



2016 Meeting Planners Study

Prepared by



H2R
MARKET RESEARCH

Project Overview

PURPOSE

The purpose of the Springfield-Branson 2016 Meeting Planners Study was to provide a measure of the perception of both Springfield and Branson in the meeting planner market space. This study was conducted in a similar manner to the 2013 Meeting Planners Study and comparisons have been made where applicable.

TARGET AUDIENCE

The 2016 Meeting Planners Study was conducted among meeting planner prospects for the Springfield and Branson CVBs. The research was conducted in December 2016 to remain consistent with the 2013 study and to avoid any timing bias.

SAMPLE

A total of 255 respondents were interviewed in this study which provides for a maximum margin of error of +/-6.1% at a 95% confidence interval.

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Executive Summary

Meeting Planner Influencers

- Most professional meeting planners rely primarily on the past experience of their conference attendees (71%) for inspiration on new meeting destinations. This number increased from 62% in 2013 and will likely continue to be a top contributor for the foreseeable future. Meeting planners want to reduce the risk of disappointment for their clients, and planning meetings in destinations their clients suggest helps ensure meeting attendee satisfaction.
- Some meeting planners also use online searches (46%), social media (20%) and even trade publications (online and print - 20%) for inspiration. Online search terms are most likely to include “CVB,” “Hotel,” and “Convention Center.” So, ensuring that the sites that populate when meeting planners are searching these terms in your area is important.
- And, while many visit social media (20%), they aren’t just using it to talk to their friends (76%). Even more are visiting destination pages (88%). Therefore, ensuring a good social media presence is also important for reaching meeting planners.



In-Person Meetings are Most Influential

- The *most* influential sources for meeting planners continue to be past attendees, sales representatives and FAM Tours/site visits. However, these sources each saw a significant* decline in influence compared to 2013. This decline may be explained by the need to eliminate risk by relying on others for influence. Relying on meeting planners' own experience can keep the risk at a manageable level.
- Additionally, meeting planners have a much smaller voice in the decision making process than before (-9 points). This year, boards/site selection committees saw a significant increase in the decision making process (+16 points).
- Finally, in-person meetings are still very influential for meeting planners and their decision making process. Nine in ten (91%) indicated in-person meetings were at least somewhat influential, while site visits (99%), FAM Tours (80%) and virtual tours (71%) also help.

**The term significant throughout the presentation refers to a variance that is beyond the margin of error.*



Springfield & Branson Perform Well

- Meeting planners indicate that the most desirable destination attributes include affordability (91%), safety (84%) and ease of navigation (79%). Branson and Springfield both perform well in the areas of affordability and safety, making these strengths for both destinations.
- Branson stands out for its nightlife and entertainment/variety while Springfield is best known for its value compared to other destinations.
- However, Branson also has an unmet need of not being particularly easy to navigate, while meeting planners to Springfield wish there was more variety and more hotels within walking distance of the meeting spaces.
- Branson (38%) and Springfield (33%) both earned good Net Promoter Scores, on par with the H2R Industry Norm for meeting planners of 37%.



Bookings Have Increased

- Both Branson (91%) and Springfield (82%) have a high level of familiarity among meeting planners. Additionally, the market potential* among these prospects is comparatively strong at 60% and 51% respectively (and ranking 3rd and 4th in the competitive set).
- Meeting planners who said they have booked in each destination increased since measured in 2013 (Branson +5% and Springfield +7%), while meetings booked in Kansas City (-3%) and St. Louis (-11%) both declined. Openness to booking in Branson reached 50% and 41% in Springfield. This, however, is lower than Kansas City and St. Louis (55%), but is similar to what we've seen in the past.
- Those uninterested in planning meetings in either destination cite navigation to, from and around the cities as one of their top detractors, along with a lack of information on these destinations. Branson has a unique concern among meeting planners for being perceived as not having the airlift to accommodate meetings that aren't regional in nature. Springfield also has a unique concern—meeting planners don't believe the city's facilities can accommodate large meetings.

**Market potential is the combination of considerers, lapsed bookers and recent bookers.*



Thoughts to Consider

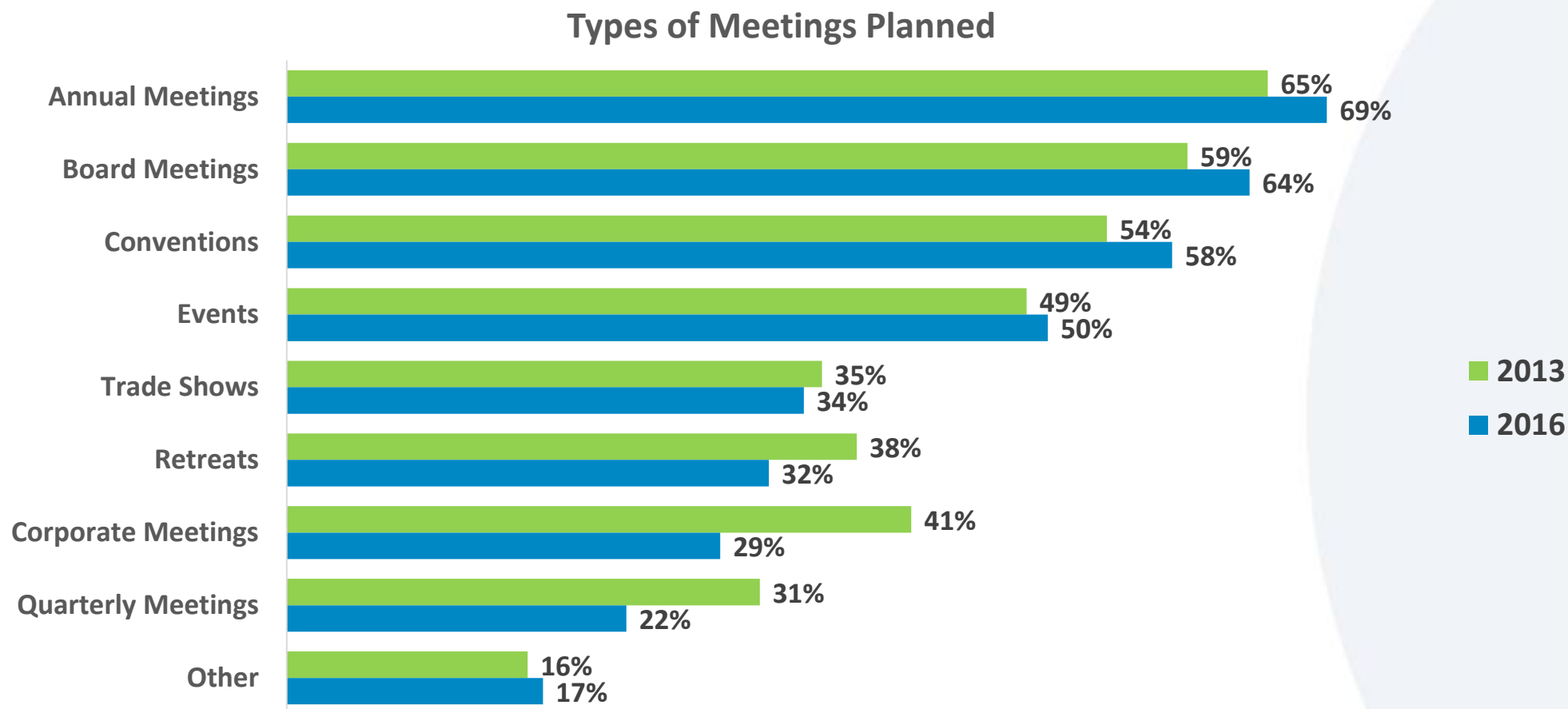
- **Cater to meeting planner needs—or add more features.** To improve one's ranking in meeting planners' consideration sets, each destination might consider either reaching out and finding more meeting planners like the ones already booking in their destination, or find ways to add features, space and airlift to accommodate larger meetings. Branson and Springfield are both considered a second-tier city to meeting planners. So, if they are planning a large meeting that is easy to get to, Springfield and Branson do not top the list of destinations they consider. There are likely more meeting planners out there that Branson and Springfield could accommodate, but they just don't have the information necessary to make the leap. Both destinations had meeting planners who mentioned they didn't have enough information about the area to book.
- **Continue to use a multi-channel platform across meeting planners' paths to purchase.** Meeting planners continue to use a variety of sources to inspire them and ultimately choose destinations for their meetings—similar to what we saw in 2013. Relationships matter most, and therefore it is extremely important that both Springfield and Branson CVB's leverage their sales representatives and the relationships they have with meeting planners. Additionally, meeting planners seek inspiration in a variety of ways, so intercepting them at the right time, with the right message in the right place is just as important.

