



2013 Meeting Planners Study

Prepared by H²R Market Research | December 2013

Sample Specs

- WHO** Meeting planners who have booked with or inquired about booking in Springfield or Branson, Missouri
- WHEN** December 2013
- WHAT** Investigating the perceptions and openness to booking meetings in the Springfield and Branson, MO areas
- HOW** A total sample size of 170 meeting planners including 38 from Branson and 35 from Springfield with a maximum margin of error of +/- 7.5%

Key Message



Decision makers at the Springfield and Branson Convention & Visitor Bureaus seek to optimize their group meeting business by better understanding the needs and wants of meeting planners, and determining the best channels to utilize to connect with them.



The results of this study indicate that in addition to affordability and safety, convenience aspects, such as proximity and connected hotels, are mission critical. Reaching meeting planners effectively requires multiple channels used at different touch points, but it is people who are most responsible for influencing and closing sales.

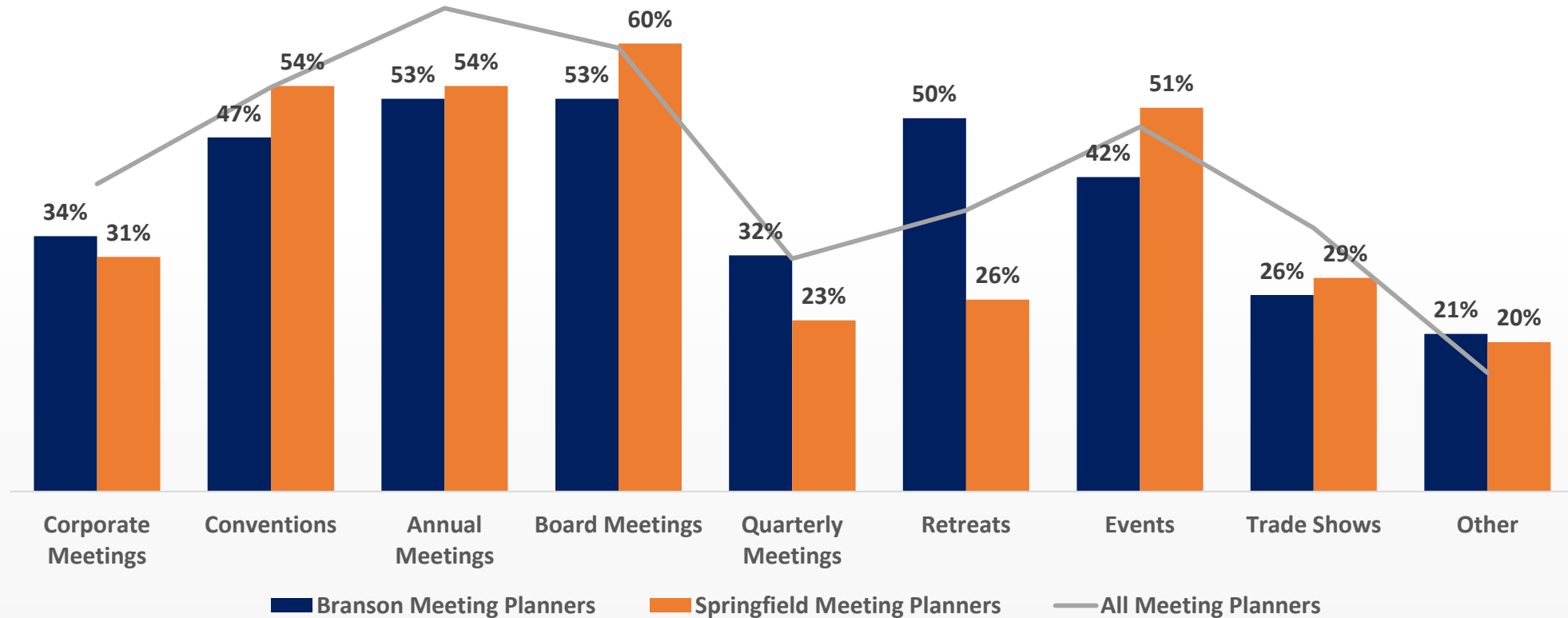


Neither destination competes particularly well in Missouri based upon meeting space. To grow market share among meeting planners both destinations would be wise to stress their individual differentiators (value for Springfield and variety/entertainment for Branson) and to leverage personal relationships and connections to influence and close sales.

Planning Landscape

Meeting planners who have booked meetings in Springfield and Branson are most likely to plan board meetings, annual meetings, conventions, events and retreats.

Types of Meetings Planned

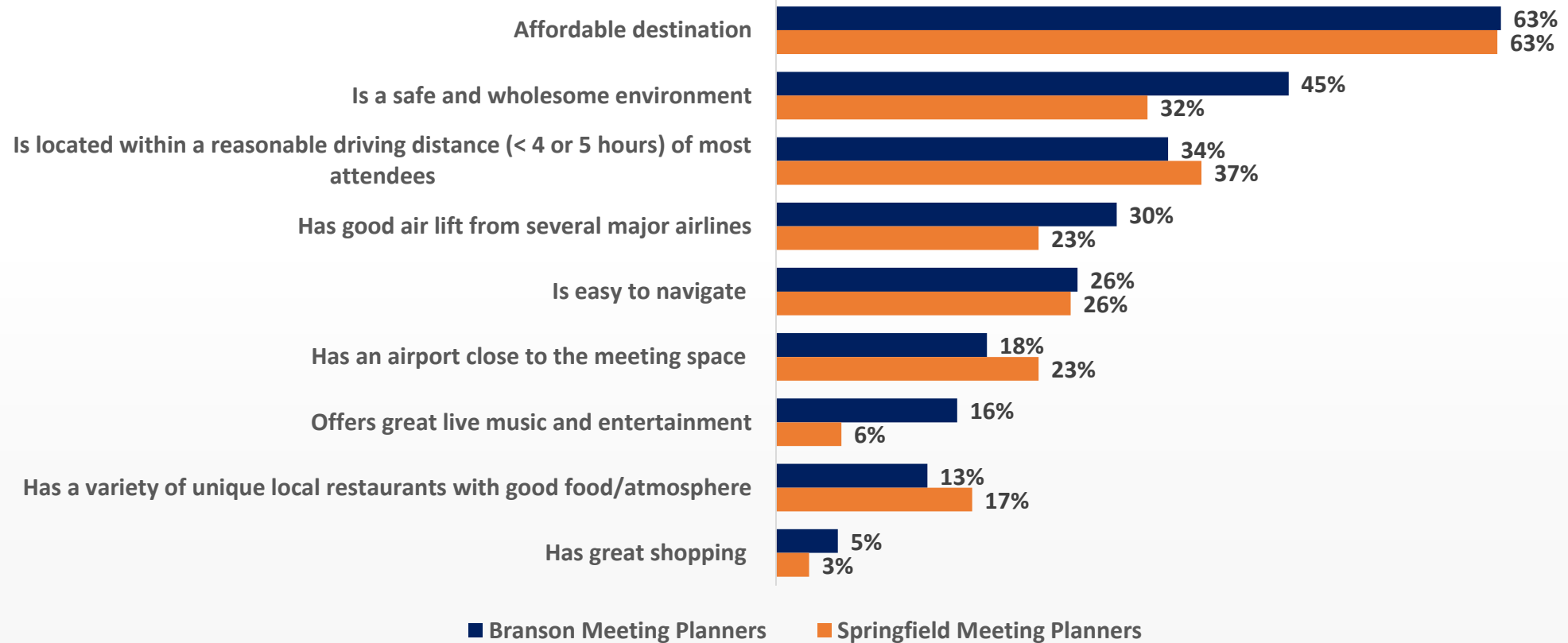


Q3: Which of the following types of meetings do you help plan?

RESPONDENT BASE: ALL RESPONDENTS | N=171
 BRANSON MEETING PLANNERS | N=38
 SPRINGFIELD MEETING PLANNERS | N=35

Overall, meeting planners indicated they were most interested in booking meetings in affordable destinations that were safe/wholesome and located within a compact driving distance for their attendees.

