



# DestinationMAP

Volume 1: Standard

## Overview and Key Findings

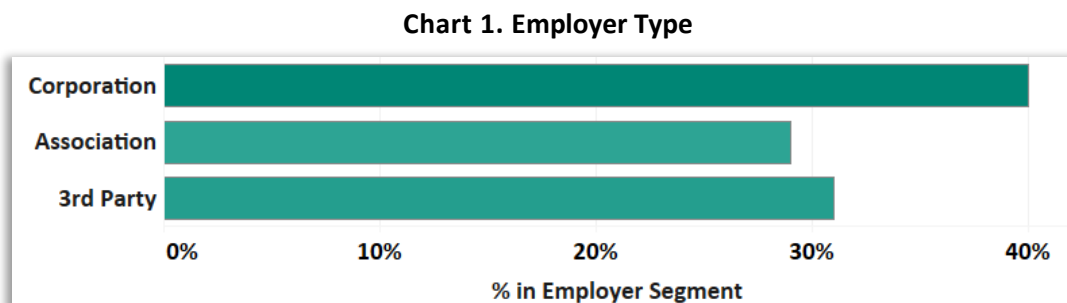
2017 DestinationMAP is a comprehensive study of meeting planners and the meetings market in North America. The report provides detailed description of meeting planners' preferences and their perceptions of 40 North American markets. DestinationMAP is in its 17<sup>th</sup> publication, which allows trend analysis of the issues most important to meeting planners in site selection.

DestinationMAP is presented in two volumes. Volume I is a state-of-the-industry report and is presented in two editions. The Volume 1 Standard edition is focused on the type of planner: Corporate, Association and 3<sup>rd</sup> Party. A separate report is available titled Volume 1 Large Events edition which focuses on the size of largest meeting planned. Volume II is a customized report focusing on the market position of a specific destination compared to other destinations in the top 40 list. Topics covered include brand image, market share and other types of evaluative data.

The following key findings are from the 2017 DestinationMAP Volume 1 Standard edition:

### Key Findings

**Corporate planners make up the largest meeting planner segment followed in almost equal proportions by Association and 3<sup>rd</sup> Party planners.**



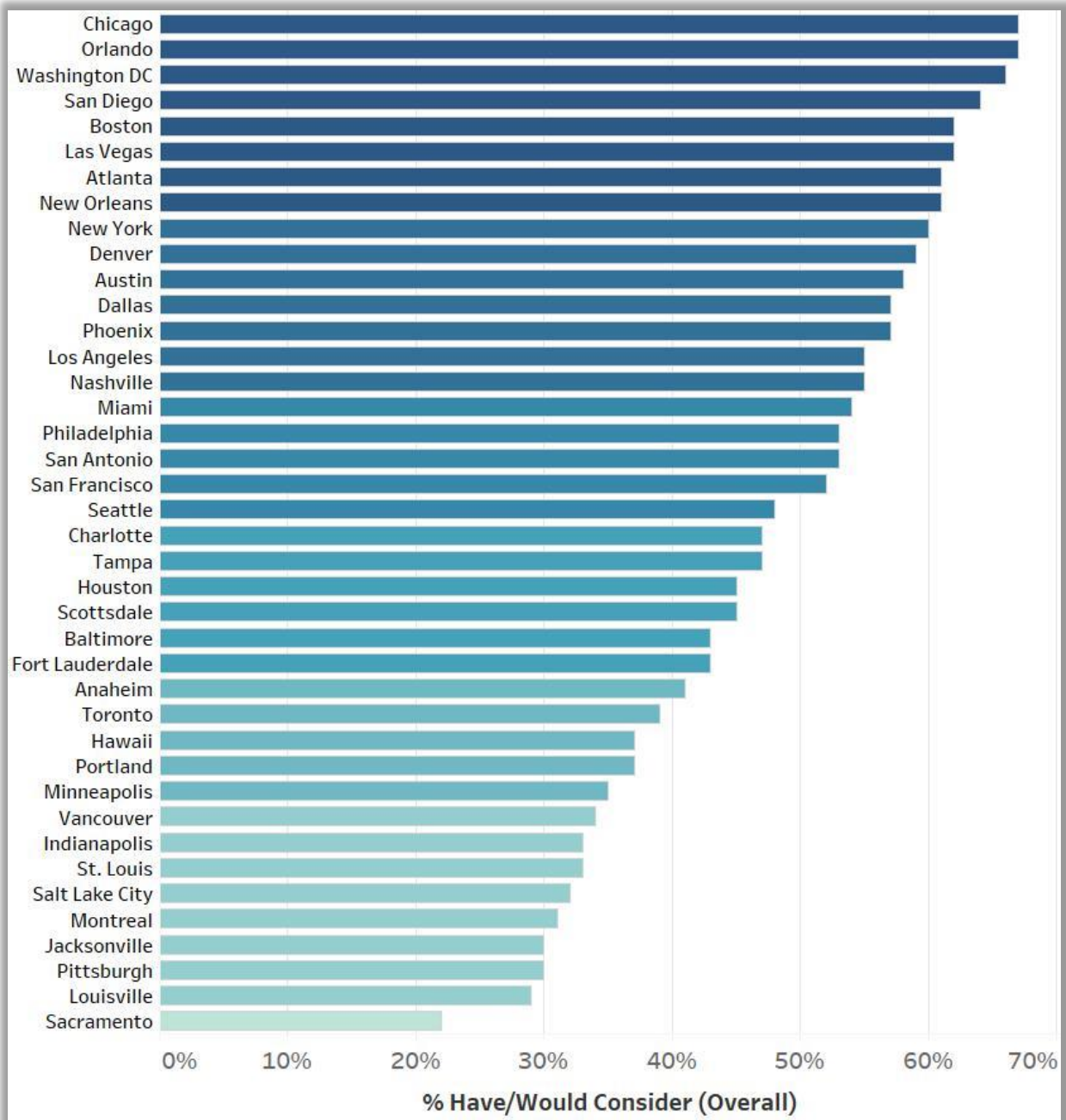
**Corporate, Association and 3<sup>rd</sup> Party meeting planners reflect different characteristics.**

