Business Events Research

Destination Decision-Making, Motivations and Barriers

VisitBritain

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1. Executive Summary

Decision-making for meeting and conference locations	
Being close to contacts of interest sets the geographical scope	Before any other factors are considered, corporate organisers typically consider where their offices, customers or prospective customers are based. They can then consider event destinations within this geographical scope. Similarly, associations typically set an initial geographical scope based on where members, expertise in their field, policy makers and/or sponsors are located.
Access is the highest priority	Within the feasible geographical scope described above, ease of access is the most important factor in destination choice. If a destination is perceived as awkward to get to, it won't 'get past go' in the decision-making. Most (77%) organisers place 'ease of access' in their top three priorities.
Suitability of venues is second	Suitability of venues is the second most important factor in destination choice. 62% of organisers place this in their top three priorities. For associations, the overall capacity can determine whether a venue is even considered. The number and capacity of breakout rooms is also very important. In addition to the above, corporate organisers may well consider whether the venue fits their brand image.
Value for money is third	Value for money is the third most important factor in destination choice. 51% of organisers place this in their top three priorities.
Subvention is a 'nice to have'	Views on subvention can largely be summed up as it is a 'nice to have'. It can sometimes sway a decision for one city over another, but more often than not, it does not seem to change the decision. However some associations expect it. The challenge for the bidding city is to discern whether a specific conference they are targeting will be swayed by a subvention or not.
Safety is becoming more important for some	Perceived safety of a destination is the most notable change in priorities. One in seven (14%) say that it is becoming more influential on destination choice. Attacks or unrest can lead to events being moved or cancelled.
How influential are agencies?	About one in five (21%) agencies interviewed in the quantitative survey say they typically have a 'significant influence' over the event

	destination decision, and about four in five (79%) say they typically have a 'partial influence'. Their level of influence varies significantly by client. When the destination decision is still open, agencies typically make a shortlist of proposals, and the client will usually choose one of the options put in front of them.
Organisers mostly rely on networks	Most (72%) organisers say that networks are their most important source of information to learn about new destinations. This is especially true of associations (93%) and corporates (80%).

Awareness and consideration of British cities for meetings and conferences	
London is very strong	London is by far Britain's strongest business event destination. 90% of organisers are aware of its business event offering, 75% have seriously considered organising an event in the city, and 57% have actually done so. London is considered and booked so much because of its perceived excellent access and it is where so many contacts of interest are located. It also has very high destination appeal.
Edinburgh	Edinburgh fares second best of the British cities. 52% of organisers are aware of its business event offering, 20% have seriously considered organising an event in the city, and 11% have actually done so.
Other cities lack awareness	Other British cities' business event offerings can be summed up as the majority of international buyers know nothing about them.

Future outlook for Britain	
Brexit – Britain on hold for some	Some organisers say that they or their clients will not consider Britain for an event until they know what will happen after Brexit. European associations in particular are less likely to come, as some depend on EU funding.
Access is critical	As access is the most important factor in decision-making, anything which can be done to improve and promote access to and around Britain is critical, especially if business is to grow outside of London.
Working together	Some say that overseas cities are better at presenting themselves as one team, with all suppliers to an event working together.

2. How and Why has this Research been Conducted?

Understanding the business events sector	This research was commissioned by VisitBritain / VisitEngland, with funding coming from two separate government initiatives: ▪ The £40million Discover England Fund, which is supporting a programme of research to ensure that funding is awarded to bids that are in line with consumer and business trends. Applicants to the fund and other interested parties were given the opportunity to suggest areas of research which would benefit their projects, and 6 out of 37 requests submitted focused on business events. ▪ The government's GREAT initiative, which funded the inclusion of a wider United Kingdom profile in this research. This research has helped VisitBritain develop its strategy for the business events sector as a part of this initiative.
What is the scope of this research?	This research focuses on business event organisers based in five key geographical markets: ▪ France ▪ USA ▪ Germany ▪ China ▪ Belgium The types of buyer organisation covered are: ▪ Corporations ▪ Agencies ▪ Associations
Preliminary desk research	Before conducting any primary research, we reviewed existing research on the business events sector in the public domain. The desk research helped us to design the questionnaire and topic guide for our primary research by highlighting factors of importance in decision-making. It also highlighted other matters of interest for us to explore further. Research in the business events sector varies greatly in its method, level of respondent bias and robustness. The contrasting findings made it necessary for us to conduct primary research tailored specifically to the needs of VisitBritain and the destination partners. As such, there is no specific write-up of the desk research, rather it aided us to conduct our own primary research.
Where has the data come from for primary research?	We compiled databases of business event organisers from the following sources: ▪ VisitBritain contacts made at international trade fairs ▪ Contacts made by destination partners: London & Partners, Visit Manchester, Visit Birmingham and NewcastleGateshead Initiative

- Union of International Associations
- IMEX, CIBTM
- LinkedIn
- Online MICE directories
- Purchased lists of business event organisers

We have conducted quantitative interviews by telephone

We have conducted 304 quantitative interviews by telephone covering mainly decision-making, awareness of British destinations, consideration for business events and rating of British destinations and key competitors on key decision-making factors.

We have conducted interviews in-house in the preferred language of the respondent. The breakdown of the 304 interviews is as follows:

Country	Corporates	Associations	Agencies	Total
France	4	13	29	**46**
Germany	14	24	48	**86**
Belgium	-	47	1	**48**
USA	51	17	28	**96**
China	5	3	20	**28**
Total	**74**	**104**	**126**	**304**

Complemented by qualitative interviews

We have also conducted 23 in-depth qualitative interviews, also by telephone, with major players in the market. In these interviews we have explored decision-making in greater depth, along with perceptions and experiences of British and competitor destinations.