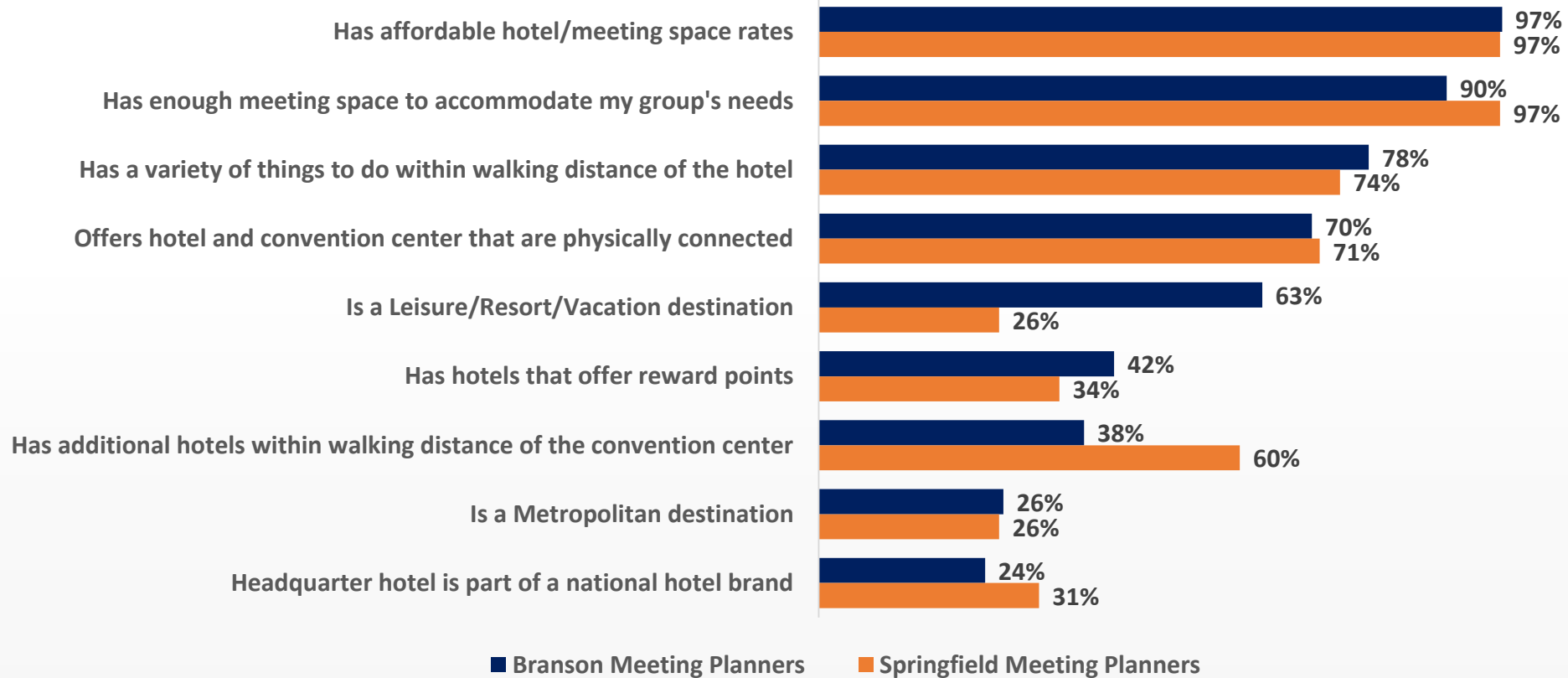
Desirable Attributes of a *Destination*



Q4: Please indicate how desirable each of the following characteristics are to you as a meeting planner. These may be attributes or features that you have previously experienced or those that you may wish were available.

Meetings planners also indicated that they prefer meeting facilities that are affordable, have adequate meeting space and a variety of things to do within walking distance of the hotel.

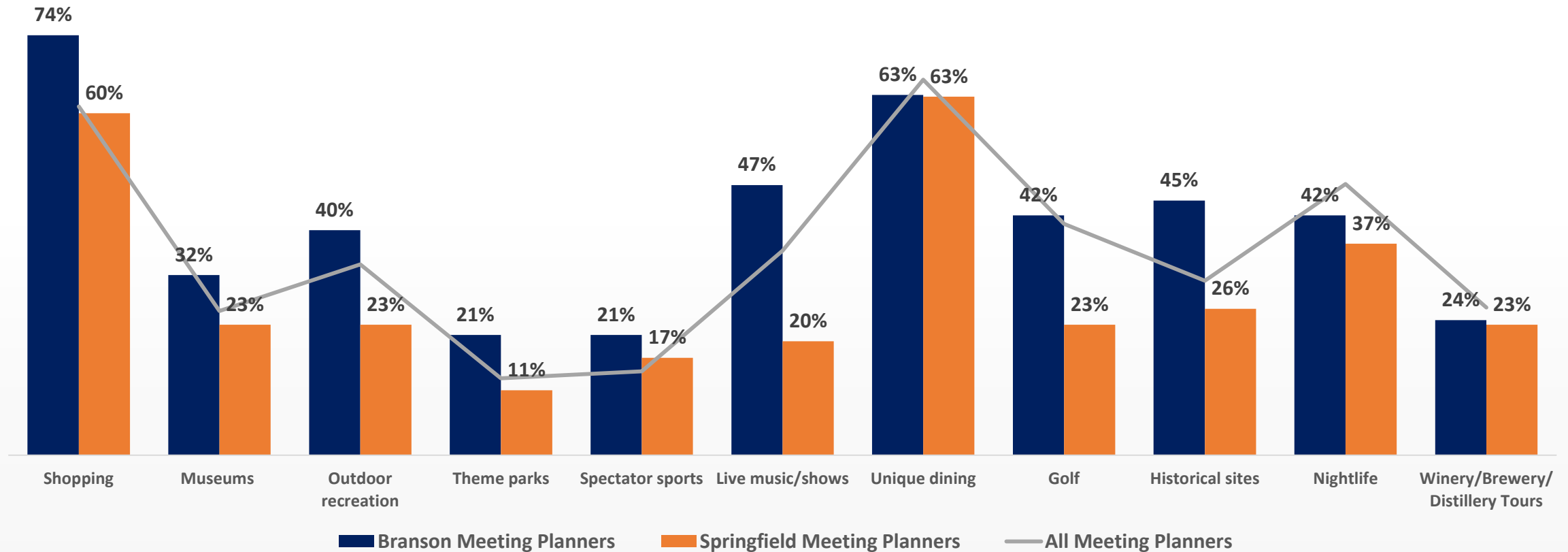
Desirable Attributes of a Meeting Facility



Q4: Please indicate how desirable each of the following characteristics are to you as a meeting planner. These may be attributes or features that you have previously experienced or those that you may wish were available.

Shopping and unique dining top the list of activities meeting planners most want or expect. However, live music, outdoor recreation, golf and historic sites are much more important to those who had booked meetings in Branson.

Activities or Attractions Most Want/Expect

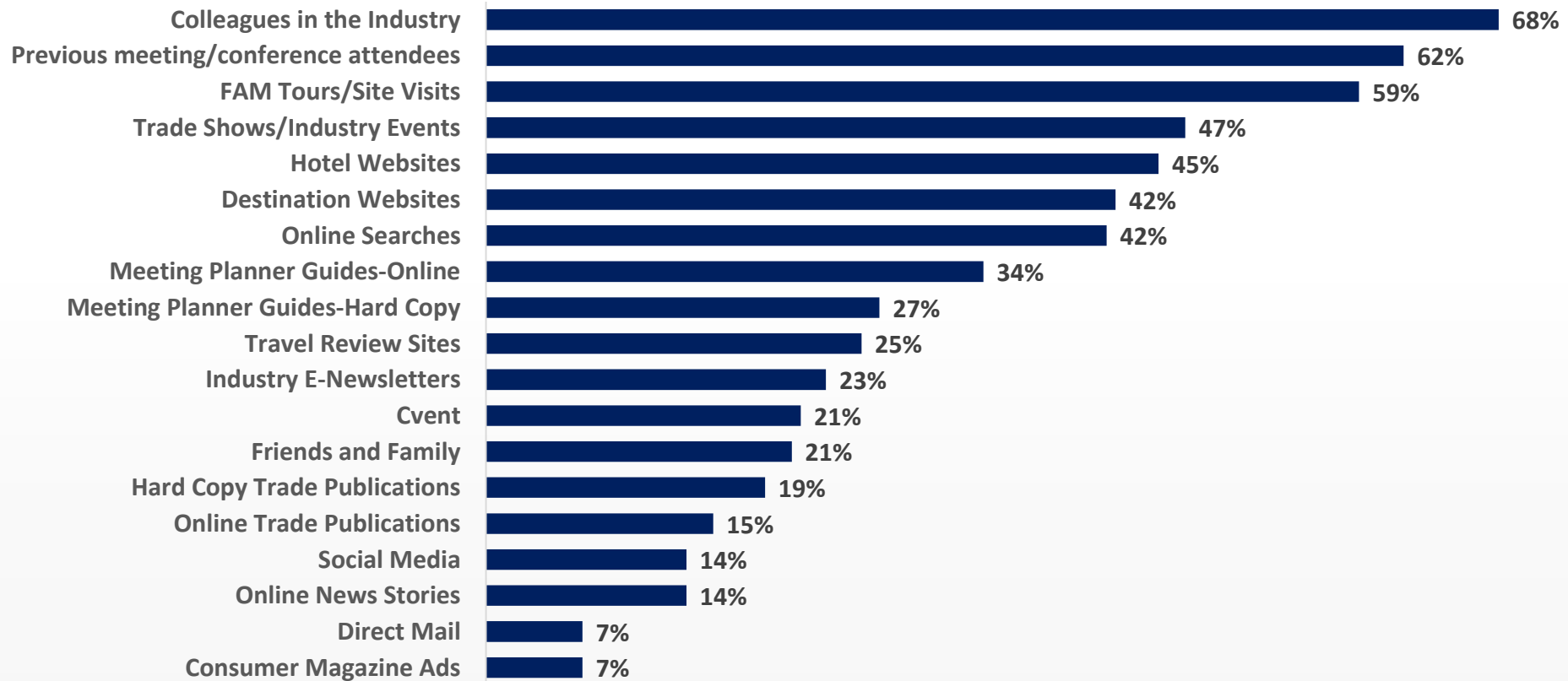


Q5: In your opinion, which of the following activities or attractions, if any, do attendees most want or expect to have available in the destinations where your meetings are held?

RESPONDENT BASE: ALL RESPONDENTS | N=171
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Meeting planners seek inspiration for new destinations from their colleagues in the industry, attendees, FAM tours and trade shows. They are less inclined to use paid media advertising for inspiration.

Sources of Inspiration for New Meeting Destinations



The 14% who indicated they use social media for inspiration primarily turn to Facebook and LinkedIn.



