



Business Events Research

Summary of Destination Decision-Making by International Event Buyers

VisitBritain

1. How and Why has this Research been Conducted?

Understanding the business events sector

This research was commissioned by VisitBritain / VisitEngland through the Discover England Fund and the UK Government's GREAT initiative to inform strategy.

Quantitative interviews by telephone

We have conducted 304 telephone interviews with international business event organisers: 74 corporates, 104 associations and 126 agencies. The five markets covered are: France, Germany, Belgium, USA and China.

Complemented by qualitative interviews

We have also conducted 23 in-depth telephone interviews with major players – a mixture of types and markets.

Where do the percentages come from?

All percentages, numbers, charts and tables come from the quantitative survey. We have used the qualitative findings to explain the numerical findings through commentary and verbatims.

This is only a summary

This report summarises the key findings. A more detailed report can be found here: <https://www.visitbritain.org/business-events-research>

2. Conference & Meeting Decision-Making

Setting the geographical scope

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

Corporates: location of offices, existing and prospective customers

"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..."
Agency, Germany

Associations: close to 'family' or where the action is

Considerations include members, expertise and policy makers.

"We have to consider – do we have family 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

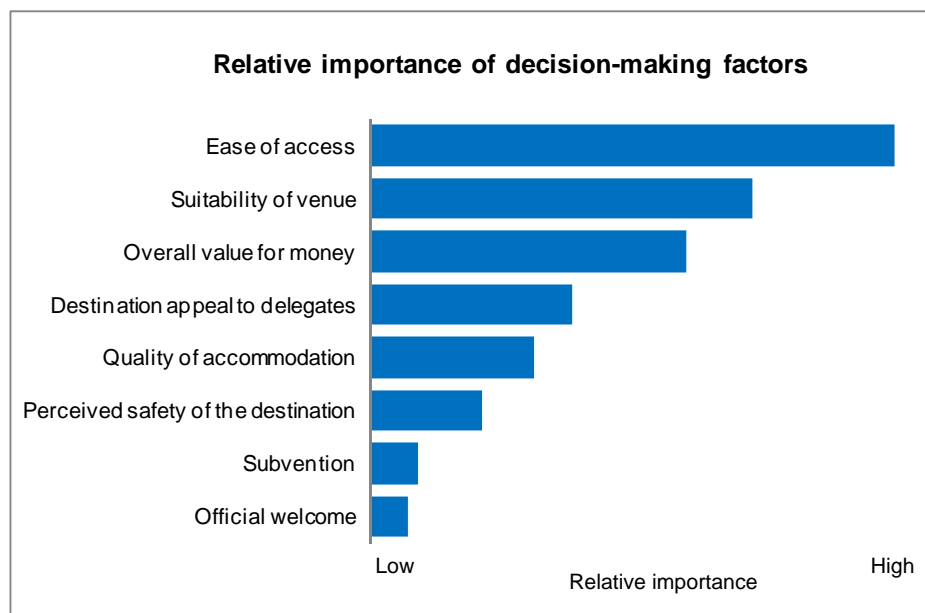
Agencies: how influential are they?

About one in five (21%) agencies 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 those options.

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

Further decision-making factors



The full published report contains detail on how we arrive at the relative importance of decision-making factors

Ease of access wins clearly overall

If a destination is perceived as awkward to get to, it won’t ‘get past go’. Corporate organisers try to avoid destinations which involve ‘an extra leg’ on the journey for as many delegates as possible.

Association conferences typically involve diverse routes of travel – ease of access is an important influence on attendance levels.

Access is also about the ease of getting from airport to 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

There are numerous considerations concerning venue suitability, including: the image it gives off, precise layout, meeting space requirements, overall capacity and technology.

Venue capacity Overall capacity is an important piece of information, especially for large events. But organisers may also need to consider the number and capacity of breakout rooms.

Value for money Perhaps slightly unusual for research on decision-making, 'value for money' is only ranked third. 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.