We have conducted all qualitative interviews in-house in the preferred language of the respondent.

I'm looking at a percentage – where does this come from?

All percentages, numbers, charts and tables throughout the results sections of this report come from the quantitative survey. We have used the qualitative findings to explain the numerical findings through interpretative commentary and verbatims.

What are the differences by respondent type and market?

We highlight differences between the three respondent types (corporates, associations and agencies) and market wherever differences are statistically significant.

Incentive trips are very different

Incentive trips are classed as part of the business events sector, but required a different set of questions as their nature is very different from other types of business event such as meetings and conferences.

We discuss incentive trips as a standalone Section (6).

3. Conference & Meeting Decision-Making

Setting the geographical scope

3.1 Before any other factors come into play, business event organisers consider the geographical scope of where an event could feasibly take place.

3.2 Below we discuss what this means in turn for corporates, associations and agencies.

Corporates: location of offices, existing and prospective customers can override everything else

3.3 For corporates, the location of offices, their customers and prospective customers can determine the geographical scope of an event.

3.4 The reasons for this include choosing a location where many potential delegates are already based, the ability to 'reach out' to prospective customers, and the convenience of 'tagging on' extra meetings before or after the main event.

"We work with technology start-ups, so that determines where we go, i.e. where do we find the most start-ups in our industry?"
Corporate, USA

"For our corporate clients, a lot depends on where they have offices or customers. They tag on extra meetings – it just all makes so much sense."
Agency, Germany

Associations: close to 'family' or where the action is – members, expertise, policy makers, sponsors

3.5 Similar to the corporates, associations typically set an initial geographical scope based on where they have members. Some scientific associations even use the word 'family'.

3.6 As with the corporates, a destination will typically not get considered if there is no substantial member base nearby or reputation in the field, unless perhaps a destination is deliberately chosen for 'outreach'.

3.7 The potential for British cities to attract an association conference therefore depends partly on whether the city is seen as strong in their particular field, or has the potential to become strong.

"We have to consider – do we have family there? Liverpool was suggested but we thought, there's no big community in our field there. However outreach is also important. We are going to Prague in 2019 to try and attract new delegates."
Association, USA

"Above all, to ensure that the conference attracts maximum international delegates and world class presenters, the destination must be a 'science city' noted for its eminent research activity"
Association, France

3.8 On a similar note, one association has talked about the need to be in major political centres, as their aim is to influence international policy makers.

"Our primary consideration is it has to be a key media hub – big political centres. We are trying to influence policy makers, so the location needs to be well connected."
Association, USA

3.9 The location of sponsors, or the destination that the sponsor offers, can also drive the destination decision.

"We held an event in London. Our key reason for going there was our sponsor offered us a venue."
Association, Europe

Agencies: how much influence do they have over the destination?

3.10 Agencies work for corporates and associations and will consider their clients' needs, but how much influence do they have over the destination choice?

3.11 About one in five (21%) agencies interviewed in the quantitative survey say they typically have a 'significant influence' over the event destination decision, and about four in five (79%) say they typically have a 'partial influence'.

3.12 Agencies answering 'no influence' were screened out of the survey from the start, but we only came across one such case.

3.13 The level of influence varies significantly by client. When the destination decision is still open, agencies will typically make a shortlist of proposals. They are naturally more likely to put their best idea forward first, and some might recommend it over others.

3.14 Although the client makes the final decision on the destination, they often do so on the basis of the recommendations the agency puts forward. If a destination is not favoured by an agency, it won't even make it onto the shortlist, and therefore it is very unlikely to win. This is why it is still very worthwhile for DMOs and suppliers to promote themselves to agencies.

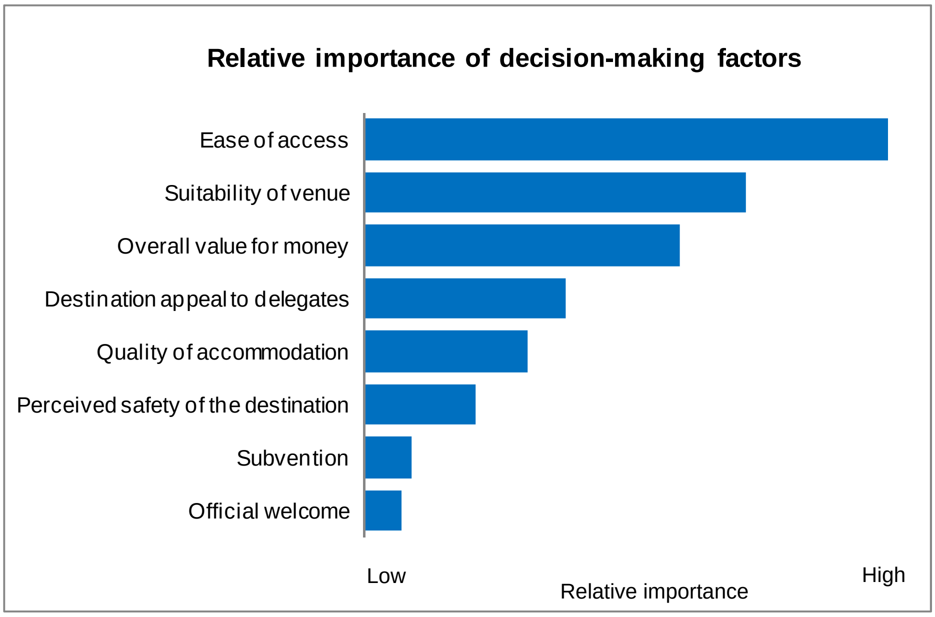
"The client makes the final decision but they decide from the shortlist that we present to them"
Agency, Germany