- Corporate planners conduct more small meetings and are younger.
- Association planners conduct fewer meetings overall and are less likely to have a CMP or similar certification.
- 3<sup>rd</sup> Party planners plan the greatest number of meetings and they tend to be older.

**Chicago and Orlando are the top markets in meeting planners' consideration set.**

- Washington DC, San Diego and Las Vegas round out the top five destinations considered.
- Additionally, destinations used (past and future) follow a pattern similar to consideration. A notable exception is New York City entering the top five in terms of past and future usage (pushing down San Diego).

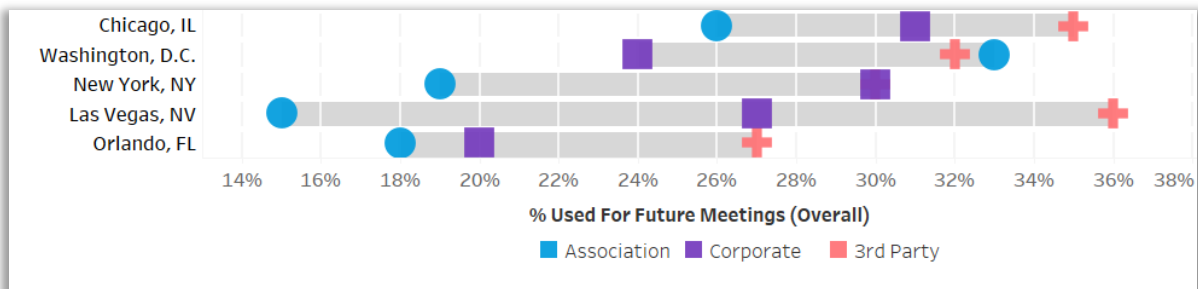
**Chart 2. Destinations Considered**



**Corporate, Association and 3<sup>rd</sup> Party planners demonstrate differences in destination consideration, and past/future usage.**

- 3<sup>rd</sup> Party planners are more likely to consider and use almost all of the 40 markets more than the other two meeting planner segments; Las Vegas is the top market for future use.
- Association planners are more likely to consider and use Washington DC compared to Corporate planners.
- Corporate planners are more likely to consider and use New York City compared to Association planners.

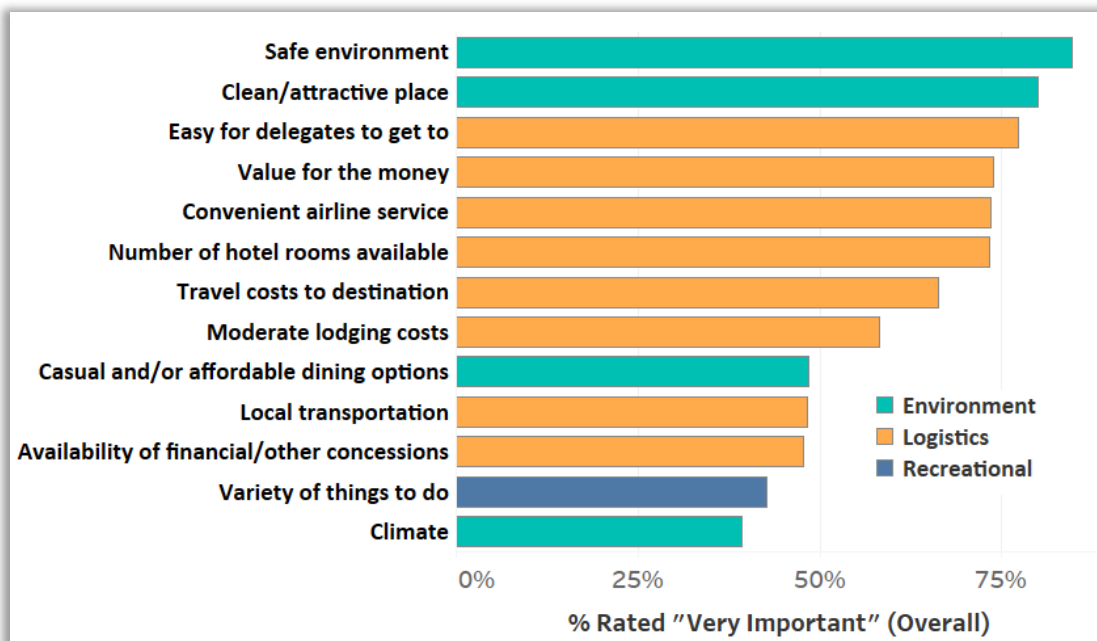
**Chart 3. Top Five Destinations for Future Use (Next Two Years)**