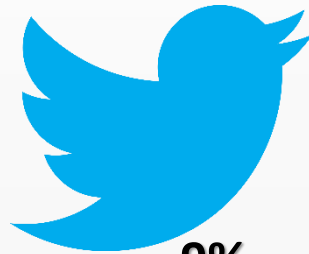
59%



5%



5%



9%

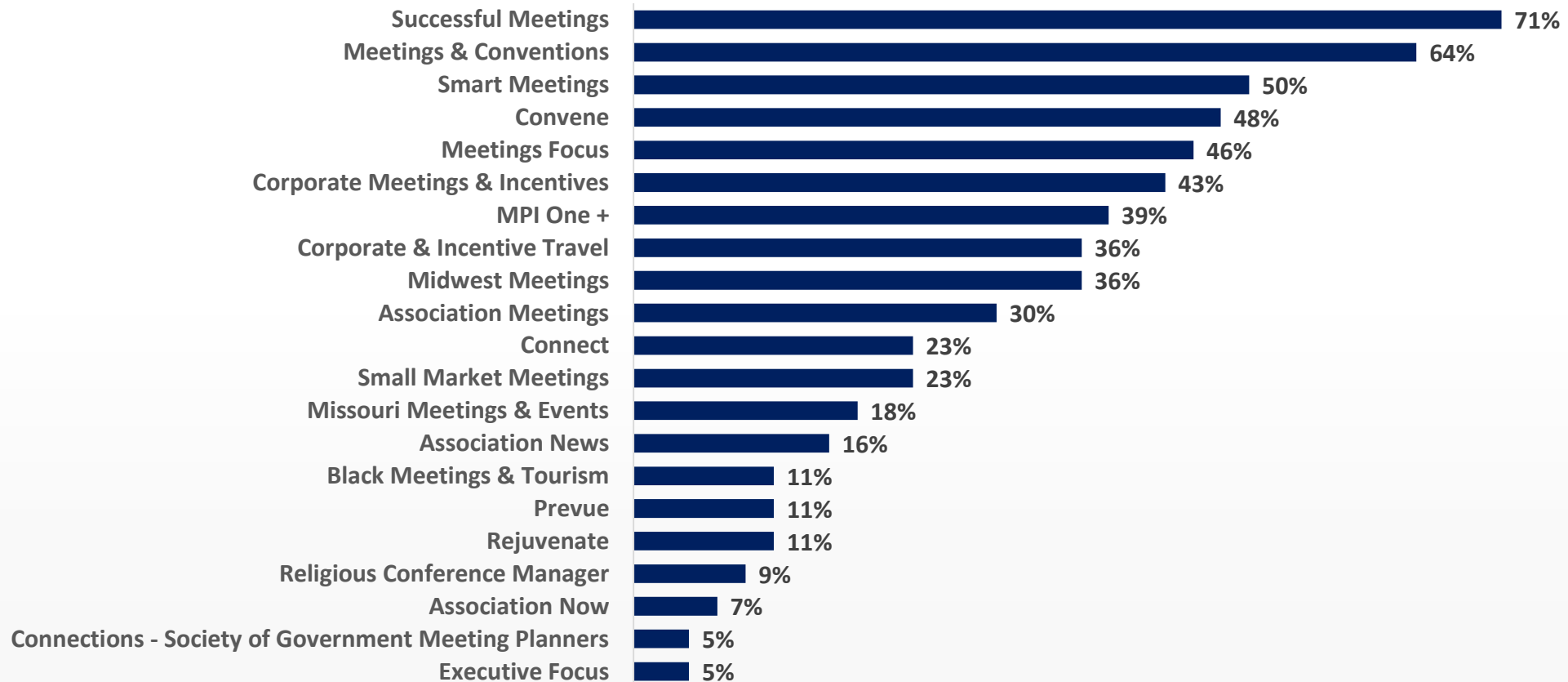


23%

Q8: You indicated previously that you use social media for inspiration on new destinations. Which social media site are you most likely to use to help you find new places you may be looking for?

Those who use trade publications for inspiration are most likely to turn to *Successful Meetings* and *Meeting & Conventions*.

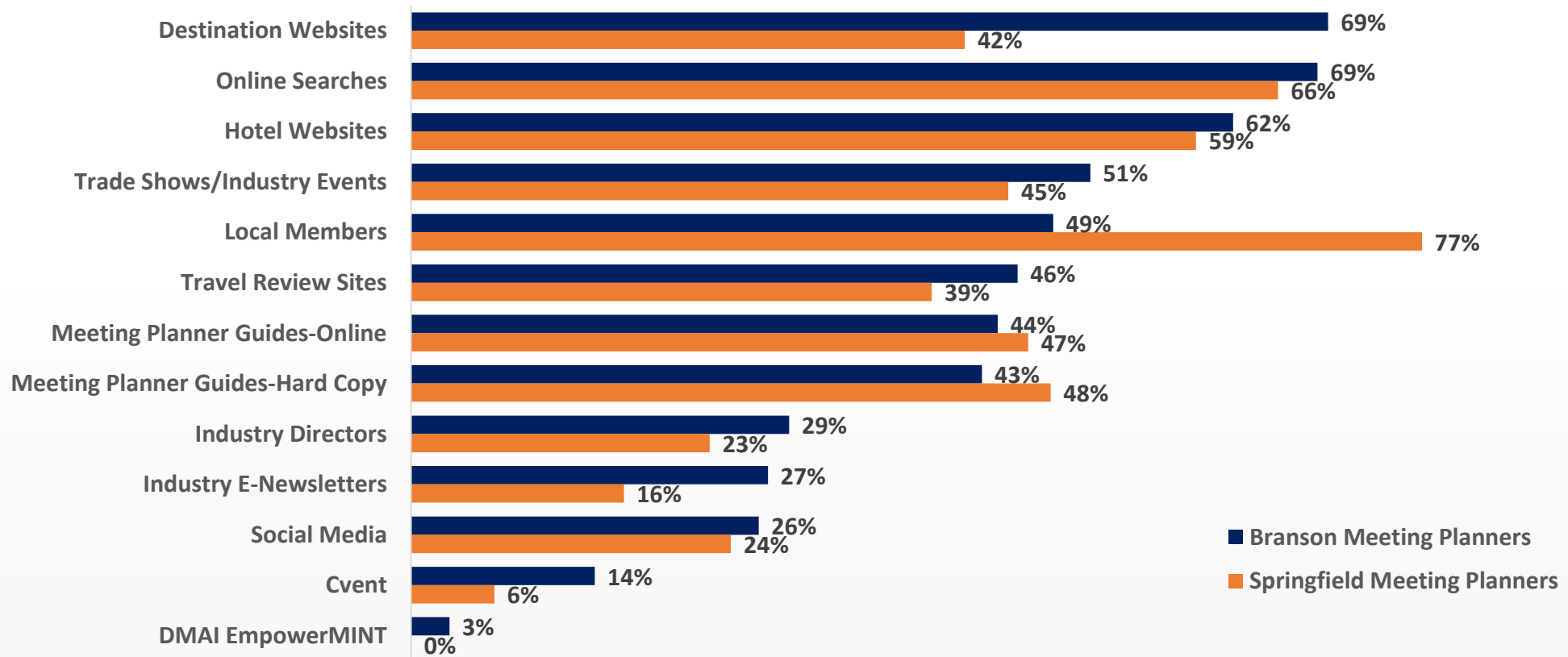
Trade Publications Used for Inspiration



Q9: You indicated previously that you review online or hard copy trade publications for inspiration on new destinations. Which specific trade publications are you most likely to review/read when researching new meeting destinations?

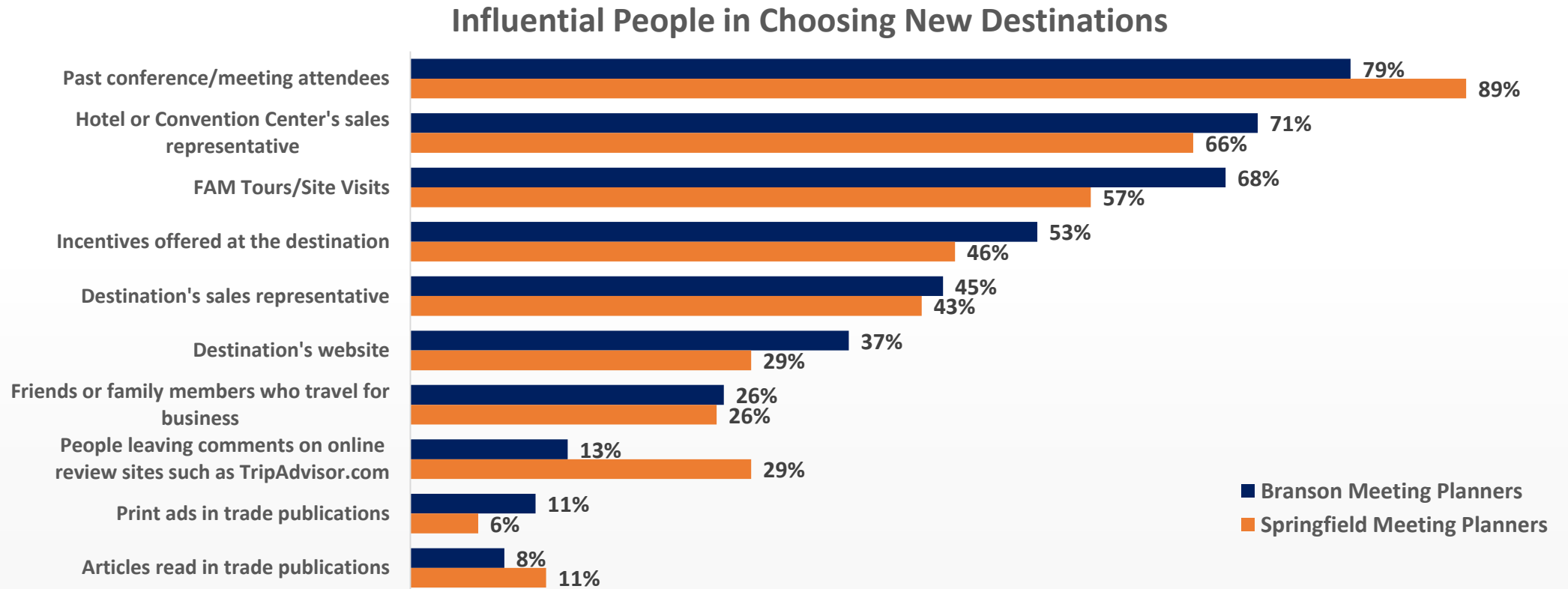
Destination websites and online searches are more influential for those who have booked meetings in Branson while local members are more influential for those who have booked meetings in Springfield.