Meeting Planner Landscape

- + *Types of Meetings Planned*
- + *Inspiration for New Destinations*
- + *Search Terms Used*
- + *Social Media Usage*
- + *Trade Publication Usage*
- + *Most Influential Sources*
- + *Primary Decision Makers*
- + *Communication Preferences*

01

The planning of corporate meetings are down across the board while conventions, annual meetings and board meetings have increased.

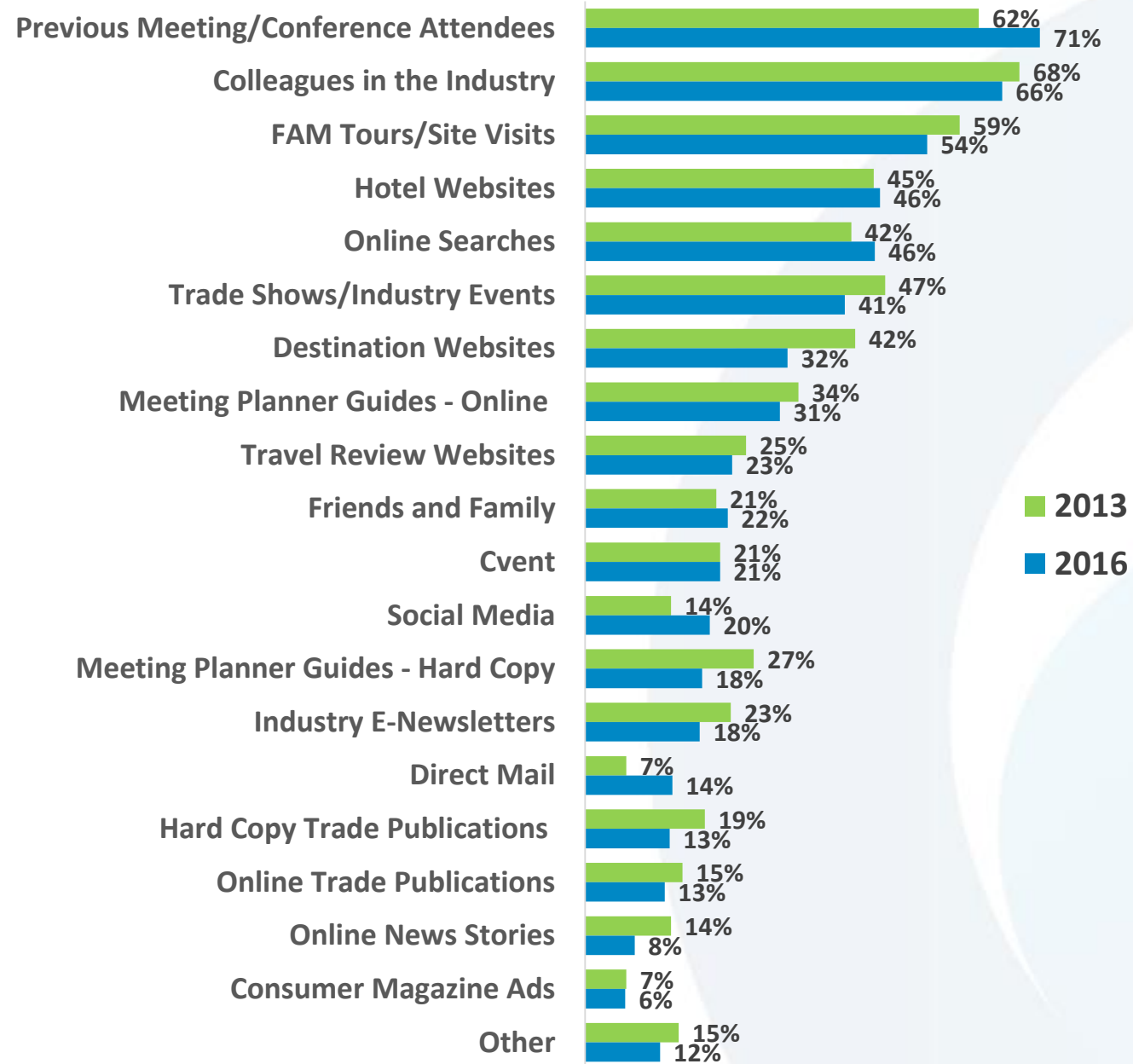


Q3: Which of the following types of meetings do you help plan?