**Safe and clean are overwhelmingly the top considerations when selecting a meeting site.**

- Logistical considerations also rank high in importance.
- Other environmental and recreational considerations are important but to a lesser degree.

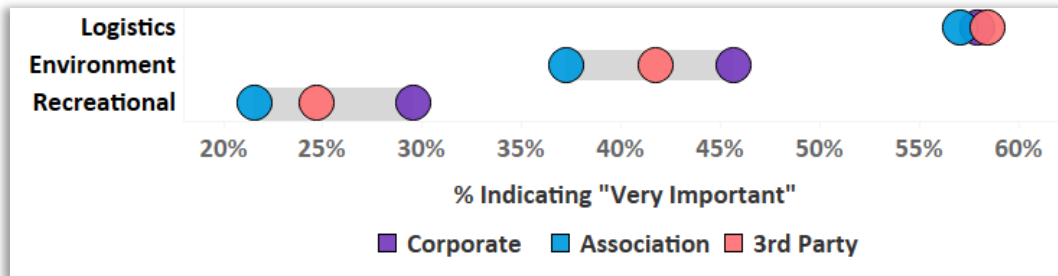
**Chart 4. Consider Characteristic Important When Selecting a Meeting Site**



Logistics are important to all meeting planner types. Differences exist across environmental and recreational considerations.

- Corporate meeting planners rate environmental and recreational areas as more important.
- Association planners rate these considerations as relatively less important.

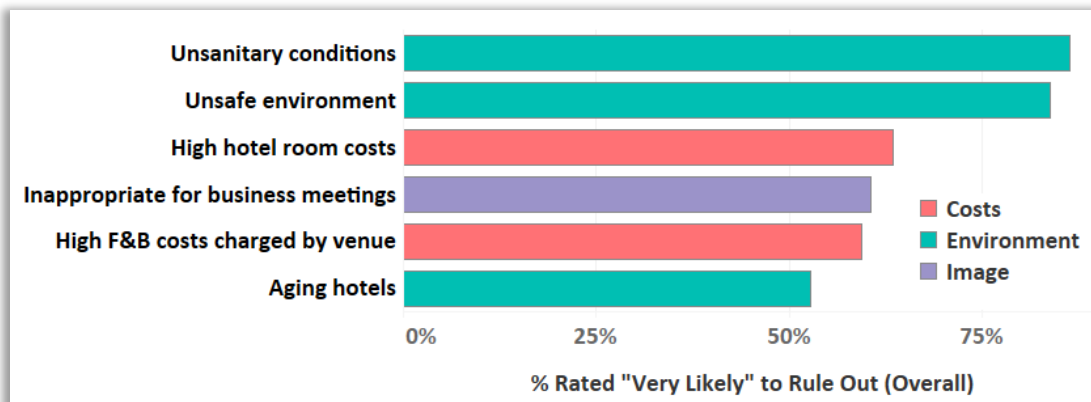
**Chart 5. Consider Characteristic Important When Selecting a Meeting Site**



Environmental deterrents (unsanitary and unsafe) are the dominant deterrents noted by almost all meeting planners.

- Costs issues, appropriateness for serious meetings and aging hotels were also noted as deterrents by the majority of meeting planners.
- Corporate planners tend to be more sensitive to most deterrents compared to Association or 3<sup>rd</sup> Party meeting planners.