Further decision-making factors

Decision-making factor	% times in top 3	Total score	Rank (all)	Rank (corporates)	Rank (associations)	Rank (agencies)
Ease of access	77%	339	1	2	1	1
Suitability of venue	62%	247	2	1	2	4
Overall value for money	51%	204	3	3	3	2=
Destination appeal to delegates	37%	130	4	4	5	2=
Quality of accommodation	33%	105	5	6	4	6
Perceived safety of destination	23%	72	6	5	6	5
Subvention	8%	30	7	8	7	7
Official welcome	7%	24	8	7	8	8

We have asked respondents to rank their top 3 decision-making criteria influencing destination choice in order of importance. To calculate the 'total score' we have awarded 3 points for each first place answer, 2 points for each second place and 1 point for each third place. Knowing which factors to ask came from the depth interviews and desk research.

3.15 The chart below is based on the total score information from the above table, but presented graphically:



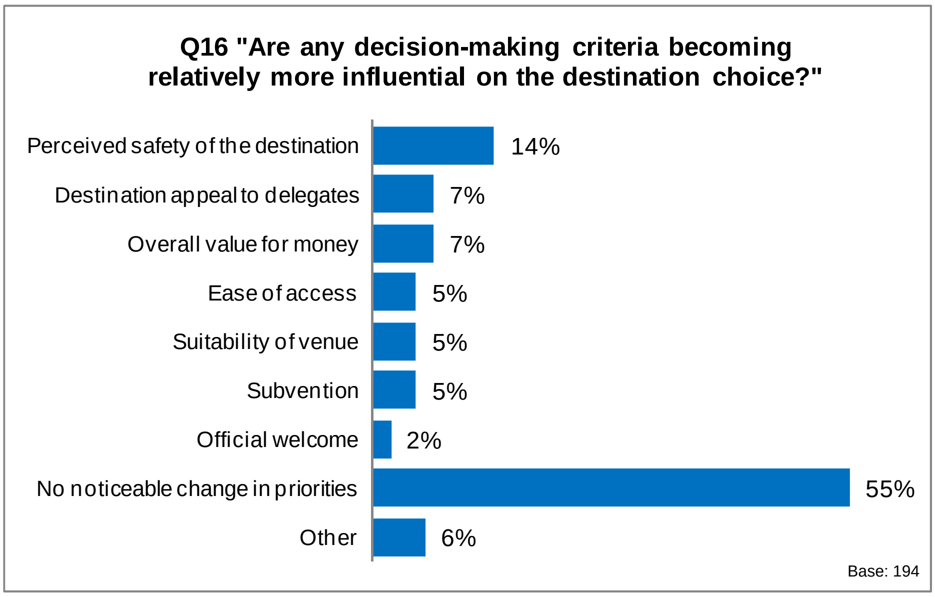
3.16 The relative importance of decision-making factors is fairly consistent across the organiser types (corporates, associations, agencies). Below we discuss significant differences between the organiser types in more detail.

Ease of access wins clearly overall	'Ease of access' is clearly the most important decision-making factor for associations and agencies (answering from the perspective of their clients), and it scores only very slightly behind 'suitability of venue' for corporates. If a destination is perceived as awkward to get to, it won't 'get past go' in the decision-making. Association conferences typically involve diverse routes of travel across Europe or the world. Attendance levels vary, and easy access for as many members as possible is a very important factor on attendance. Organisers of corporate events look for direct flights for as many delegates as possible and try to avoid destinations which involve adding on 'an extra leg' of the journey. Access is also not just about flights; it is also about the ease of getting from the airport to the city. *"How close is the venue to the airport? We can't have them travelling an extra 1 – 2 hours."* (Association, Europe)
Corporate organisers can be quite 'picky' about the venue	'Suitability of venue' is the highest ranked factor among corporates and there are numerous considerations. Some of these are very particular to the corporation in terms of the image it gives off, and the precise layout and meeting space requirements. *"We want a sophisticated venue because we are a technology company. London has lots of these, e.g. Tobacco Dock, The Brewery, so it keeps us coming back. It's important for our brand image."* (Corporate, USA)
Venue capacity	The overall capacity of a venue is an important piece of information for many organisers of association and corporate events. Organisers may be limited on what venues they could use by the total number of delegates the venue can handle. *"We need to know if the venue can accommodate 800 – 1,000 minimum. That's the first question we ask, so if a city can't accommodate us mostly in a single venue in the right place, we move onto others. Our perception in the UK is that only London can handle this."* (Association, Europe) Aside from the capacity of the whole venue, organisers may also consider the number and capacity of breakout rooms. This is important in academic conferences for example, where academics give poster presentations.

