being asked to do more with fewer bodies. Offering a Passkey solution to manage housing for those without housing companies, meeting room set ups and diagrams, custom menus, great experiences for the attendees that tie to the SHOW, and not just the great nightlife.”

“Cohesiveness makes all the difference.”

“CVBs are extremely helpful when booking meetings, especially for smaller groups with limited budgets. These relationships are instrumental during the booking and planning process.”

“Great survey. Very thorough and made me pause and contemplate the various cities I've worked with over the years, as well as those I've toured and entered into negotiation. Amazing how many sites there truly are that we can consider, but finding that secret sauce, amenity or answer to our need is so rewarding. It comes down to an event/city that leaves a memorable mark on us AND our attendees. It is not just the cool restaurant where we ate in that city, but the entire package (customer service, vendor relations and partnerships, experience, professionalism, approachability, tourism highlights, ease of access/travel, takeaway memories). In the end, it's the partners all working together to garner the business.”

“I have been immensely pleased over the past years with the level of service I have received from CVB/DMO contacts I have worked with. I very much value relationships that I have established with these cities.”

“I hope this helps all of the cities listed.”

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**ANYTHING ELSE YOU WOULD LIKE TO ADD? (continued)**

“It was a good survey, it covered everything.”

“Some of the larger cities are riding a wave of business right now. Smaller meetings, loyal meetings to a city are being pushed aside to make way for larger one off pieces of business. A city and CVB that rewards groups for coming back and year after year will be rewarded at some point. Figuring out ways to keep a group in your rotation (rewarding them for doing so) would be a strategy worth investigating. We are looking into a "we want you back" campaign for attendees. Cities should do the same thing.”

“Thank you for the opportunity to participate -- love the forward thinking.”

“The question on whether we have eliminated cities based on political or social events. I checked that we have not. However, we have avoided (subtle difference from rejected) some cities -- or delayed signing-- because of social and political events. If our members -- whether because of race, ethnicity or sexual preference would not feel comfortable being in a city, we will avoid it.”

“We are a non-profit business association. Currently, we do limit the size of our events because our attendees like to be the big fish in a small pond. They want to be able to talk to other attendees with like concerns all the time while in the building. We have grown in attendance for the last 3 years and could probably go over that number, but "I only want to see others like me" and "I don't want to walk a mile from my room to the meeting space" is what is dictating the size at the moment. If I could find a property that answered those two concerns and grow a little I would be interested.”

“Well designed as always. Keep up the good work. Your clients must find your surveys of great value and the results ever-changing. Cheers!”

“Yow. I think you covered everything and more.”

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# THANK YOU!

*Thanks again for your professional dedication to being part of this long running conversation to improve meeting experiences for all.*

*Positive changes over the years of this study document the impact of your collective influence.*

*The conversation continues in 2017. Your participation assures you're getting the next report.*



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