Influential Media Sources in Choosing New Destinations - % Top 2 Box

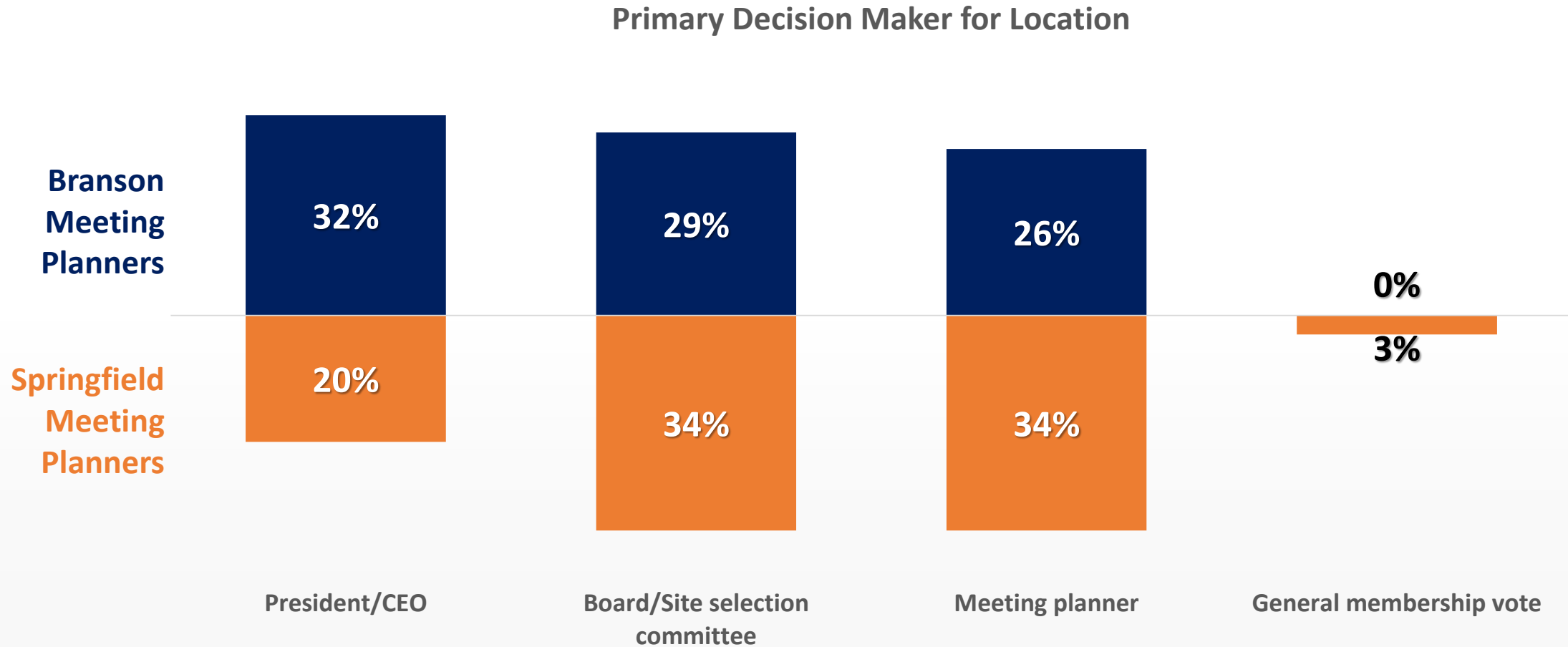


Q10: Using the scale provided, please indicate how influential each of these media sources were in your past decisions regarding which new destinations you would use to host a meeting:

People and relationships can also be very influential. Meeting planners indicate that conferences and sales reps are among those who are most likely to influence their decisions regarding new destinations.



The primary decision maker for selecting meeting locations varies considerably between those booking trips to Springfield and Branson.



Most meeting planners prefer email communication over trade shows, mail, sales reps, phones or social media.



84%



19%



31%



30%



19%

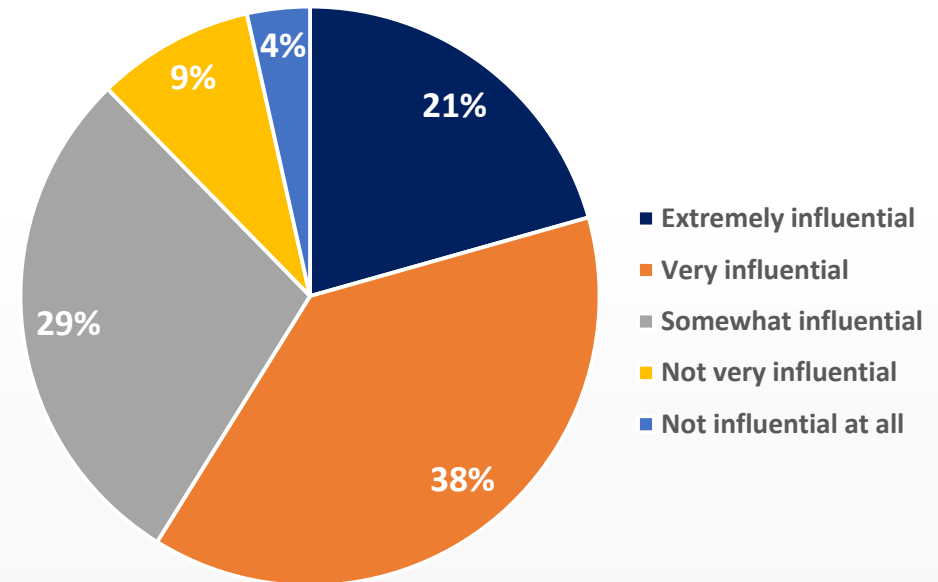


4%

However, personal contact is important. Nearly 8 in 10 meeting planners indicated that face-to-face meetings with destination sales representatives were influential in persuading them to research a destination further.



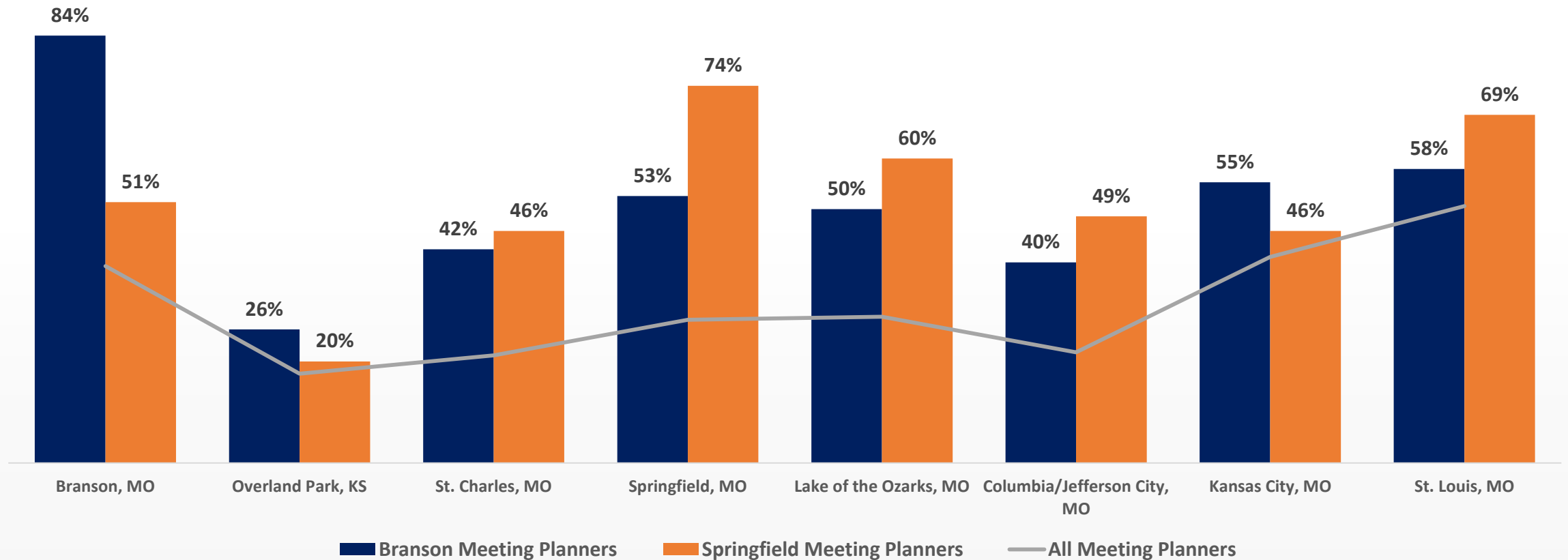
Influence of Face-to-Face Meetings



Competitive Destination Overview

Not surprisingly, meeting planners who have booked meetings in Springfield and Branson are much more familiar with southwest and central Missouri locations than the average meeting planner.

Familiarity with Meeting Destinations

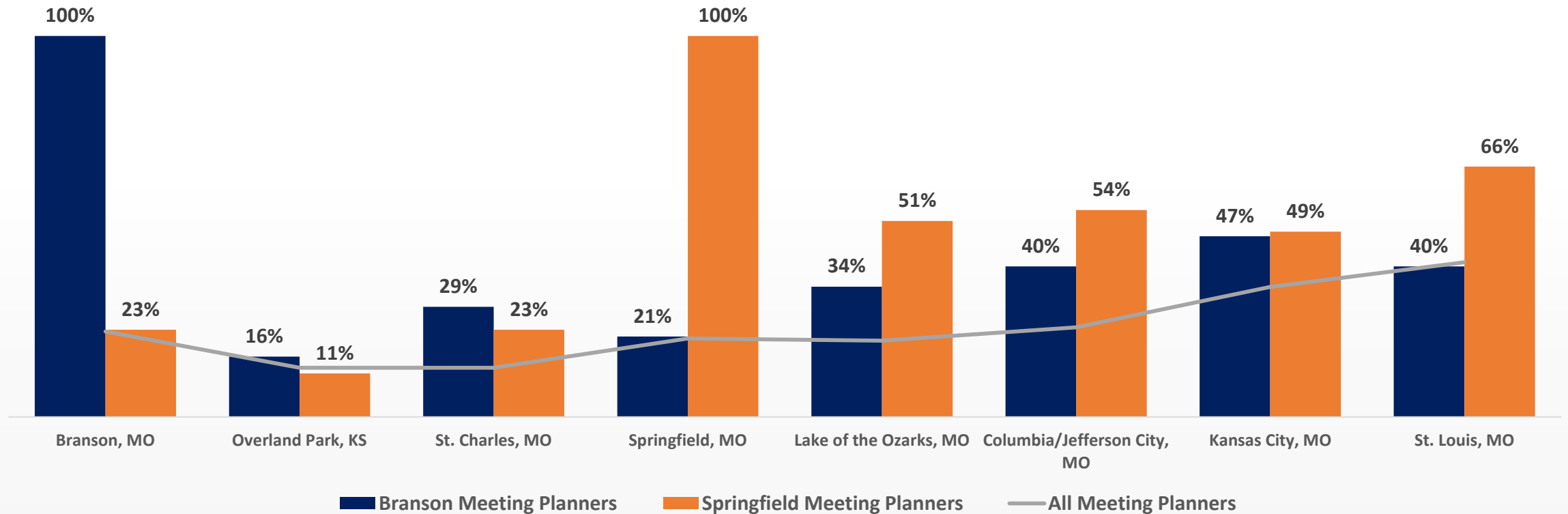


Q15: Using the scale provided, please indicate how familiar you are with each of the following meeting destinations in the Midwest:

RESPONDENT BASE: ALL RESPONDENTS | N=171
 BRANSON MEETING PLANNERS | N=38
 SPRINGFIELD MEETING PLANNERS | N=35

Likewise, those who have booked meetings in Springfield and Branson are also much more likely to have booked in other Missouri destinations than the average meeting planner.