Value for money	Perhaps slightly unusual for research on decision-making, 'value for money' is only ranked third and scores some way behind the top two factors. Organisers do have to keep costs within a budget, and some know that their picky requirements on venue and access can come at a premium. This is typical of how organisers view London (discussed later).
Subvention is a 'nice to have' but more often than not seems not to change the decision	Association organisers' views on subvention can largely be summed up as it is a 'nice to have'. It can sometimes sway a decision for one city over another, but more often than not, it does not seem to change the decision. *"Subvention is a nice to have, but it wouldn't actually change where we go"* (Association, USA) However some associations expect it. The challenge for the bidding city is to discern whether a specific association conference they are targeting will be swayed by a subvention or not. Getting this wrong could mean either missing out on hosting the event, or giving away a lot of money for an event that would have come anyway. *"Subventions are expected"* (Association, France)
Subvention factors into value for money	Many associations factor subvention (or lack of) into the overall cost of the event, which itself is one of a number of factors influencing destination choice. So for them, it is less about whether a subvention is offered or not, rather how the value of it impacts on overall costs. This also explains why subvention does not rank more highly among the decision-making factors, i.e. many perceive it as part of 'value for money'. One association has commented that a subvention is more likely to impact on the destination decision for smaller conferences because it could form a significant percentage of the overall costs. *"Subventions could make a difference in the selection of one destination over another for the smaller conferences if all other elements are comparable"* (Association, France)
Subvention appears to matter more to French and Belgian based associations	The association sample divided by market needs to be treated with caution given the low base size (103), but quantitative results supported by qualitative findings suggest that subvention is more likely to matter a lot to French and Belgian based associations. Close to half (47%) of associations in France and Belgium consider subvention 'extremely important' or 'important'.

Come and shake my hand	'Official welcome' from a VIP or senior official such as the mayor ranks the lowest of the priorities in the quantitative survey. However three depth interview respondents see the official welcome as highly important and have been very critical of Britain for this. *"The Chinese think it's rude that the deputy mayor won't come and shake their hand and say thank you for taking the time to come and visit our city, because in China that's what would happen. This is the biggest thing that needs to change in Britain."* (Agency, China) *"London is one of the only cities which doesn't make this kind of welcome. Maybe they just think they're so popular they don't need to. We've had very high profile people speaking at our events in other countries ... but the London Mayor's office didn't even make an alternative suggestion. It's a bit rough … when we've been committing to London for the last three years."* (Corporate, USA)

Change in priorities



Safety is becoming more important for some

3.17 Many (55%) respondents say that there is no noticeable change in decision-making priorities at the moment. However, safety is the most noticeable change among all organiser types (corporates, associations, agencies).

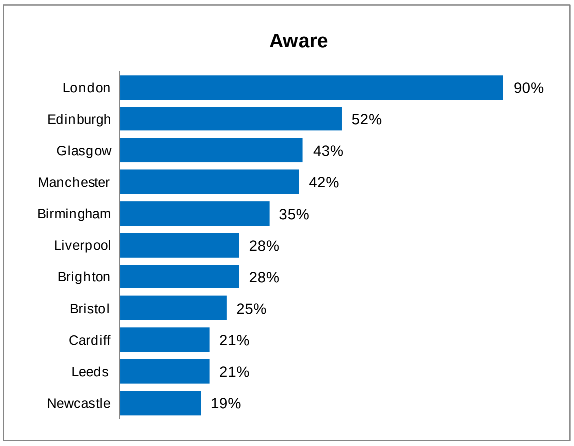
Attacks or unrest can lead to events being cancelled or moved	The unpredictable nature of terrorism and the threat of it means that destination decisions can change last minute. American organisers are more concerned over safety than European organisers. *“The safety aspect is getting more important because of what is going on in the world”* (Corporate, USA) Brussels, Paris and Istanbul have all been mentioned as destinations which have had events cancelled or moved due to terrorist attacks or civil unrest. *“We will not go to Paris for a few years because people don't see it as safe”* (Association, Belgium) *“We have just cancelled an event in Istanbul. Safety is more important than ever.”* (Association, Germany)
Business as usual for some though	In the depth interviews, some respondents have said that delegates are well-travelled internationally, and to some extent they all have to ‘get on with business’ rather than always fear where terror might strike next.

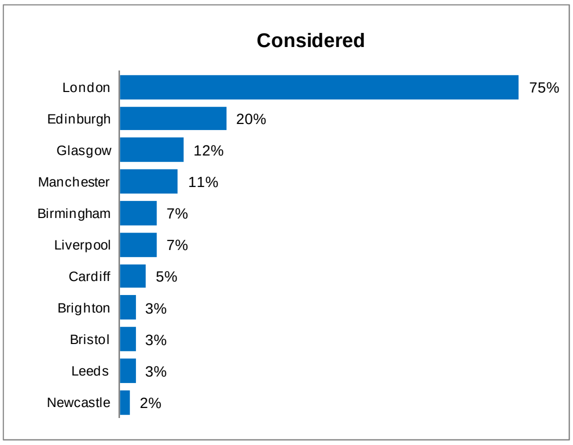
4. Awareness and Consideration of British Cities for Conferences & Meetings

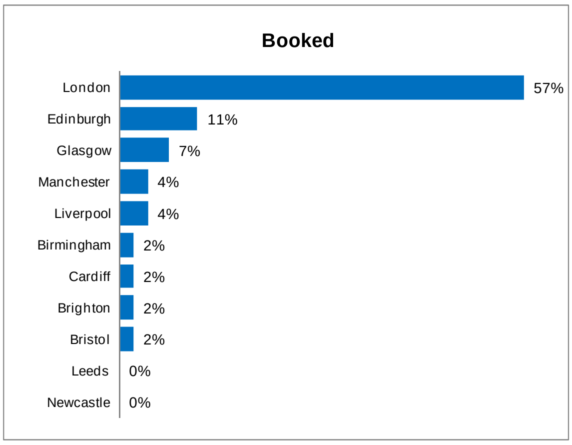
4.1 For each of the eleven key British cities below we have asked respondents:

- Whether they know anything about the city's business event offering ('Aware')
- If they know anything about the offering, then whether they have seriously considered organising an event in the city ('Considered')
- Whether they have organised an event in the city ('Booked')

4.2 Below we show the % of respondents remaining in the sample at each stage of the funnel. The sample base for all cities is respondents who have ever booked or considered organising an event in Britain: 122 (63%) of the 194 conferences & meeting sample.