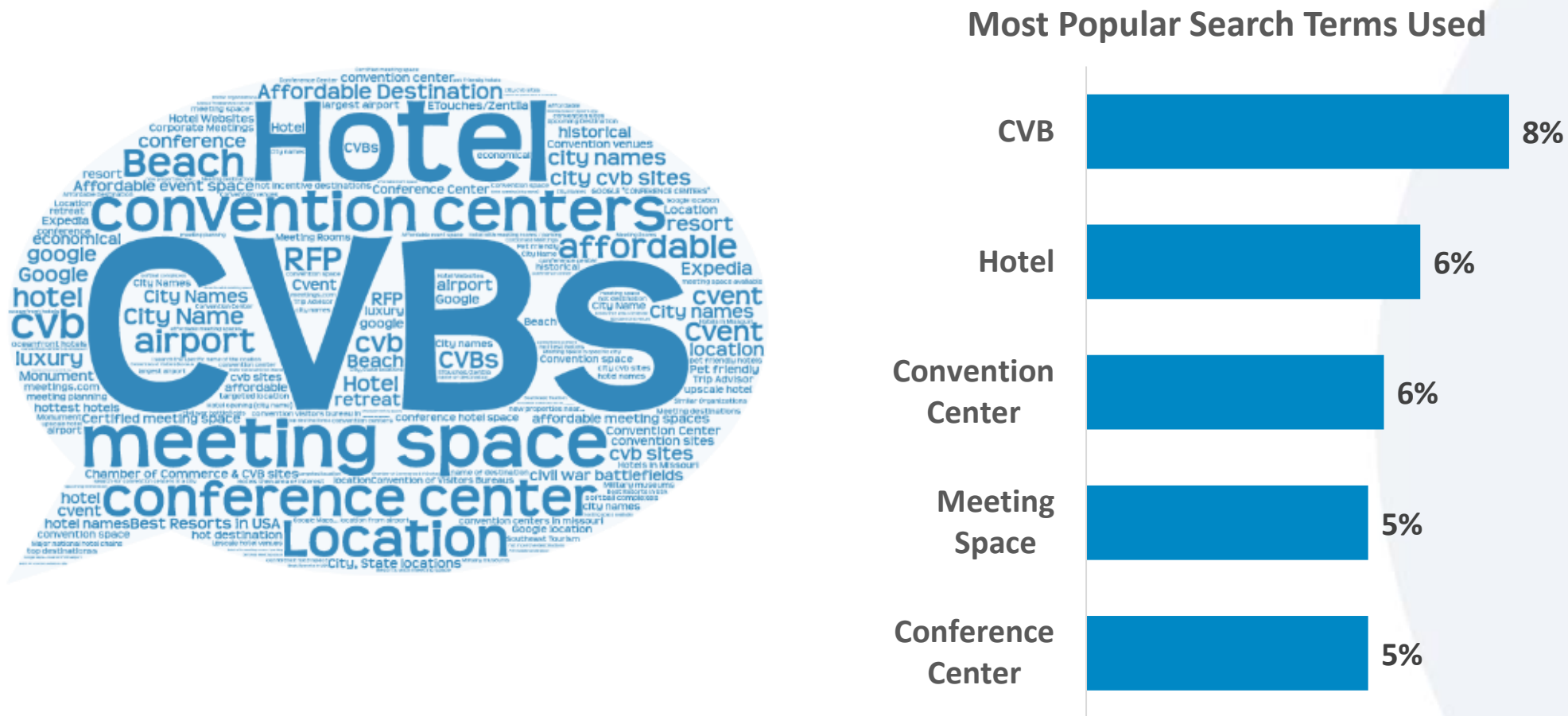
Inspiration for New Destinations for Meetings

Meeting planners continue to rely on previous experience, conference attendees and colleagues in the industry for inspiration on new destinations for meetings.

Interestingly, social media and direct mail both saw increases in inspiration scores since last measured in 2013.

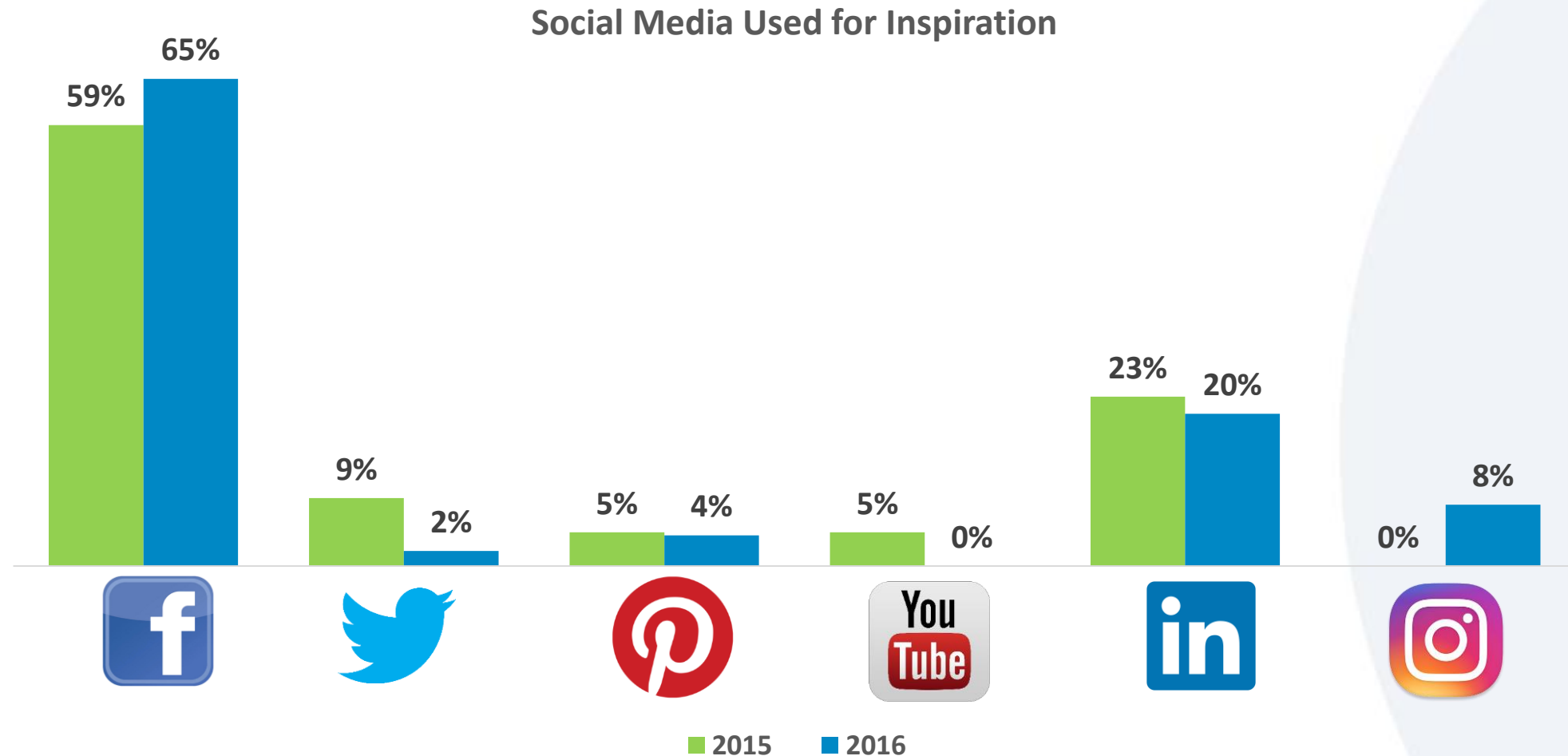


Those who used online searches have an abundance of search terms; however, CVB/Convention & Visitors Bureaus were the most popular terms.