Destinations Booked in Last 5 Years

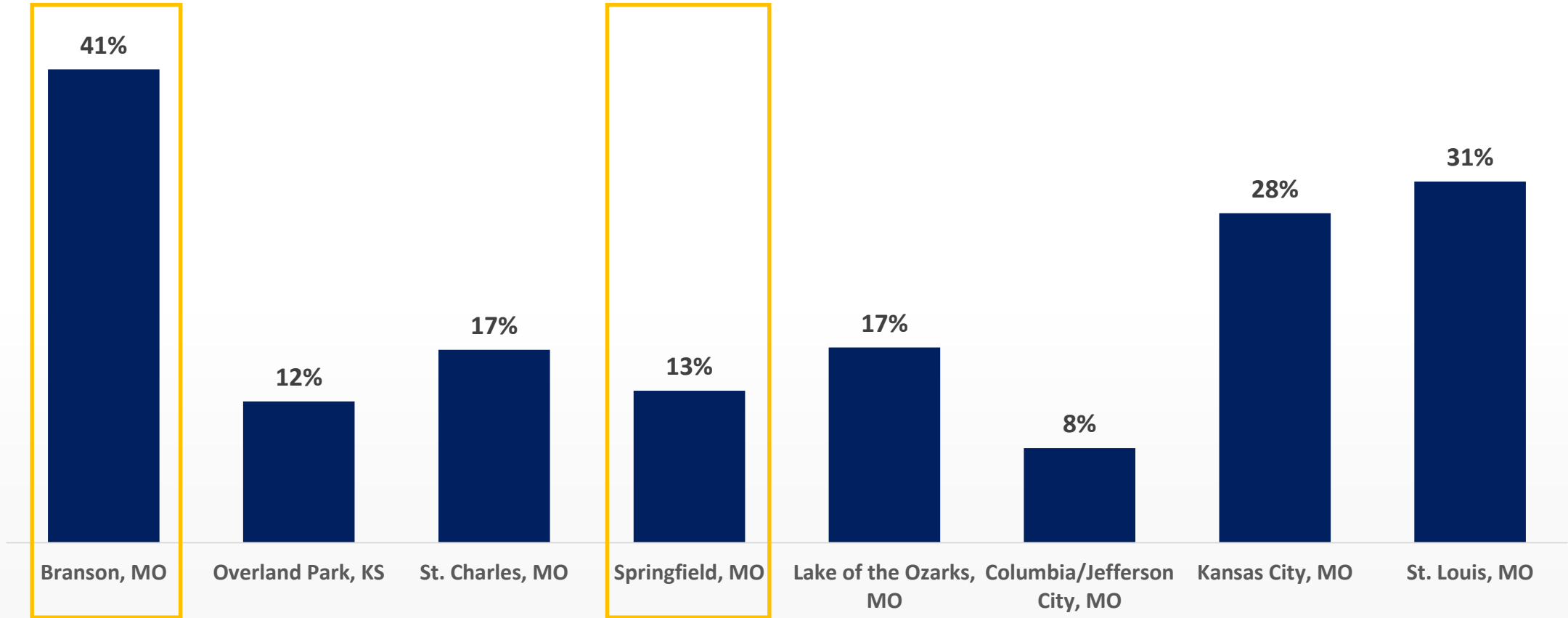


Q16: In which of the these destinations, if any, have you booked meetings over the past 5 years?

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 SPRINGFIELD MEETING PLANNERS | N=35

Interestingly, those who haven't booked in these locations are the most open to booking in Branson, St. Louis and Kansas City.

Openness to Booking Destinations Haven't Booked Before - % Top 2 Box



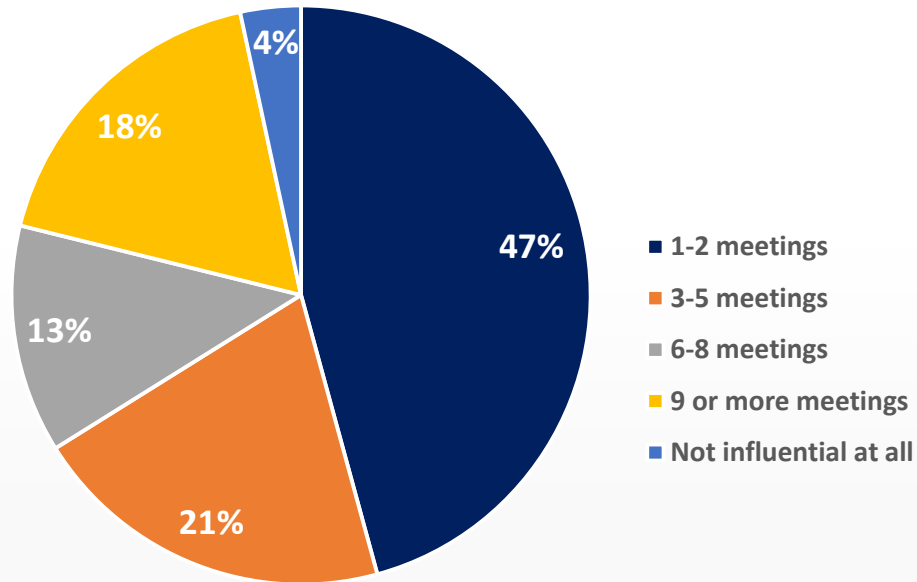
Meeting planners consider Springfield’s biggest differentiator as value while Branson stands out for entertainment and variety. However, both fall short for meeting and lodging facilities, incentives to book and quality restaurants.

Which has the best...	Branson	Overland Park	St. Charles	Springfield	Lake of the Ozarks	Columbia/ Jeff City	Kansas City	St. Louis
Value	11%	15%	19%	46%	21%	43%	13%	7%
Nightlife & Entertainment	31%	7%	4%	2%	5%	6%	11%	13%
Variety of things to do	39%	15%	17%	9%	21%	4%	15%	22%
Meeting Facilities	3%	24%	19%	10%	10%	14%	24%	24%
Lodging Facilities	6%	7%	13%	10%	16%	8%	14%	15%
Warm, friendly residents	9%	13%	11%	15%	16%	16%	3%	1%
Incentives to book	0%	4%	4%	5%	8%	6%	8%	6%
Quality Restaurants	2%	15%	13%	3%	2%	4%	13%	12%

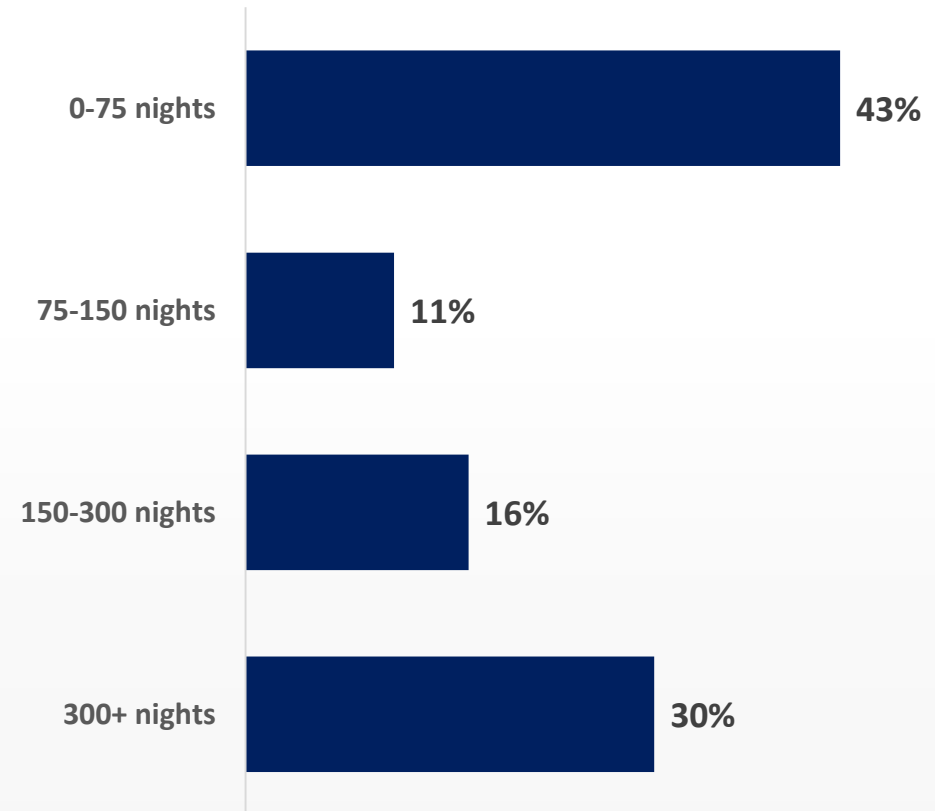
Branson Meeting Planners

More than 22% of the meeting planners in this study have booked in Branson. On average they each booked 6 meetings with approximately 283 rooms per meeting, representing more than 1,600 rooms per year.

