



# DestinationMap

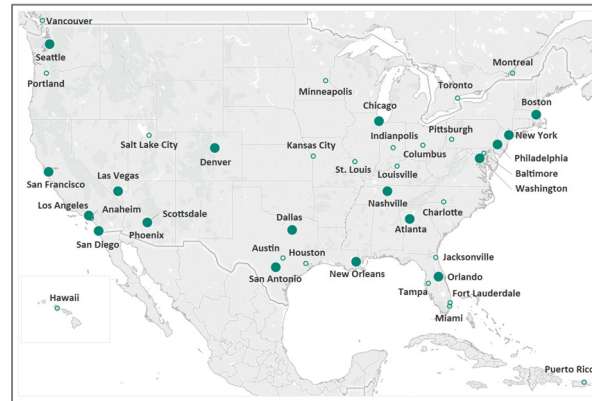
Volume 1

## Overview and Key Findings

2019 DestinationMAP is a comprehensive study of meeting planners and meeting markets in North America. The report provides detailed description of over 1,000 meeting planners' preferences and their perceptions of 42 North American markets. DestinationMAP is in its 18<sup>th</sup> publication.

This Volume 1 report provides a meeting planner perspective on the site selection process, past/future usage of markets and an evaluation of 60+ considerations when selecting a meeting destination. Volume II is a customized report focusing on the market position of a specific destination compared to competition.

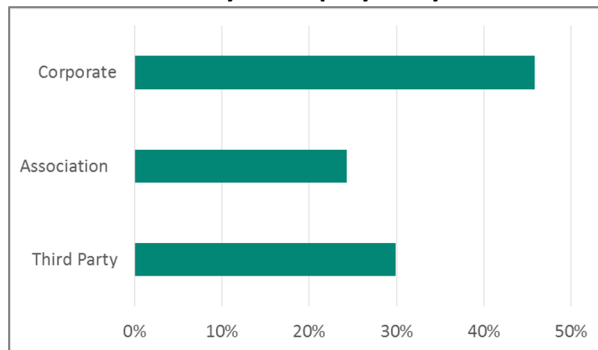
Map of DestinationMAP 2019 Markets



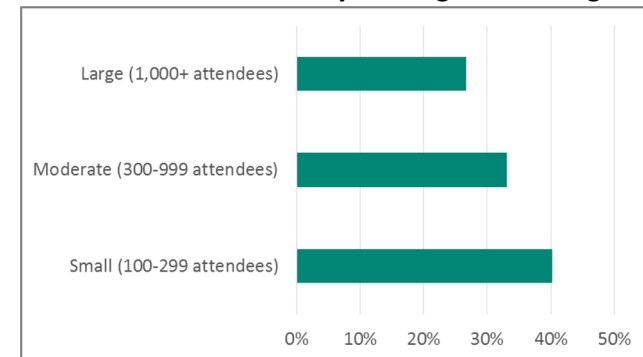
## Key Findings

**Segmentation:** Meeting planners were segmented and analyzed using two different approaches: Planner Employer Type and Largest Meeting Size. Corporate planners made up the largest Planner Employer Type segment. Small Meeting planners made up the biggest Largest Meeting Size segment.

Q. Are you employed by...?



Q. What is the size of your largest meeting?



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## Section 3: Importance Considerations

This section presents detailed information on the factors underlying meeting site selection, likely deterrents in selecting a meeting site and convention center/meeting venue site selection.

### Organization

- 3.1 General Meeting Site Selection
- 3.2 Deterrents in Meeting Site Selection
- 3.3 Convention Center/Meeting Venue Site Selection

### 3.1: General Meeting Site Selection

Meeting planners were asked to rate the importance of a set of 26 meeting site characteristics (presented in a randomized order to avoid order bias). These considerations were grouped into three categories: logistical, environmental and recreational.

- Safe environment was overwhelmingly the top consideration when selecting a meeting site followed by clean/attractive place and a series of logistical considerations.
- Recreational considerations earned lower importance ratings across the board.
- New to DestinationMAP 2019 are two considerations: “Unique/special venues available” rated very important by almost one third of planners and “Award winning restaurants” rated very important by one in four planners.

LOGISTICAL	ENVIRONMENTAL	RECREATIONAL
Availability of financial/other concessions	Casual and/or affordable dining options	Award-winning restaurants*
Convenient airline service	Clean/attractive place	Local culture/history/museums
Convention Bureau/DMO support	Climate	Nightlife
Easy for delegates to get to	Good place for attendees to bring families	Outdoor recreation
Local transportation	Popular destination	Pre and post event tourism opportunities
Moderate lodging costs	Safe environment	Unique food experience
Number of hotel rooms available	Scenic setting/scenery	Variety of things to do
Travel costs to destination	Upscale food options	
Unique/special event venues available*		
Upscale hotels		
Value for the money		

\* New in 2019

### 3.2: Deterrents in Meeting Site Selection

Meeting planners were asked to rate how likely a set of 14 meeting site characteristics would be to deter them from selecting a meeting site. This list was randomized to avoid order bias. Understanding deterrents to meeting site selection is as important as understanding positive considerations. Destinations must seek to avoid these deterrents because these are the “cost of entry” areas or the minimal criteria that a destination needs to overcome in order to even be considered as a meeting site.

- Environmental deterrents (unsanitary and unsafe) are the dominant considerations noted by almost all meeting planners.
- Cost issues, appropriateness for serious meetings, and aging hotels were also noted as deterrents by the majority of meeting planners.

COST	ENVIRONMENT	IMAGE
High hotel room costs	Unsanitary conditions	Inappropriate for serious business meetings
High F&B costs charged by venue	Unsafe environment	Social/political tension
<b>Unwilling to make financial/other concessions</b>	Aging hotels	Recent bad publicity
	Presence of panhandlers*	Nothing to do there
	Air pollution / smog*	Fading / declining popularity
	Unpleasant weather	

### 3.3: Convention Center/Meeting Venue Site Selection

Meeting planners were asked to rate the importance of a set of 22 convention center characteristics (randomized to avoid order bias). These considerations were grouped into five categories: cost, facility, location, support and tech. Almost all characteristics were rated very important by the majority of meeting planners with facilities, costs and support all capturing over three-quarters of all ratings.

LOCATION	FACILITIES	COST
Convention hotel at or near convention center	Adequate seating for largest sessions	Reasonable facility rental rates
Walkability of area around convention center/meeting venue	Adequate hotel rooms nearby	Reasonable F&B costs
Convenient offsite food options	Adequate breakout rooms	Free Wi-Fi
Proximity to airport	Sufficient exhibit space	Reasonable exhibit setup and service costs
Near downtown/activity	Attractive conference hotels	
Upscale hotels near convention center/meeting venue	Adequate seating for largest sessions	
Upscale food options near convention center/meeting venue	Unpleasant weather	
SUPPORT	TECHNOLOGY	
Helpful staff	Fast Internet / sufficient bandwidth	
Quality on-site food	State-of-the-art technology	
Labor crew easy to work with		
Menu flexibility (i.e., gluten-free, vegetarian, etc.)		