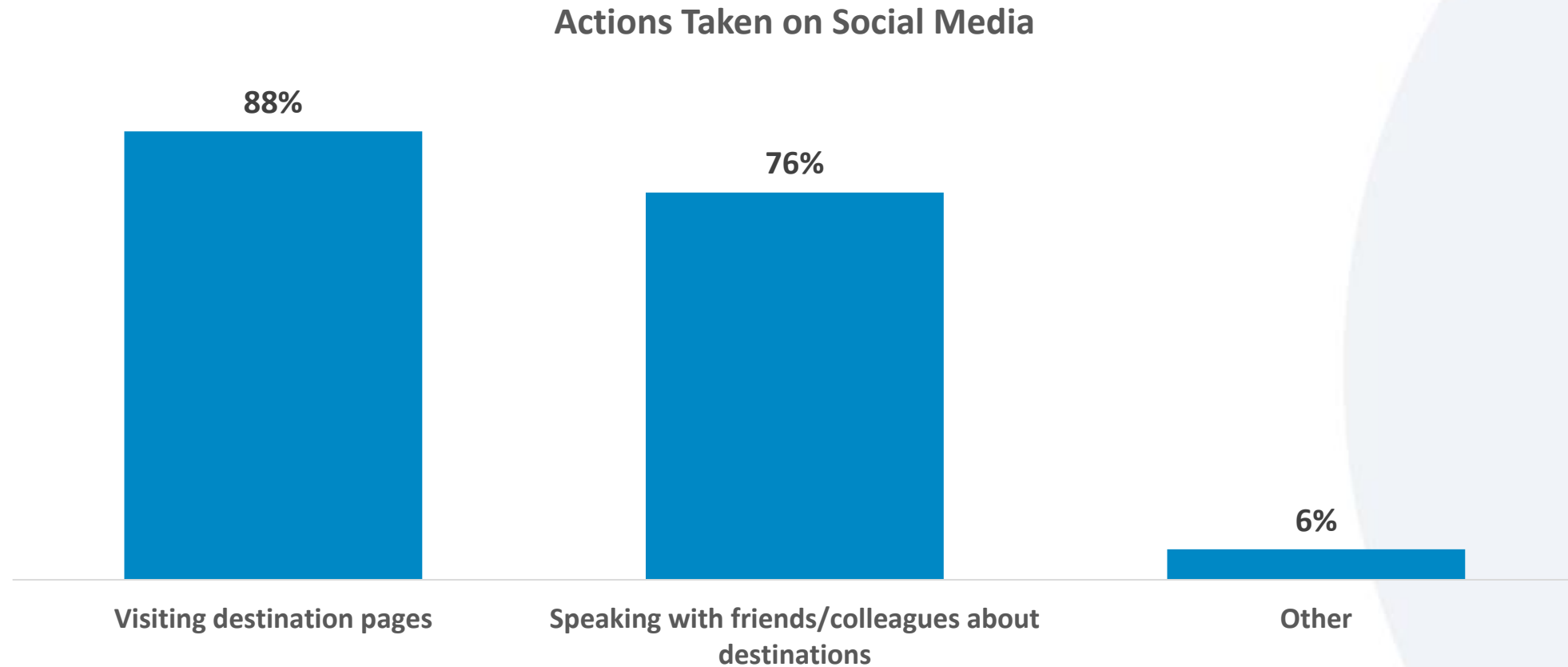
Q7: Previously you indicated that you use online searches for inspiration on new destinations. What online search terms are you most likely to use to help you find new places you may be looking for?

Instagram was completely unused three years ago and has replaced Twitter as a medium of choice, while Facebook still tops the list.



Q8: Previously you indicated 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?

Meeting planners are not only speaking with their friends/colleagues about destinations on social media but are also visiting destination pages in high numbers.

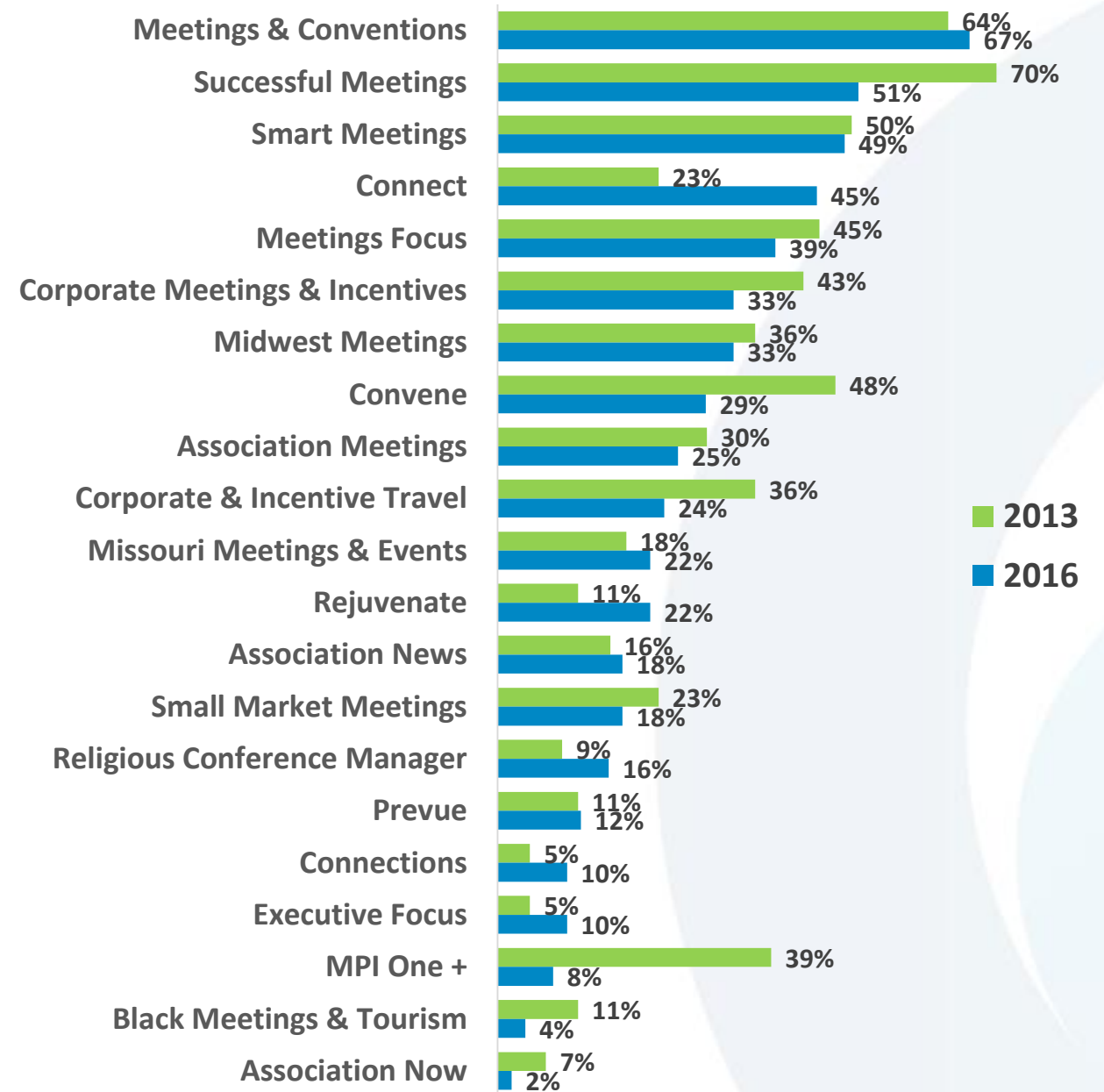


Q9: Which of the following actions are you taking on social media when looking for inspiration?