Subvention is a 'nice to have' Views on subvention can broadly 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 conference they are targeting will be swayed by a subvention or not.

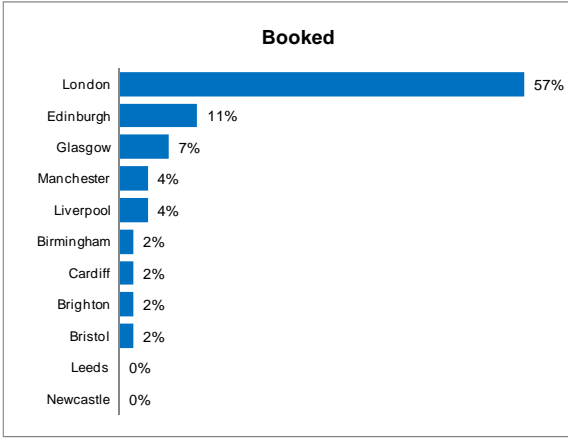
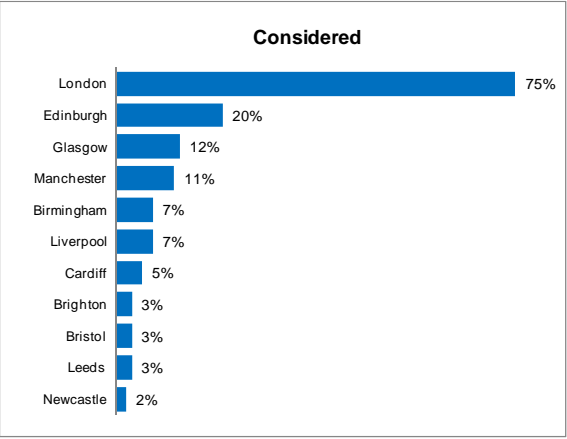
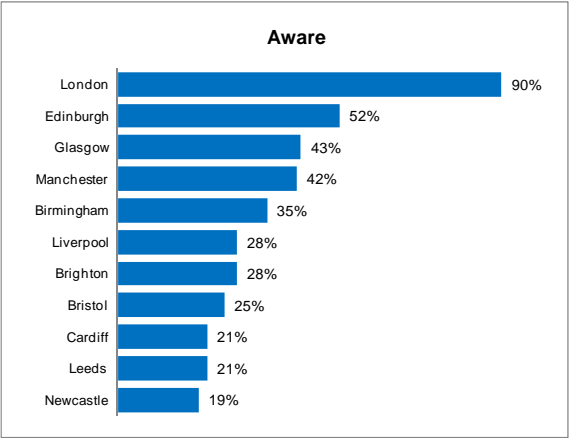
Subvention factors into value for money Many associations factor subvention (or lack of) into overall event cost. This may explain why subvention does not rank more highly in decision factors – i.e. many perceive it as part of 'value for money'.

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

Purchase funnel explained For eleven key British cities we have asked respondents:

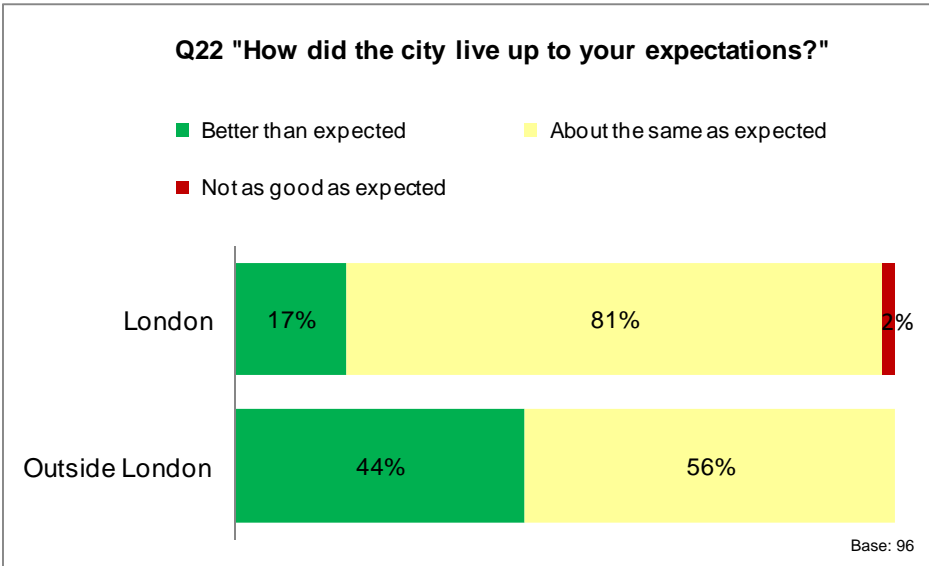
- Whether they know anything about the city's business event offering ('Aware')
- If they know anything about the offering, then whether they have seriously considered organising an event in the city ('Considered')
- Whether they have organised an event in the city ('Booked')

Base of respondents 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.



Edinburgh fares well; most other British cities lack awareness

Most British cities have low awareness internationally. Yet when an organiser holds a business event in Britain outside of London, experience very often exceeds expectations.



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

Av. score out of 5 by city	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

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

Ease of access – London outstanding, but most other British cities 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. Along with lack of awareness of the offering, this is one of the most significant factors holding back British cities outside London.

"Access to the secondary cities is awkward ... actually I don't know that, but that's my perception"
Agency, Germany

Venues – London well rated; other British cities score well but more organisers need to know this

Some comment that London can combine a rare offering of 'super modern' venues with historic attraction.

Birmingham, Edinburgh and Manchester are well rated on venues by organisers who know enough to rate them.

"The conference centre in Edinburgh is lovely and super high tech"
Agency, USA

Value for money – London rates poorly

Yet in spite of the perception of high costs, London is still widely used as a destination. Benefits of access and being 'where the action is' are often considered worth paying for.

Other British cities have an opportunity 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 offering however.

5. Meetings and Conferences: Conclusions

Understand which factors matter most

- Improving and promoting access is vital
- Key venues should be at the forefront of a city's offering

Work as one team and play to the city's strengths

- Organisers appreciate a city presenting itself as one team
- A city needs to decide which types of event to target – organisers tend to go where their field is well represented

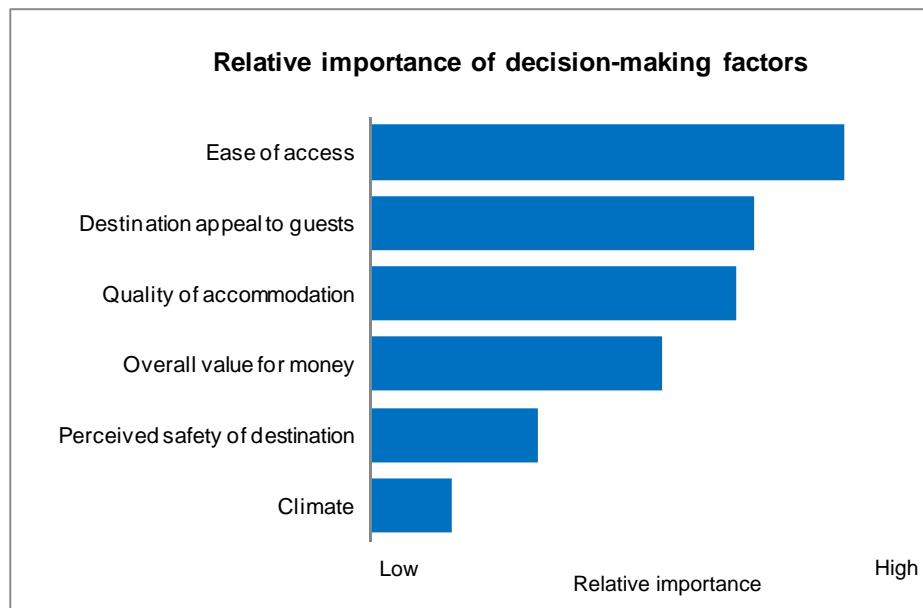
Raise awareness

- Experience of events held outside London often exceeds expectations but awareness of the offering is low
- Get into buyers' networks – personal contact matters