Meetings Booked in Branson, MO –
5.7



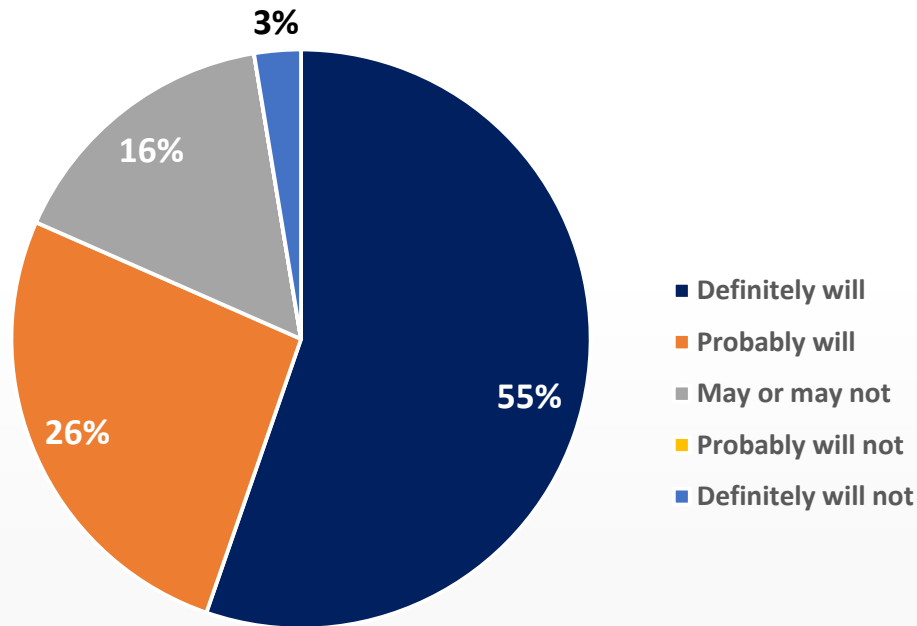
Total Room Nights per Meeting - 283



Q19: How many meetings have you and/or your company booked in Branson, MO?
Q20: On average, how many total room nights were booked for each of these meetings?

More than 8 in 10 meeting planners indicated they would book in Branson in the next 5 years. Only 1 meeting planner said they would not because they do not book in the same location more than once.

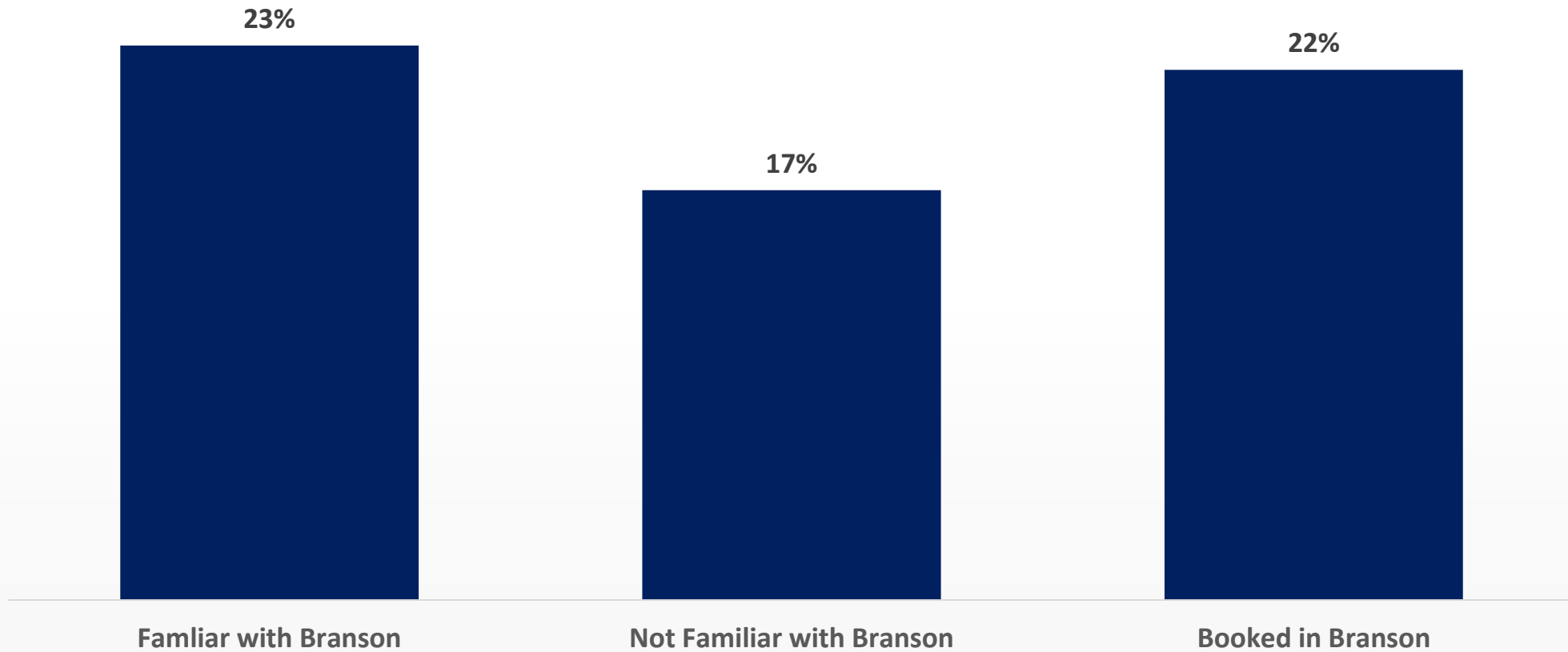
Likelihood to Book Branson Meeting in the Next 5 Years



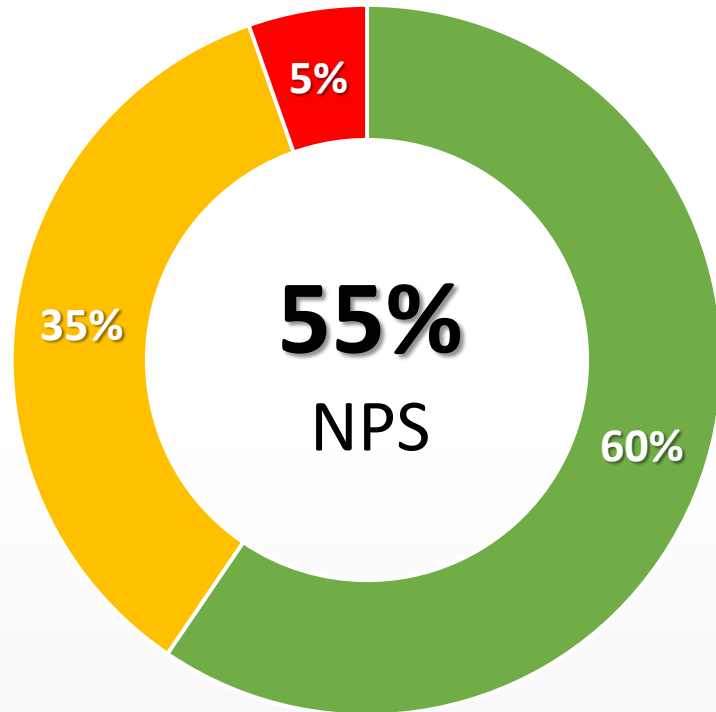
We do not go to the same location more than once.

Those most familiar with Branson are the most likely to have seen the print ad for meeting planners.

Awareness of Branson Print Ad



Meeting planners give Branson a Net Promoter Score of 54%.



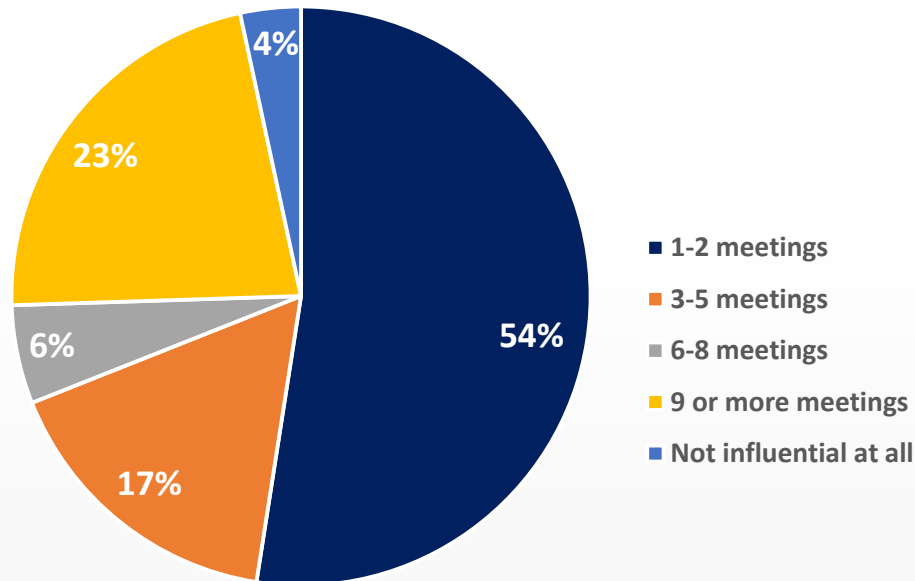
■ % Promoters (9-10) ■ % Neutrals (7-8) ■ % Detractors (0-6)

- Approximately 60% of meeting planners who have booked in the area are promoting Branson as a meeting destination. With only 5% falling into the detractor category, the net score of 54% is excellent.
- The goal of any brand is to have a large number of brand promoters to tell others about the brand. This is especially true among meeting planners as personal relationships and recommendations are the most influential sources for planning and finding new destinations to book meetings and conventions.