Trade Publications Used

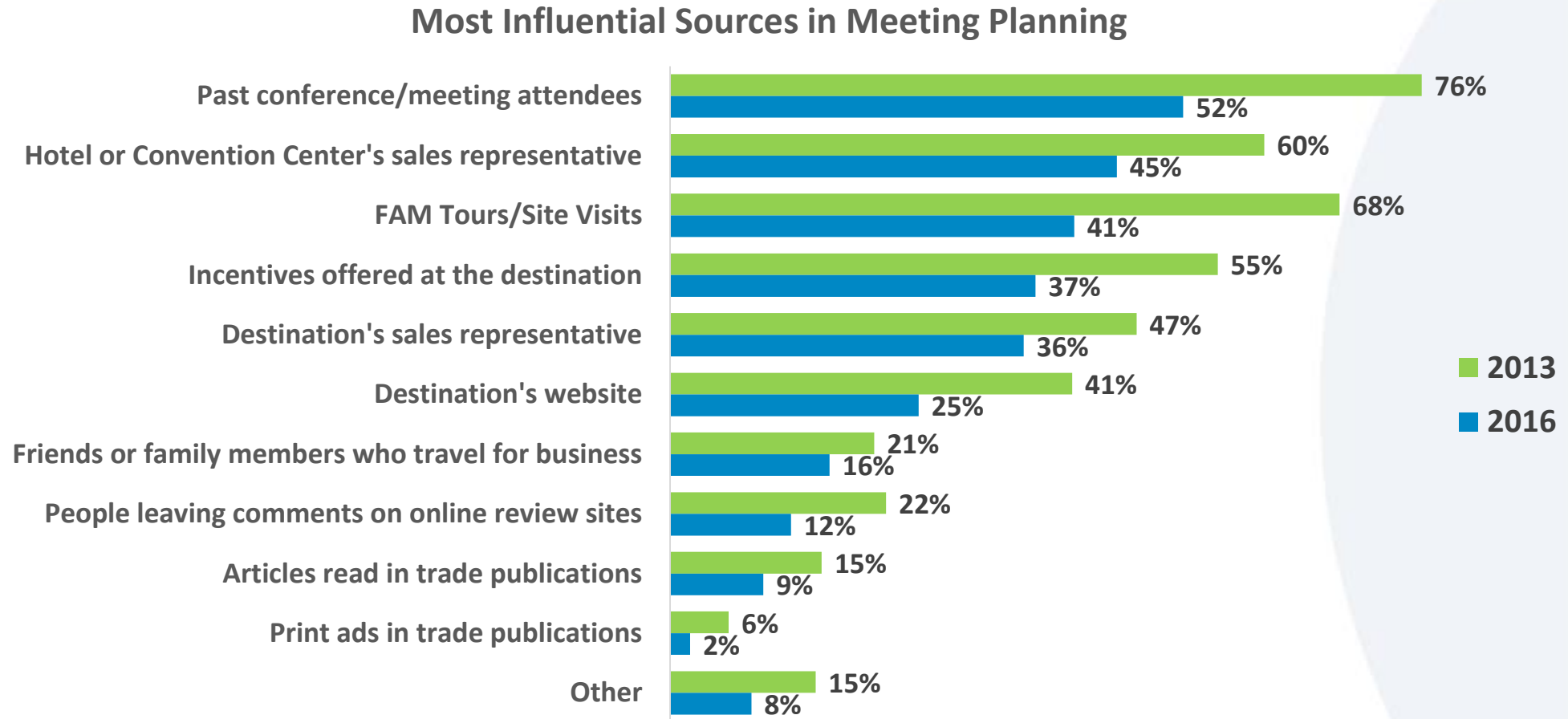
Trade publications such as Meetings & Conventions, Successful Meetings and Smart Meetings are the most used among meeting planner prospects for Springfield and Branson.

However, Successful Meetings saw a significant decline in readership since 2013, as well as Convene and MPI One+. Connect saw a significant increase in readership over this same timeframe.



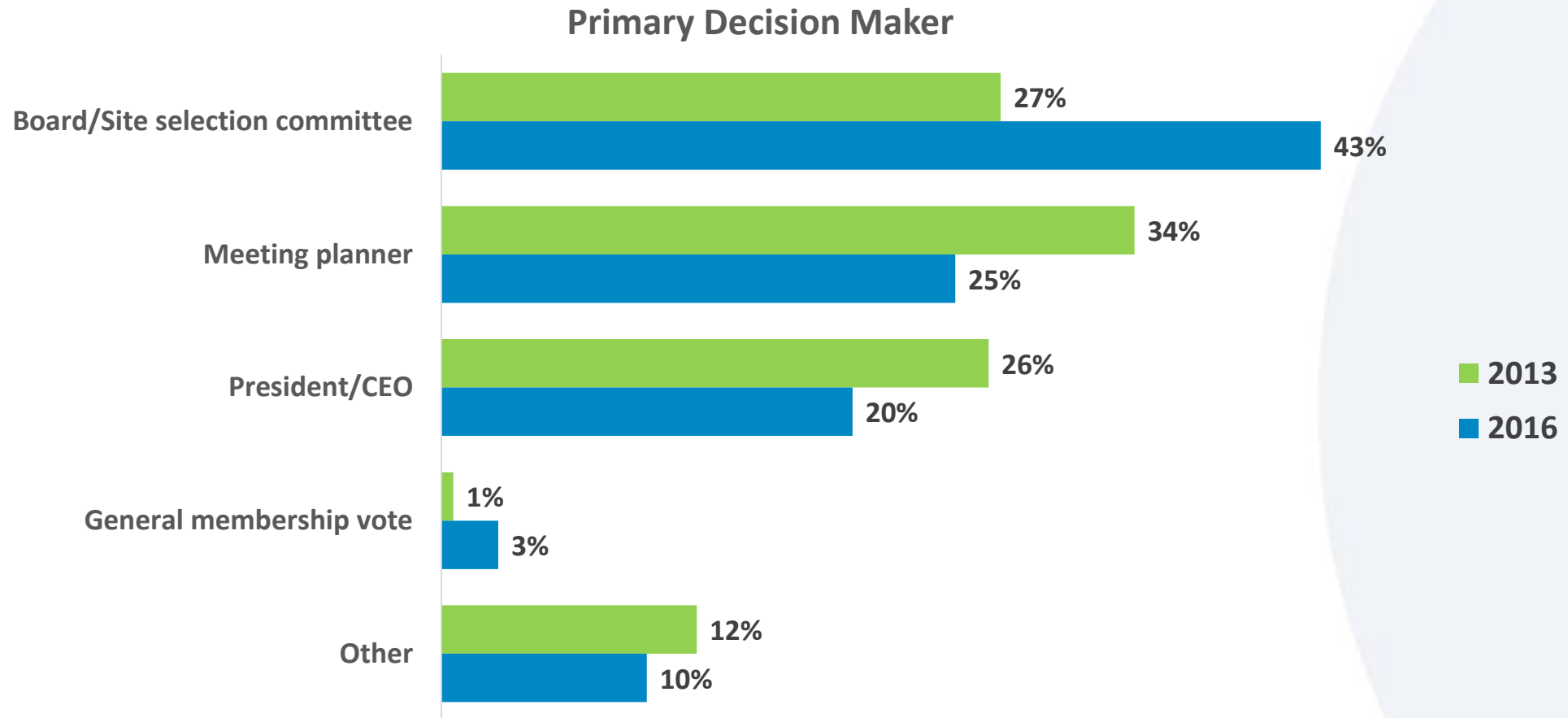
Q10: Previously you indicated that you review online or hard copy trade publications for inspiration on new destinations. Which specific trade publications are you most likely to review/read when researching new meeting destinations?