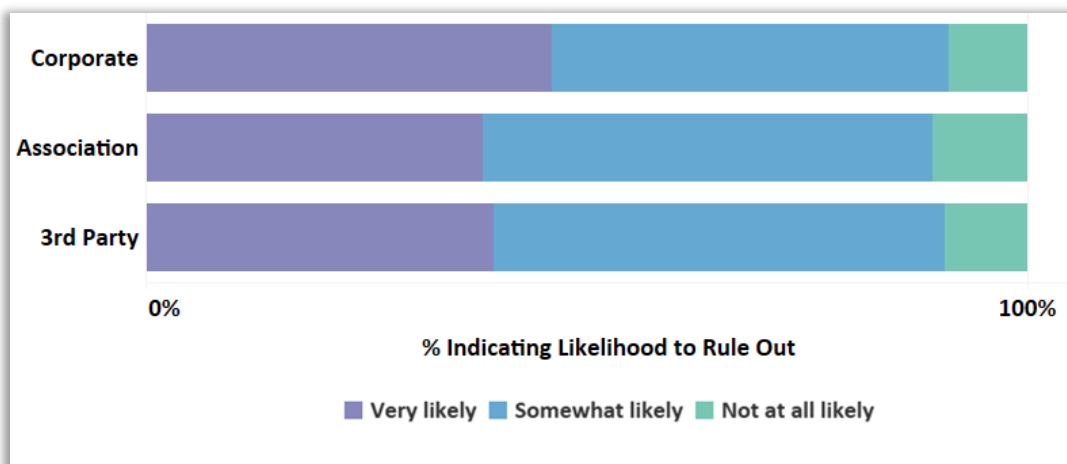
**Chart 6. Consideration Would Cause Planner to Rule Out Destination as a Meeting Site**



**With all the news in the press about the impact of bad publicity on a destination, this topic is only a moderate concern for meeting planners.**

- Recent bad publicity is mentioned by less than half of meeting planners as something that would “very likely” deter them from selecting a meeting site.
- Adding the “somewhat likely” group to this statistic increases mention of this consideration to over 90% likely to rule out a destination, so while it is a moderate concern, the topic should not be ignored.
- Corporate planners are somewhat more sensitive to this issue with almost half indication they would “very likely” rule out a destination due to bad publicity.

**Chart 7. Recent Bad Publicity Would Cause Planner to Rule Out Destination as a Meeting Site**



**Effective marketing to meeting planners is achieved through a variety of ways.**

- Destination websites are the primary marketing channel experienced by meeting planners.
- RFP solicitation more frequently comes from the hotels directly; just over one-fourth of meeting planners use a DMO/CVB.
- Incentives offered to the majority of meeting planners include free/discounted Wi-Fi, meeting space and hotel rooms.

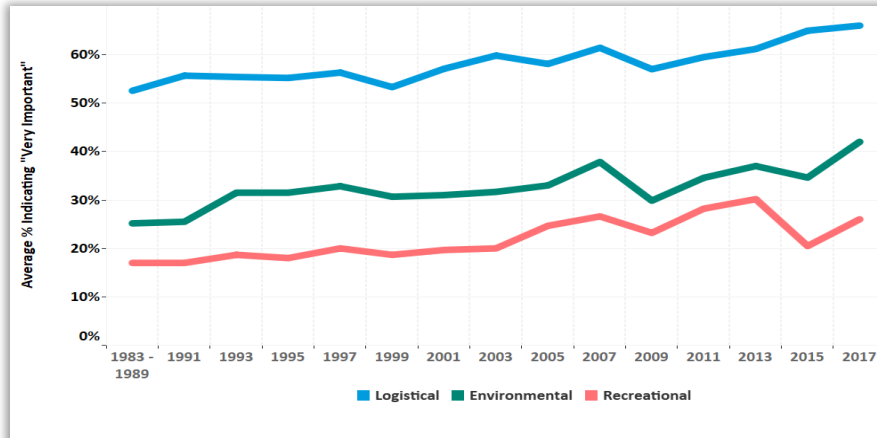
**Trade show/conference attendance is high among frequent meeting planners with IMEX, MPI and PCMA taking top billing.**

- Among meeting planners who plan seven or more meetings annually, about one-third attend IMEX followed by one-fourth attending local/national MPI and PCMA events.
- Two-thirds of all planners attend some trade show or conference but attendance is fragmented across a variety of shows and conferences with no single event dominating.

Over the past thirty years of DestinationMAP reporting, logistical considerations have always been the most important consideration when selecting a meeting site.

- Trends in meeting site selection are relatively consistent since the 1980s
- Logistical considerations are most important followed by Environmental and Recreational considerations.

**Chart 8. Trend - Consider Characteristic Important When Selecting a Meeting Site**



Over the past ten years the group hotel market has been facing increasing pressure on room rate while group hotel demand has been modest.

- Transient demand has grown 37% since 2010 while group demand has increased only 3%.
- Conversely, Group ADR has grown at three times the rate of Transient ADR

**Chart 9. 2016 U.S. Hotel ADR Segmentation: Upper Upscale/Luxury**