London by far Britain's strongest business event destination

Awareness, consideration and bookings in London are high across all organiser types and markets.

London is considered and booked so much because of its perceived excellent access and it is where so many offices,

	customers, prospective customers, members and other contacts of interest are located. It also has very high destination appeal. We discuss this further in Section 5.
Edinburgh fares well; most other British cities lack awareness	Edinburgh's business event offering is fairly well known, but most other British cities suffer from very low awareness internationally. As a result of knowing little about their business event offering, few overseas organisers have used them. Yet when an organiser does hold a business event in Britain outside of London, the feedback is usually very positive. *"I have nothing but praise for Manchester. The liaison between Marketing Manchester and the University was excellent."* (Association, France)

Why is Britain not considered by some?

4.3 Some (37%) conference & meeting organisers have never seriously considered Britain. We discuss the main reasons below.

You haven't invited us	Associations choose some of their conference destinations based on individual countries/cities bidding to host, or a member country inviting everyone over. Some associations are open to having an event in Britain but they haven't been invited, or British cities have not bid. *"Members haven't invited us ... If we had an invitation to the UK then we would look at it of course."* (Association, Belgium) *"No idea. We have not been invited."* (Association, Belgium)
Corporate organisers generally open to Britain	Corporate organisers who have not seriously considered Britain yet are generally not against the destination – it just hasn't necessarily fit in with corporate plans yet. *"Haven't considered it yet but we are generally open though"* (Corporate, Germany)
Some American corporates staying closer to home	For some American corporate organisers, the company policy at the moment is to stay closer to home or use video-conferencing as an alternative to face to face meetings. *"We use video-conferencing, webinars instead"* (Corporate, USA) *"We usually go to Canada as it's quite close to our location. I am currently trying to convince the other management that*

	we should hold a conference somewhere else and Britain would be a lovely choice." (Corporate, USA)
Agencies being led by clients	If an agency has not seriously considered organising an event in Britain, it is usually because they are particularly client-led, and Britain has not been requested. *"It is all dependent on what the client wants. If they want us to organise an event in Britain then we will."* (Agency, USA)

5. Rating of British Cities and Competitors for Conferences & Meetings

5.1 We have asked respondents in the quantitative survey to rate five cities on three decision-making factors important to them (in the interests of keeping the interview to an acceptable length).

5.2 We have always asked respondents to rate London, and if they are aware of any other British cities' offering then these have been prioritised for selection over the four overseas cities included for rating (Paris, Barcelona, Berlin, Dublin).

5.3 Due to the low awareness of British cities' business event offering except for London, the sample size for some of the ratings is insufficient.

5.4 Below we show the average scores out of 5 for the most important decision-making factors for cities where sample sizes are adequate.

5.5 The highest score for each factor is highlighted in green and the lowest score is highlighted in red.

	Ease of access	Suitability of venues	Value for money	Destination appeal	Quality of accommodation
London	4.7	4.5	2.6	4.5	4.4
Edinburgh	3.6	4.1	3.3	4.1	4.2
Glasgow	3.2	*	*	3.8	*
Manchester	4.0	4.1	3.6	3.1	*
Birmingham	3.9	4.4	*	3.3	3.5
Paris	4.6	4.5	3.0	4.3	4.2
Barcelona	4.3	4.4	4.2	4.3	4.3
Berlin	4.4	4.4	4.1	3.8	4.3
Dublin	4.0	3.8	3.7	3.9	4.2

* sample size insufficient

Ease of access – London outstanding, but most other British cities perceived as awkward to get to

As ease of access is the overall most important decision-making factor, for a city to 'get past go' for business events, it must score well on this.

London is praised for its outstanding ease of access. Even compared to other major European capitals with large airports, London is seen as having the edge because it has many airports and therefore offers greater choice.

This is one of two key reasons why London performs so strongly in the meetings & conferences market – the other reason being the substantial presence of companies and