Many of the sources that used to be influential in meeting planning have significantly declined this year. Other comments reveal that preferences of staff and recommendations are still most influential.



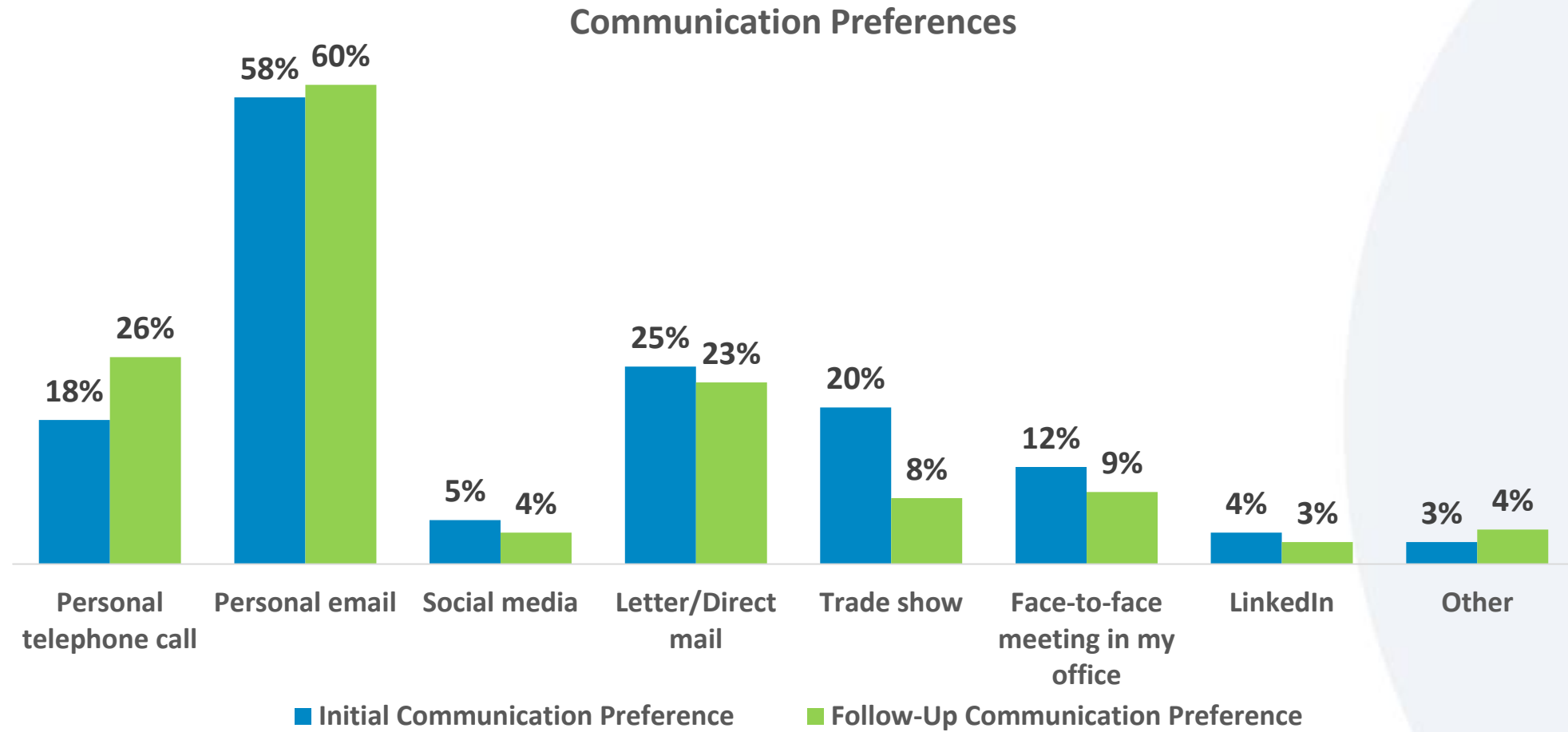
Q11: Which of the following people or sources are generally most influential in your decision to plan a meeting in a new destination?

Since 2013, the meeting planner has become less of a decision maker while board/site selection committees have taken a larger role in the decision making process.



Q12: Who is the primary decision maker for selecting meeting locations?

Meeting planners have similar preferences for both initial and follow up communications. Although, more are open to a personal telephone call for a follow up than the initial contact.

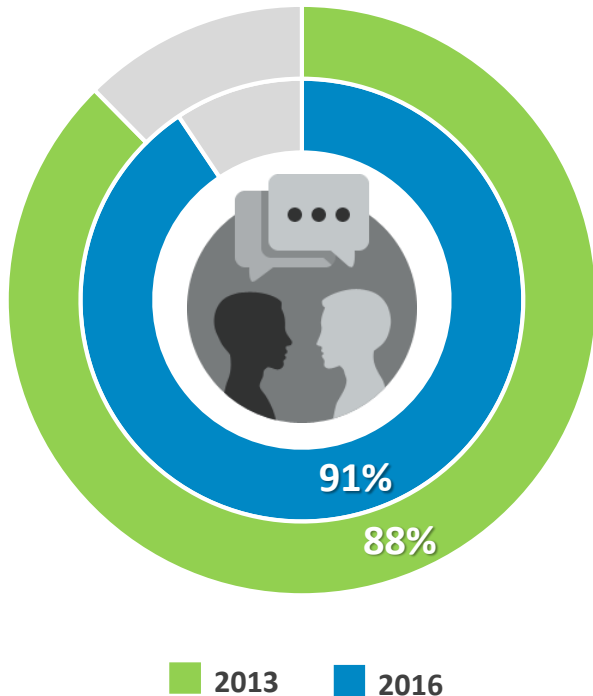


Q13: How do you prefer to receive initial communications from destinations you aren't already familiar with?