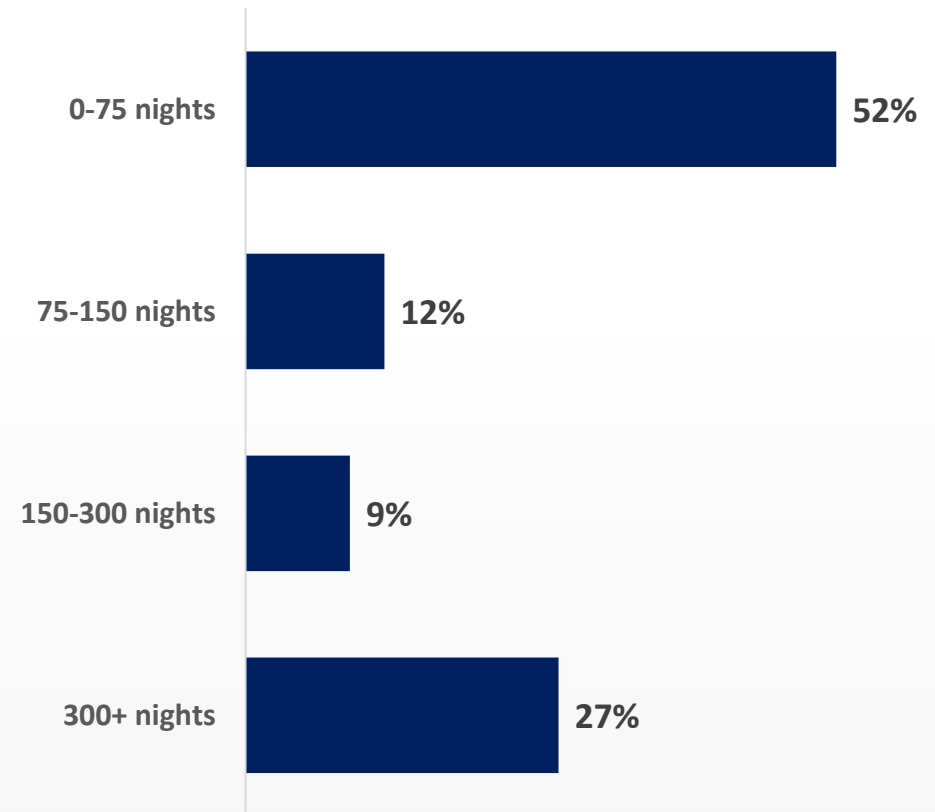
Springfield Meeting Planners

More than 20% of meeting planners in this study have booked in Springfield. On average they each booked 7 meetings with approximately 296 rooms per meeting, representing more than 2,000 rooms per year.

Meetings Booked in Springfield, MO
– 6.8



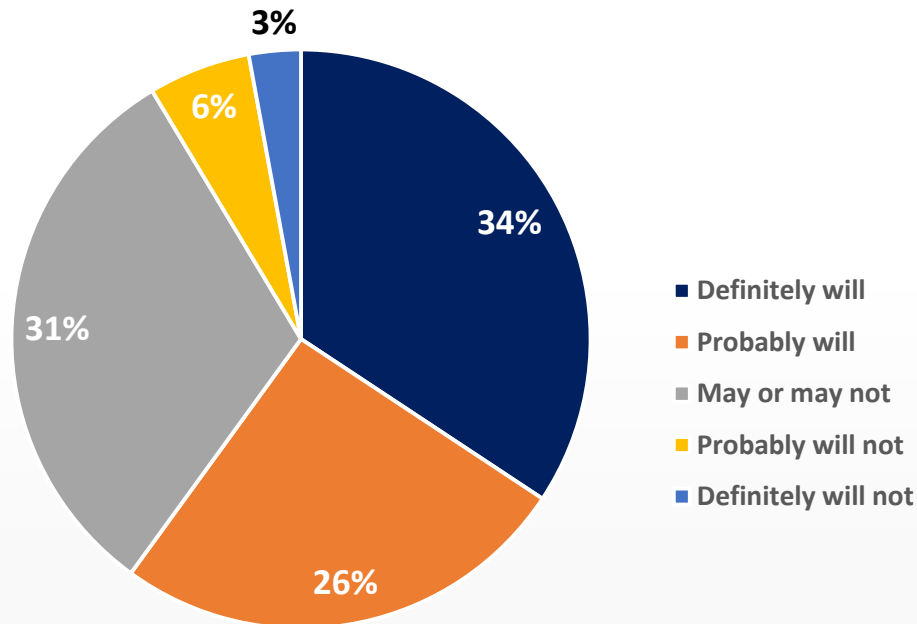
Total Room Nights per Meeting - 296



Q25: How many meetings have you and/or your company booked in Springfield, MO?
Q26: On average, how many total room nights were booked for each of these meetings?

And, approximately 6 in 10 indicated they would book a meeting in the next 5 years. Reasons for not booking include the price of airfare and the location of Springfield.

Likelihood to Book Springfield Meeting in the Next 5 Years



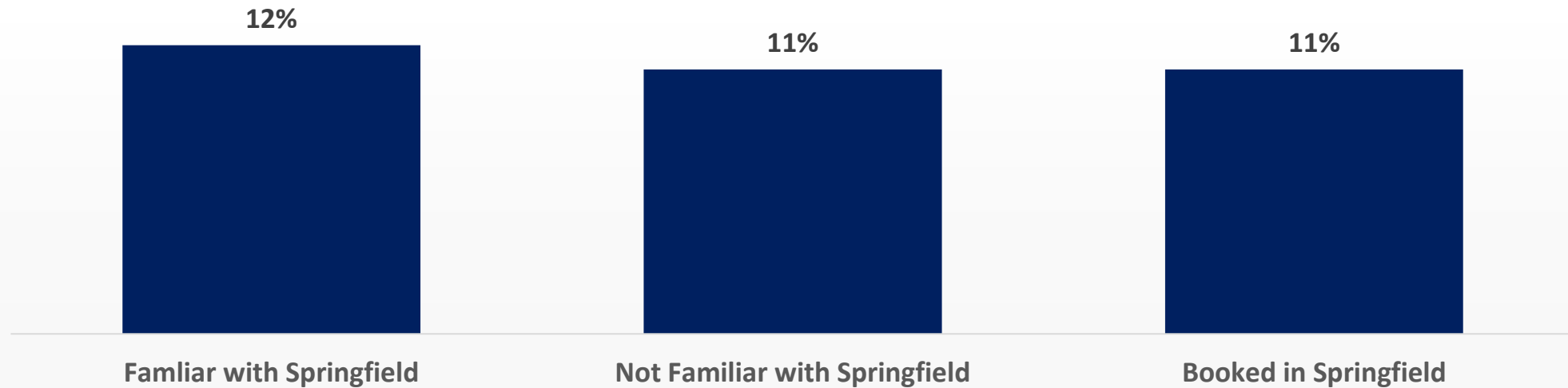
Airfare too expensive

We are on 10 year rotation for our regional meetings and we just completed a meeting in Springfield.

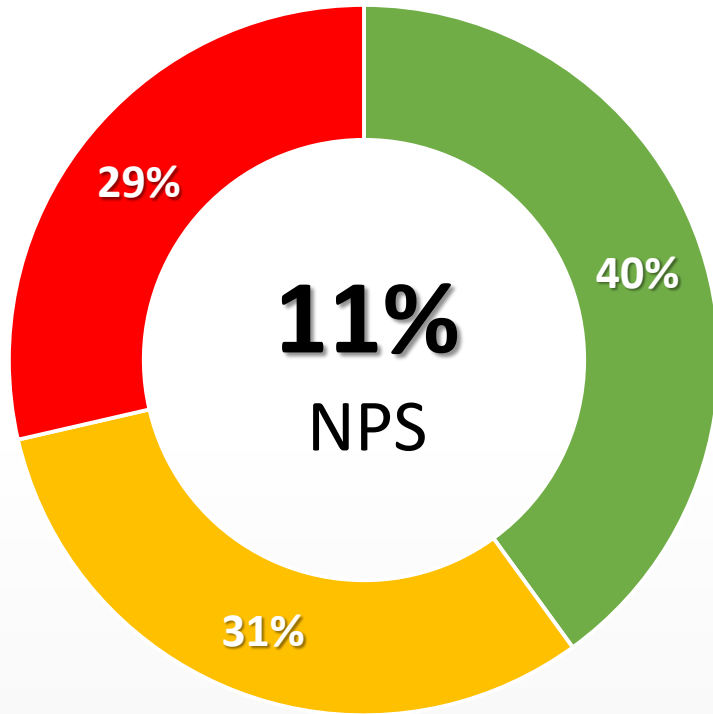
We have our annual Women's Conference in St. Louis, which is too close to Springfield.

Few meeting planners are aware of the Springfield print ad, regardless of whether or not they are familiar with or have booked in the area.

Awareness of Springfield Print Ad



Springfield generates a meeting planner NPS of 11%.



■ % Promoters (9-10) ■ % Neutrals (7-8) ■ % Detractors (0-6)

- Approximately 40% of meeting planners who have booked in the area are promoting Springfield as a meeting destination. However, nearly 30% would not recommend it as a meeting destination, providing for a Net Promoter Score of only 11%.
- Once again, the objective is to maximize the number of brand promoters. Meeting planners use personal relationships and recommendations as influential sources for planning and finding new destinations.

Planner Profiles

Meeting Planners come from several business backgrounds and have been in the business an average of 17 years.

	Overall Meeting Planners	Branson Meeting Planners	Springfield Meeting Planners
Association with Business	8%	8%	6%
President/CEO	16%	26%	27%
Executive Director	46%	40%	38%
Meeting Planner	15%	11%	3%
Third Party Planner	4%	3%	9%
Board Member/Volunteer	4%	5%	3%
Executive Assistant	7%	8%	15%
% Male	30%	35%	29%
% Female	70%	65%	71%
Distance from Branson	514 miles	266 miles	289 miles
Distance from Springfield	501 miles	252 miles	264 miles
Average Age	50	53	51
Years in Business	17	16	18

Conclusions & Implications

Conclusions

- **Geographic trade areas are comparatively compact.** In addition to affordability, safety and wholesomeness, meeting planners look for destinations that are comparatively close to where attendees live and/or have good air lift from several airlines making the destination easy to reach. The Four Times Rule* that applies to individual travelers may impact attendees in a similar fashion. The Four Times Rule indicates that individual travelers will make a point of visiting a destination if it has enough activities that appeal to them and will keep them busy four times longer than it takes them to get there. Hence, if the same theory holds true for meetings, 12 hours of meetings would have a geographic trade area that equates to a 3-hour transportation radius. Having popular leisure activities in a destination helps to increase length of stay and expand the trade area.
- **Meeting planners seek facilities that are convenient.** Meeting planners most desire facilities that are affordably priced and have adequate meeting space that is physically connected to hotel accommodations. Those facilities that are located in destinations that offer attendees a variety of things to do also have an edge over other destinations.