	contacts of interest in the city. *"There are 4 or 5 airports in the London area. That's very helpful for getting people in."* (Corporate, USA) *"Above all else, London's advantage is its access – even compared to other capitals because of its multiple airports"* (Agency, Germany) One of the main reasons why other British cities are not picking up more business events, apart from the lack of awareness of the offering, is that they are perceived as awkward to get to. If organisers don't know how to get somewhere, they seem to jump to the conclusion that it is awkward to get to. This may seem harsh, but it is the reality that most British cities face. *"Access to the secondary cities is awkward … actually I don't know that, but that's my perception"* (Agency, Germany) *"I'm open to cities outside London but I need convincing they are easy to get to from other countries. I don't think they are."* (Corporate, USA)
Venues – London well rated; other British cities score well but more organisers need to know this	London is perceived as having a diverse range of venues, and organisers know they should be able to find one which suits their needs. Some comment that London can combine an offering of 'super modern' venues with historic attraction – something which few other cities can do. *"London is really rare in that it can deliver very well both on modern venues and also have the historic attraction."* (Agency, Germany) Birmingham (4.4), Edinburgh (4.1) and Manchester (4.1) are all well rated on venues by organisers who know enough to give them a rating. *"The conference centre in Edinburgh is lovely and super high tech"* (Agency, USA) It is a missed opportunity therefore that more organisers do not know about them because there is a perception among some that these 'secondary' cities do not have large or suitable enough venues to cope with their needs.
Value for money – London rates poorly	London averages 2.6 out of 5 on value for money – well behind most of its competitors. In the depth interviews, most respondents have criticised London for being very expensive. The fall in the value in the pound since the referendum has 'eased the pain' a little.

	"In Madrid, Lisbon and Amsterdam we can get the same for about 30% cheaper." (Agency, USA) *"Since Brexit it's better, but it's still really expensive"* (Germany, USA) Yet in spite of the perception of high costs, London is still widely used as a destination. It seems that the benefits of access and being 'where the action is' are often considered worth paying for. Some organisers suggest that other British cities have an opportunity to win business when there is a strong case for coming to Britain but London costs are seen as prohibitive. Organisers would need convincing that the city has the right venue to 'handle' the event, that the access is easy and the right kind of contacts are based in the city. *"If we were looking for a more traditional conference, there would be more attractive options outside London as the costs are lower, but the driver is the audience we're reaching so it's currently not an option"* (Association, USA) Barcelona (4.2) and Berlin (4.1) appear to be key cities to benchmark value for money against.
Destination appeal – London and Scottish cities strong; other British cities lack appeal	London ranks highest on destination appeal. Organisers describe the city as 'one of the world's great capitals' which needs no introduction. The diversity of history and culture gives it 'something for everyone', and this can also encourage trip extensions. *"It's London, right? It's one of the world's great capitals."* (Agency, USA) *"There's nothing else like it. Best place in the world for culture, museums, art galleries, experiences bar none, incredible."* (Agency, USA) Edinburgh and Glasgow are quite well rated on appeal. Scotland is perceived a bit differently to the rest of Britain, with its strong cultural identity. *"Edinburgh is well known. They managed to get into the Chinese psyche 10 – 15 years ago."* (Agency, China) Birmingham (3.3) and Manchester (3.1) do not score highly on appeal. The limited feedback on other English cities is similar, except Liverpool. *"Manchester isn't seen as attractive as other cities like Liverpool, and Glasgow. I don't know why."* (Agency, Europe) *"Birmingham is not well known internationally. Everyone has heard of Liverpool because of the Beatles."* (Agency, Europe)

6. Incentive Travel

6.1 Incentive travel is based more on broader regions of countries rather than specific cities, and the decision-making criteria are slightly different. Therefore we have handled this type of business separately in the survey.

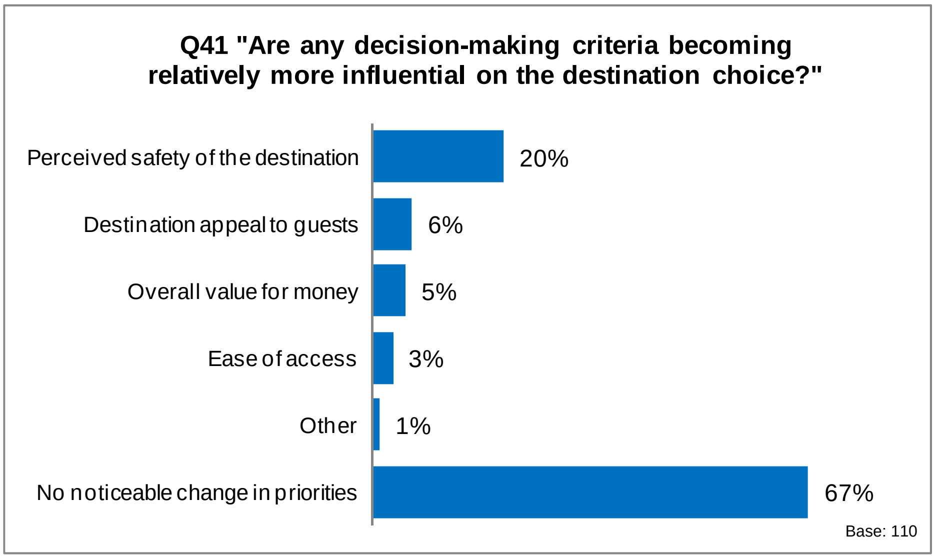
6.2 The sample (110 interviews) comprises corporates, and agencies which work for corporates; therefore we present the results as a whole.