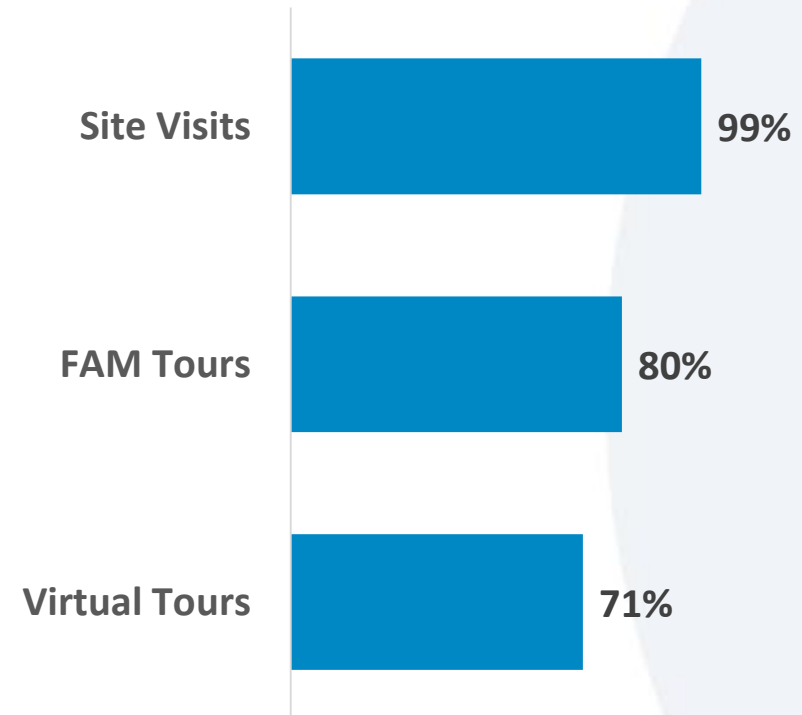
Q14: How, if at all, do you prefer to receive follow-up communications from these destinations?

In-person meetings continue to be extremely influential for meeting planners; however, site visits are influential to nearly all meeting planners on the prospect lists.

In-Person Meetings are
Somewhat/Very/Extremely Influential



% Somewhat/Very/Extremely
Important

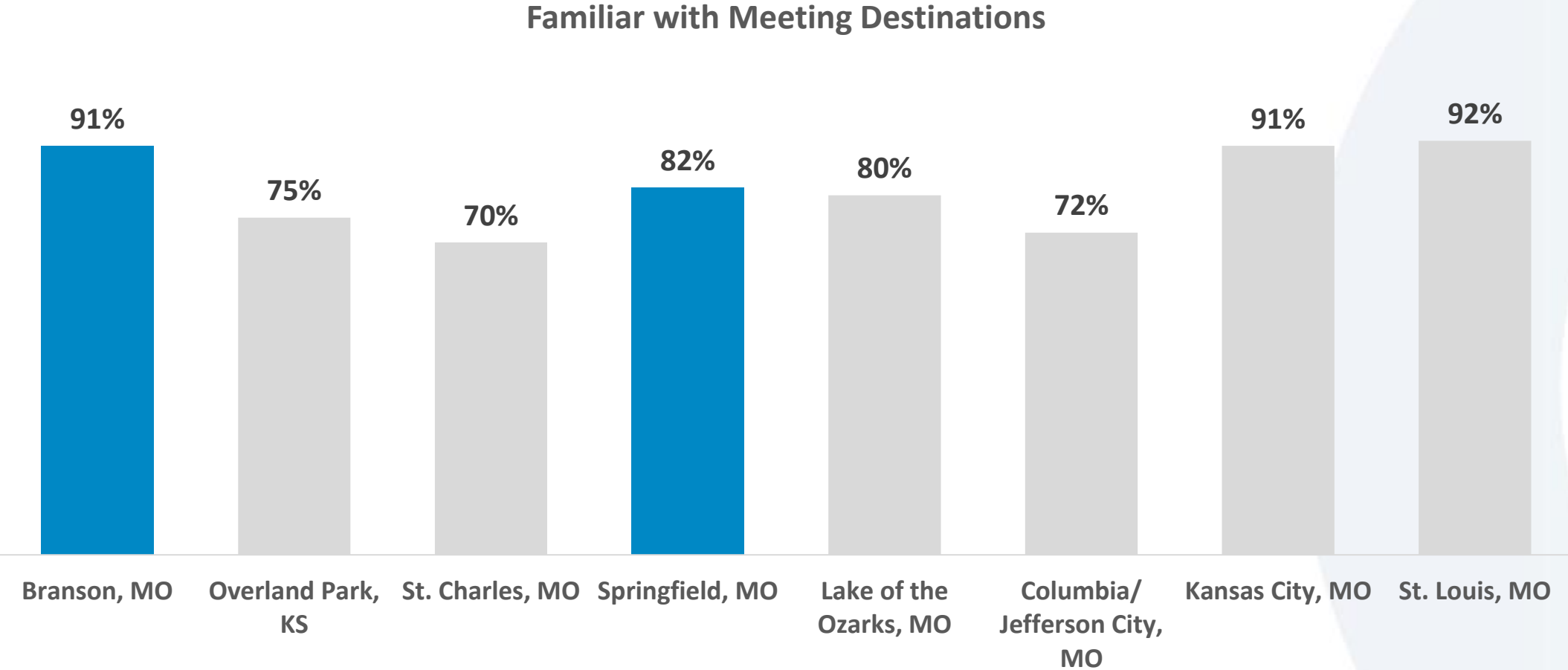


Competitive Destinations

- + *Familiarity*
- + *Market Potential*
- + *Bookings*
- + *Openness to Booking*
- + *Why Not Branson?*
- + *Why Not Springfield?*
- + *Differentiators*