Some factors need to be understood case by case

- Need to determine whether subvention will actually sway the decision
- Official welcome can matter a lot, especially to the Chinese

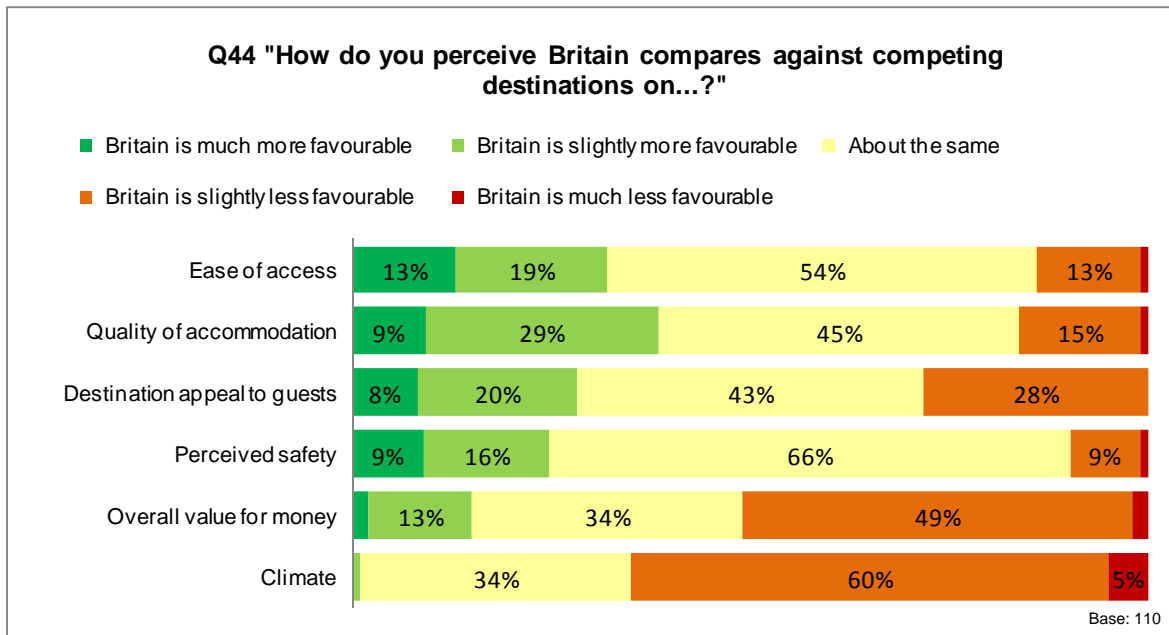
6. Incentive Travel



The full published report contains detail on how we arrive at the relative importance of decision-making factors

Destination appeal becomes more important for incentive trips

As incentive trips are about pleasure not work, destination appeal and quality of accommodation play a prominent role in the decision-making. Agencies in particular are under pressure to come up with new and exciting suggestions.



Promote the factors which matter most

- Access, accommodation and destination appeal are the top three factors for incentive trips – Britain has a slight perceived advantage in all three

Improve value for money perception

- Britain's value for money is perceived unfavourably – organisers need to know about the offering outside London

Understand when the weather matters less

- Some incentive trips are drawn to warm, sunny climates – Britain's opportunity is when Northern Europe is considered

Individual regions

- London and Scotland (strong cultural identity) currently have a perceived attractive offering for incentive trips
- Trips to other parts of England and Wales receive positive feedback but awareness needs to improve

7. More Information?

- For a more detailed report: <https://www.visitbritain.org/business-events-research>
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