Decision-making factors

Decision-making factor	% times in top 3	Total score	Rank
Ease of access	69%	170	1
Destination appeal to guests	56%	138	2
Quality of accommodation	65%	131	3
Overall value for money	49%	105	4
Perceived safety of destination	33%	60	5
Climate	14%	29	6

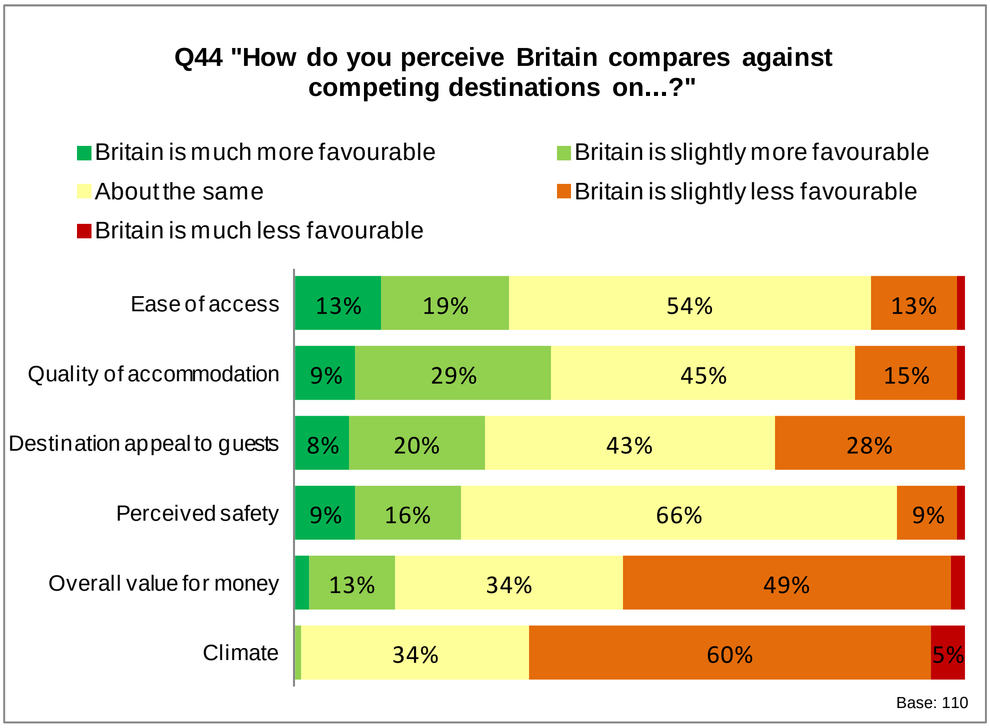
Ease of access again	Incentive travel is a different type of business from meetings and conferences, but 'ease of access' is still the most important decision-making factor. Organisers don't want to start what is supposed to be a pleasurable trip by giving the guests an awkward journey.
Destination appeal is more important for incentive trips	As incentive trips are about pleasure not work, destination appeal plays a prominent role in the decision-making. Agencies in particular are under pressure to come up with new and exciting suggestions.
Quality of accommodation	Similar to destination appeal, the accommodation becomes more important in the decision-making when the focus of the trip is on pleasure.

Change in priorities



Turkey and North Africa becoming more avoided	One in five (20%) incentive trip organisers say that the perceived safety of the destination is becoming more important. Concerns are shared across organisers based in different continents. Turkey and North Africa have been mentioned a lot as destinations to avoid. *"We have cancelled all incentives to Turkey and North Africa and we are very aware of recent events in Europe"* (Agency, Germany)
American perceptions of Europe	Some American travellers are becoming reluctant to travel to Europe, or even leave the perceived sanctuary of their home country. *"It's very scary at the moment and people don't want to leave the USA"* (Corporate, USA) Yet some agencies point out that the effects of terrorism coverage in the media are short-lived. *"Every time a bomb goes off in Europe, Britain comes off the list. Anything that is front and centre in the media has an immediate impact, yet if you go back and speak to them two weeks later, they'll have forgotten all about it."* (Agency, USA)

Awareness and perceptions of Britain



Britain fares fairly well on the factors which matter most	On balance, Britain fares slightly favourably compared to competitors on the factors of access, accommodation and destination appeal. This is a positive finding because these are the top three decision-making factors.
Value for money is weak, although this may be influenced by perceptions of London	Only 15% of organisers see Britain as better value for money than the competition, whereas 51% see it as less favourable. This can sometimes result in another destination being chosen when Britain was being seriously considered. This is usually when London was the region being considered. *"We went to Portugal instead because it was cheaper and we knew the destination better"* (Agency, France)
Climate rules Britain out for some types of trip	If a warm, sunny destination is desired, then Britain is a non-starter. However, fortunately for Britain, climate is only a top 3 factor for the minority (14%) of respondents.

Perceptions of the regions

London is very appealing for its diversity	London is perceived as a highly appealing incentive destination with its rich history and attractions combined with more modern offering such as shopping. It is an iconic capital city with global appeal. *"We did a basic weekend with an individual programme: London Eye, city trip, pub and a ship cruise. Our participants loved it."* (Agency, Germany) Access is the most influential factor in decision-making, and London is perceived as excellent for this.
Less known about other parts of England	Organisers are less clear on what other parts of England have to offer for incentive travel. However, satisfaction can be high when other parts of England are visited. *"I try to get clients to go to Bath, Canterbury and Stratford … they are totally besotted and in love with it when they go outside of London."* (Agency, USA)
Scotland – rich in culture	Some perceive Scotland as a strong destination for leisure, especially German organisers. Its rich culture and strong national identity make it an attractive choice for incentive trips. *"Edinburgh and the surrounding countryside has some 'incentive character'. You can play golf, go and visit the highlands."* (Agency, Germany)
Wales is less known	Much less is known about Wales than the other regions of Britain. As such, feedback is very limited. *"Great location for outdoor activities but awful infrastructure"* (Agency, Germany)