Conclusions

- **Activities are important satisfiers.** Destinations that offer a variety of unique shopping opportunities and unique local restaurants have a distinct edge as do those places that feature a variety of things to do, entertainment, nightlife and golf. Attendees prefer to visit destinations that have fun things to do, and meeting planners want and expect these kinds of amenities.
- **Inspiration is driven by people.** Meeting planners indicate they are most likely to be inspired to book meetings in a new destination based upon the input they get from other colleagues around the industry, previous attendees, their FAM tour experiences and sales representatives they encounter at trade shows. For inspiration, all of these are considered more important than hotel websites, magazine ads, direct mail, online news or social media. That is not to say, however, that these paid media channels do not play an important role in their overall path to purchase.
- **Once inspired, meeting planners turn to online tools to research.** Once they've been inspired to investigate a destination or facility, meeting planners then turn to destination websites, online searches and hotel websites to help them do their research and planning, and ultimately make a decision about whether they want to learn more or not.

Conclusions

- **Initial communication is best done by email.** Meeting planners are busy people and most have a lot of diverse responsibilities. They welcome communication with destination and hotel sales representatives, but would prefer that communication come in the form of email. Other communication channels they like include meeting at trade shows, receiving mail pieces or visiting in person with sales representatives. Most say they would prefer to hear from sales representatives about once a month or less.
- **One-on-one meetings with sales representatives are important.** More than 8 in 10 meeting planners say that in-person meetings with destination sales representatives are influential in their decision to book. Once again, people are instrumental in both the influence and closing of sales while websites and online searches are preferred for gathering research background.
- **Differentiators.** Among competitive destinations across Missouri, Springfield is perceived as being most differentiated by its value for the dollar while Branson is perceived as the best place for variety and for entertainment. Neither destination, however, has meeting facilities that compete particularly well with other destinations in or around Kansas City or St. Louis.

Recommendations

- **Champion the construction of facilities that meet meeting planners needs.** Meeting facilities matter a great deal. If the facility is not affordable, does not have adequate meeting space or is not connected to lodging accommodations this may provide enough of a reason for a meeting planner to book elsewhere. To be or become more competitive, both Springfield and Branson need to continue to work at providing meeting space and accommodations that rival those found in and around both Kansas City and St. Louis.
- **Use a multi-channel platform across meeting planners' paths to purchase.** Meeting planners use a variety of channels to ultimately book a new destination. They tend to be inspired to research new destinations by colleagues, attendees and sales reps. Once inspired, they turn to internet tools to do their research. And, if interested, they build comprehension by taking a FAM Tour, visiting a sales rep at a trade show or connecting in some other manner. People are the ones who are most likely to inspire, influence and close the sale. It is mission critical that both Springfield and Branson CVB's leverage their sales representatives and the relationships they have with meeting planners. This may ultimately be the most controllable differentiator in the entire process.



SUCCESS

Know Your Customer
Grow Your Business

ALL RESPONDENTS

Types of meetings planned:

300 person client meeting
Conferences
Conferences
Conferences and committee meetings
Conferences; Grant Reviews
Continuing Education Seminars
disability specific conferences
educational conference for our leadership
Educational seminars
Government educational sessions
group tours
group travel
Incentive Travel
Incentives, Sales Meetings
Judicial education sessions
Pharma
regional meetings
Religious Conferences
Reunion
Scientific meetings and conferences
Seminars, Workshops
senior group
special meal functions
Training
training meetings
Workshops, Training and Seminars
youth group and camps

ALL RESPONDENTS

Inspiration for new destinations for meetings:

30 years of industry meeting planning experience
chamber of commerce
Client preferences
Connect
Convention and visitors bureaus
CVBs
CVB's
experient information
I like to visit the sites myself.
library
local convention bureaus
Member FICP and attend IMEX each year
Membership Driven
MtcPost.com
Primarily the convention and visitors bureau
Recommendations of other meeting planners
Senior Management recommendations
Society of Government Meeting Professionals members
Southeast Tourism Society, association CVB members, facility search service (somewhat like Cvent)
SYTA
The client's requests
Third party planners or national sales reps from hotels
tour companys
We depend on our members for meeting locations.
We usually stay local to avoid travel costs

RESPONDENTS WHO USE ONLINE SEARCHES (Q6)

Online search terms most likely to use to help find new places for meetings:

4 or 5 star	resort			
4 star hotels with meeting space	Best hotels in _____			
ADA accessibility		Ground transportation		
Affordable	Close Airport other groups our size	hotel sites		
arenas				
best meeting locations	corporate meeting destinations	business destinations		
business meetings	conference centers			
cities interested in City name I am considering	CVB of areas			
Climate	Air service Activities	Number of hotels	Available airports	
conference center	corporate retreat	unique venue		
Conference centers	Meeting spaces			
conference facilities	meeting space			
Convention Center	Hotel name of city or destination	Meeting Venue		
convention center		hotel name	meeting space	
Convention center websites	Check out meeting space at venues			
convention centers	conference centers	hotel conference center	hotel meeting space	
Convention Centers Missouri	Hotel Convention Center			
Convention city	Unique convention location	Convenient group location	Affordable travel destinations	Major convention destinations
convention destinations	corporate meeting destinations	family destinations	convention and visitors bureaus	

RESPONDENTS WHO USE ONLINE SEARCHES (Q6)

Online search terms most likely to use to help find new places for meetings:

convention hotel cvb	convention bureau national chains Hotel Brands, ie Marriott, Starwood, Hilton	Destination city	Unique destinations	City
CVB + City	Hilton	CHAMBER OF COMMERCE SITES	SPECIFIC DESTINATION SITES	
CVB SITES	HOTEL SITES	state tourism offices		
cvb's	tripadvisor	airlift to close airport	trip adviser rates	
destination name	CVB site	Warm weather resorts for 100 people	Downtown Hotel walkable to dining	Unique offsite venues for 500 people
five star hotels in (i.e.) Northeast frommers	Unique resorts in California google Google images	bing	expedia	travel zoo
Google Google Google GOOGLE Google Google	Hotel Sites	Meeting News		
google destination				
google searches	cvent - supplier network			
google.com	cvent	tripadvisor		
Hotel Conference Center Missouri hotel meetings	Law Enforcement Training Conference			
hotel with conference rooms Hotels	hotel near airport Dinner Shows (name of hotel) distance from airport	conference center with hotel space Restaurants (name of hotel) driving directions	top conference center in (blank) city	unique meeting spaces
Hotels in (city) Hotels located near				

RESPONDENTS WHO USE ONLINE SEARCHES (Q6)

Online search terms most likely to use to help find new places for meetings:

international airport	CVB			
Large convention centers Location convention and visitors bureau	affordable convention centers			
luxury resort meeting space	hotel web sites meeting hotel in xyz area convention	luxury hotel in xyz area	new meeting space in xyz area	new hotel
missouri convention center	missouri hotel	branson convention other tour	springfield convention	columbia convention
names of states and cities Pinterest Price size of hotel SMART DESTINATIONS	group tours magazine Trip Advisor convention/hotel meeting space SM	company's brochures Travel Guides numbers/size location MEETINGS FOCUS	Tourism Boards accommodations M & C	Cvent INTERNATIONAL DESTINATIONS
special promotions travel and leisure website	offers tripadvisor	group deals		
Trip Advisor regions unique	Brand website family friendly	Third Party Companies	City/State visitor websites	
VisitMO.com visitor bureaus Warm weather meeting location	missouri hotels	missouri meetings & events		
yahoo.com	travelchannel.com			

ALL RESPONDENTS

People or sources that are most influential in decision to plan in a new destination:

30 years industry experience
Attempt to rotate around the U.S.
chamber of commerce
Client's requests/need
Convention & Visitors Bureau
CVB
Discussion with our association board
face to face meetings at trade shows
feedback from clients on future location
government rate rooms available
I recomend and client is the final decision maker
incentives from the CVB
local volunteers, if local area has a tie to the conference topic
meeting planners
MtcPost special offers
None - committee decides locations
Other meeting planners
Other meeting planners
Stakeholder suggestions/requests
SYTA
The member's opinions
the proposal - dates and rates
the space and package is the deciding factor for us
Travel Agent
We send out an RFI to see if dates & space fit. We then look at proposed costs. Then site visit if acceptable.

ALL RESPONDENTS

Primary decision maker for selecting meeting location:

Board of Directors or Executive Committee

CEO and Client

client

client, could be a CEO/President or Board/ committee

Collective between conference department, VP of Operations & CEO

Depends - I have several clients and all are different

Director

Host of Retreat

I research, negotiate, narrow down, propose for final by VP

I travel to the sites and make the decision myself.

Its a committee decisions based on meeting planners findings

Me

meeting host - specific business/department group

Ministry Director

Planning committee

Regional Director

self with final approval from VP

Varies

we are a 3rd party

Whoever of the members of our Society invites us to come to their location. A local club does the majority of the work after the meeting planner selects a hotel or convention center.

Zone Manager

ALL RESPONDENTS

Preferred method of communication from destination sales representatives:

email

I like to visit the sites.

I would not want any and will seek my own info

Industry/Destination Events

local fam tours

not at all

through my contact at Experient

trip to destination to visit potential sites

RESPONDENTS WHO ARE NOT LIKELY TO BOOK AGAIN IN BRANSON (Q21)

Why not likely to book in Branson, MO in next 5 years:

We do not go to the same location more than once.

RESPONDENTS WHO ARE NOT LIKELY TO BOOK AGAIN IN SPRINGFIELD (Q27)

Why not likely to book in Springfield, MO in next 5 years:

'Airfare too expensive

We are on 10 year rotation for our regional meetings and we just completed a meeting in Springfield.

We have our annual Women's Conference in St. Louis, which is too close to Springfield.