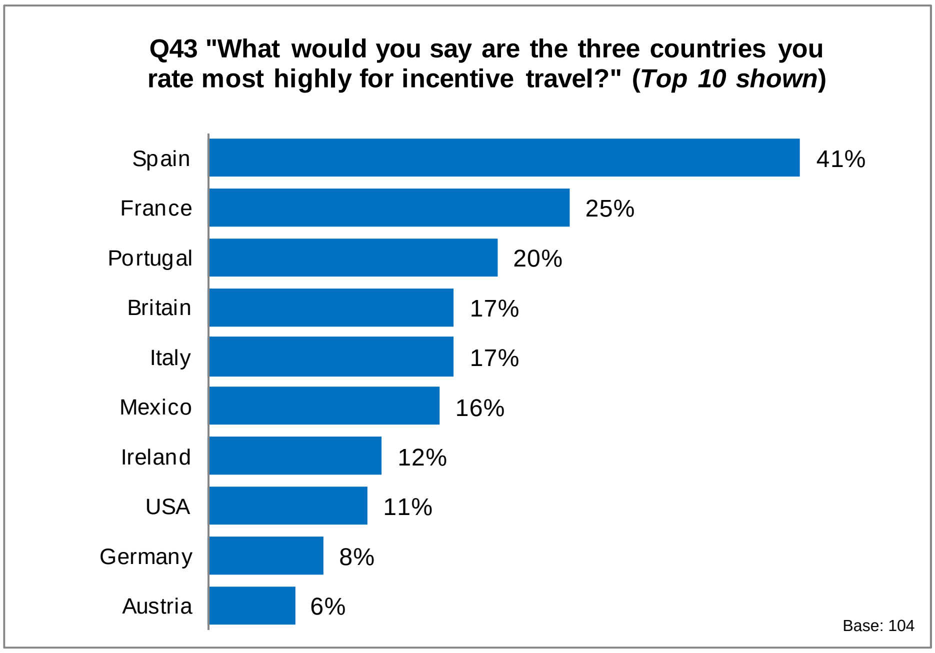
Why is Britain not considered by some?

6.3 About a third (35%) of organisers have never seriously considered Britain as an incentive destination. We discuss the main reasons below.

Preferring warmer climates	Some organisers or their clients prefer sending guests to warm and sunny destinations. If this is important, then Britain stands little chance of being considered. *"It's difficult to sell Britain for incentives because people usually prefer warmer countries"* (Agency, Germany)
Don't get asked for it	Some agencies are led by what their clients ask for, and if Britain is not asked for then they won't try and push it.

	"We would love to send people to Britain but our clients usually don't ask for it" (Agency, Germany)
Distance can be off-putting for some Americans	Some American organisers prefer Mexico and the Caribbean to sending their guests on long haul flights. *"Britain always gets shot down as an idea because it takes so long by plane"* (Corporate, USA)

What are the most popular incentive destinations?



Sunny southern Europe	Sunny countries in southern Europe such as Spain, Portugal, Italy and France (if south of) are the strongest destinations for incentive travel. However, Britain's offering is perceived as different, and it fares well against its perceived competitor set including Ireland and Scandinavia.
Americans flock to Mexico	Mexico comes out clearly on top for American organisers – 44% place it in their top three incentive destinations.

7. Information Sources

7.1 This Section covers the information sources used by all types of business event organisers to learn about new destinations.

Organisers mostly rely on networks	Most (72%) organisers say that networks are their most important source for learning about new event destinations. This term broadly encompasses colleagues, associates, agencies, members (of associations) and internal databases. *"We invite our members to suggest ideas for destinations"* (Association, USA)
Agencies are perhaps the easiest to reach	Agencies are clearly much more active in using different information sources than corporates and associations. Whereas nearly all (93%) associations and most (80%) corporates single out networks as their most important source, only half (50%) of agencies do. Agencies are also much more likely to use more than one source. It is their job to know about many different destinations because they have numerous clients with different needs. As such, this type of organisation is perhaps easier to reach. 14% of agencies single out tradeshows as their most important source, 7% say fam trips, 6% say networking events & conferences and 5% say national convention bureau / DMC website. *"Our agency has a combination of sources. I really like using convention bureaux, IMEX for making and maintaining contacts, the internet also."* (Agency, Germany) *"Attendance at trade fairs can sometimes provide starting points for working relationships with tourist boards and suppliers"* (Agency, France)
And other types of organiser may rely on the agencies	Agencies are expected to have good knowledge of different destinations and their expertise in the field is trusted. *"We rely a lot on one particular agency who do our venue sourcing. That's probably our main source."* (Corporate, USA)
All types of organiser are open to being approached by new destinations	All types of organiser (corporates, associations, agencies) say they are open to being approached by new destinations. *"We are always open to hearing from lesser known destinations about what they have to offer"* (Agency, Germany) *"We have no 'go to' sources. We can't keep up to date with everything that's going on, so it's very valuable to be approached by destinations."* (Association, Europe)

	Some associations sit back and expect to be approached by bidding cities. *"It's up to cities to approach us and provide an interesting and attractive proposal"* (Association, France)
But cutting through the 'noise' is a challenge	Although organisers are open to being contacted, they do get bombarded with information and so the challenge is to stand out from what some describe as 'noise'. *"It's about marketing and spending the money. Maintaining the attention span of anyone is a huge feat – there's a lot of noise out there"* (Agency, USA) Doing some research first before approaching an organiser can help earn their respect. *"Don't come to this market if you don't know what North Americans want. Talk to me when you already know what the market wants. You would be shocked how many don't."* (Agency, USA)