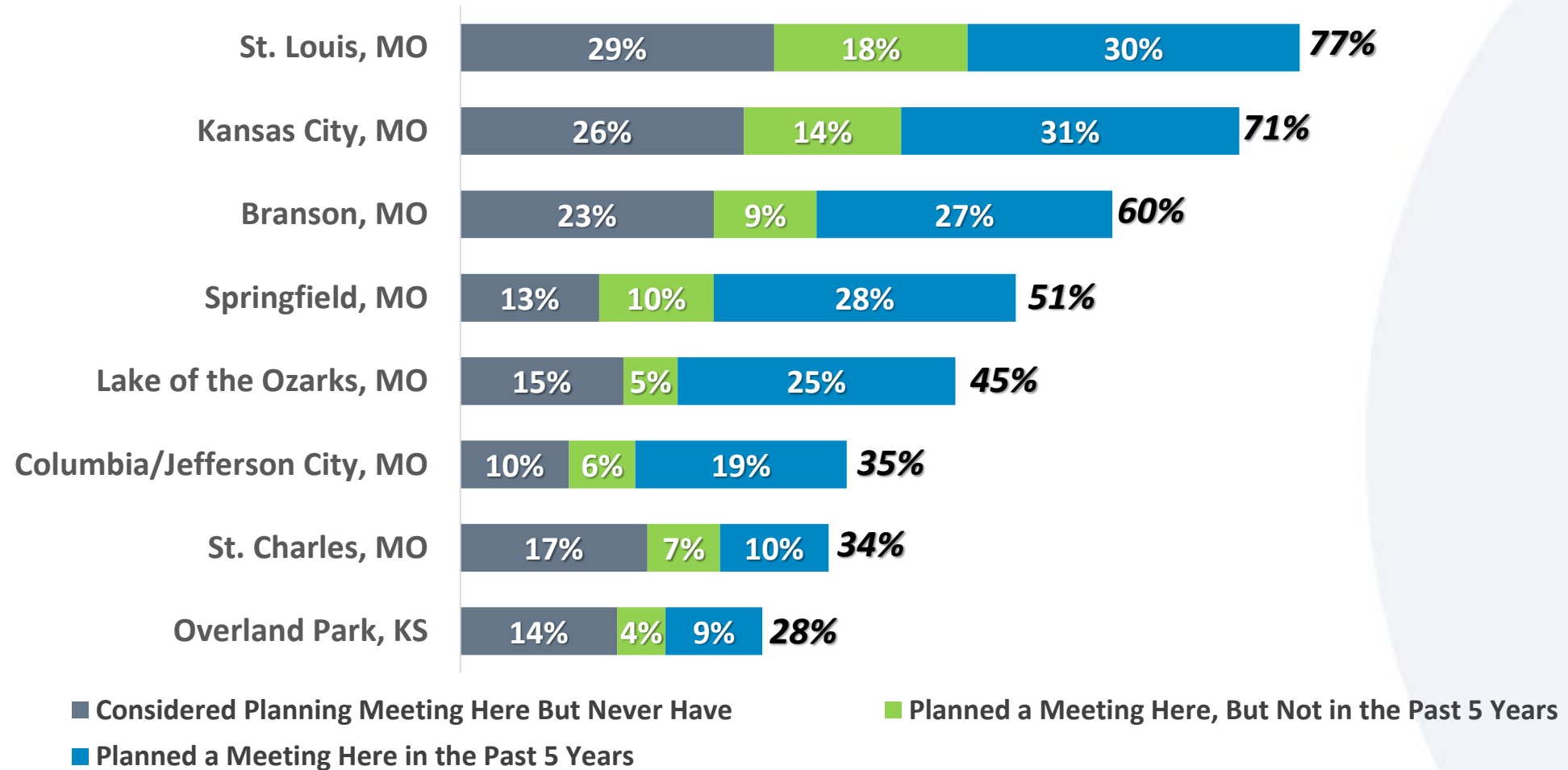
02

Meeting planners are quite familiar with Springfield and Branson as a meeting destination.



Q17: Please indicate your awareness and prior booking of the following destinations:

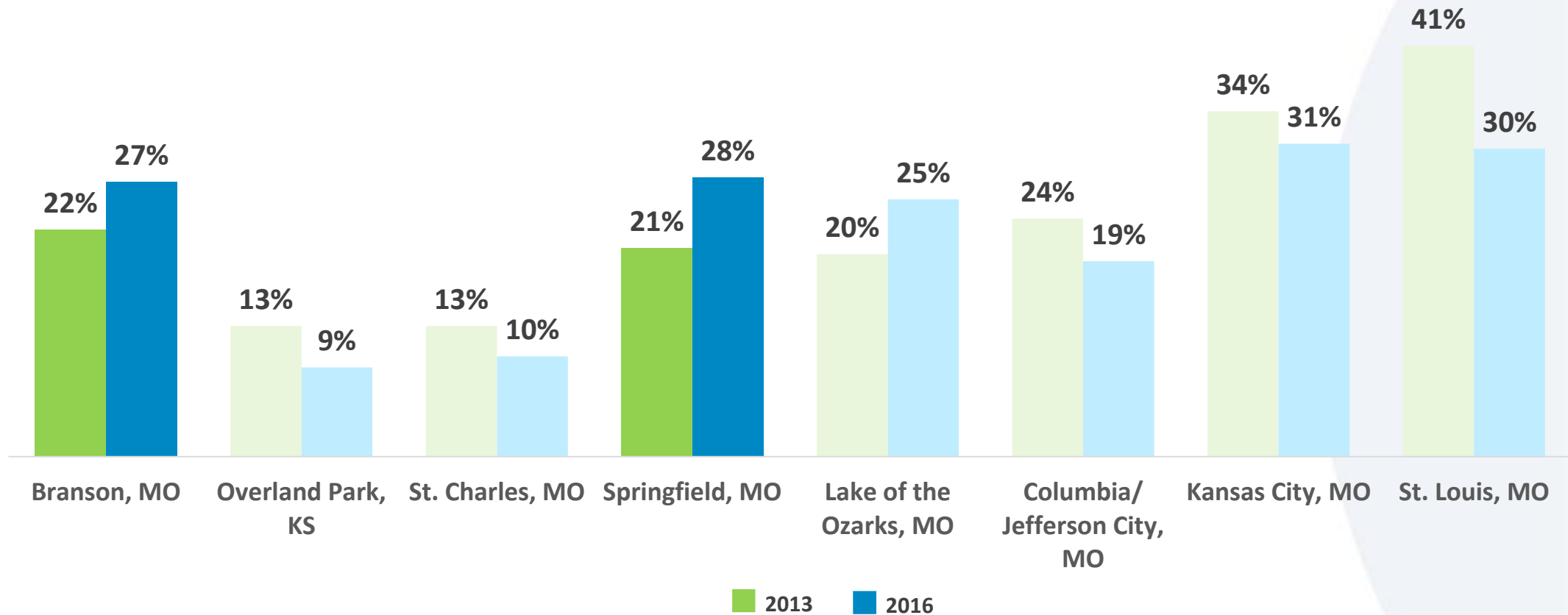
Springfield and Branson both have great market potential for meeting planners, with more than half having at least considered or booked in the destinations before.



Q17: Please indicate your awareness and prior booking of the following destinations:

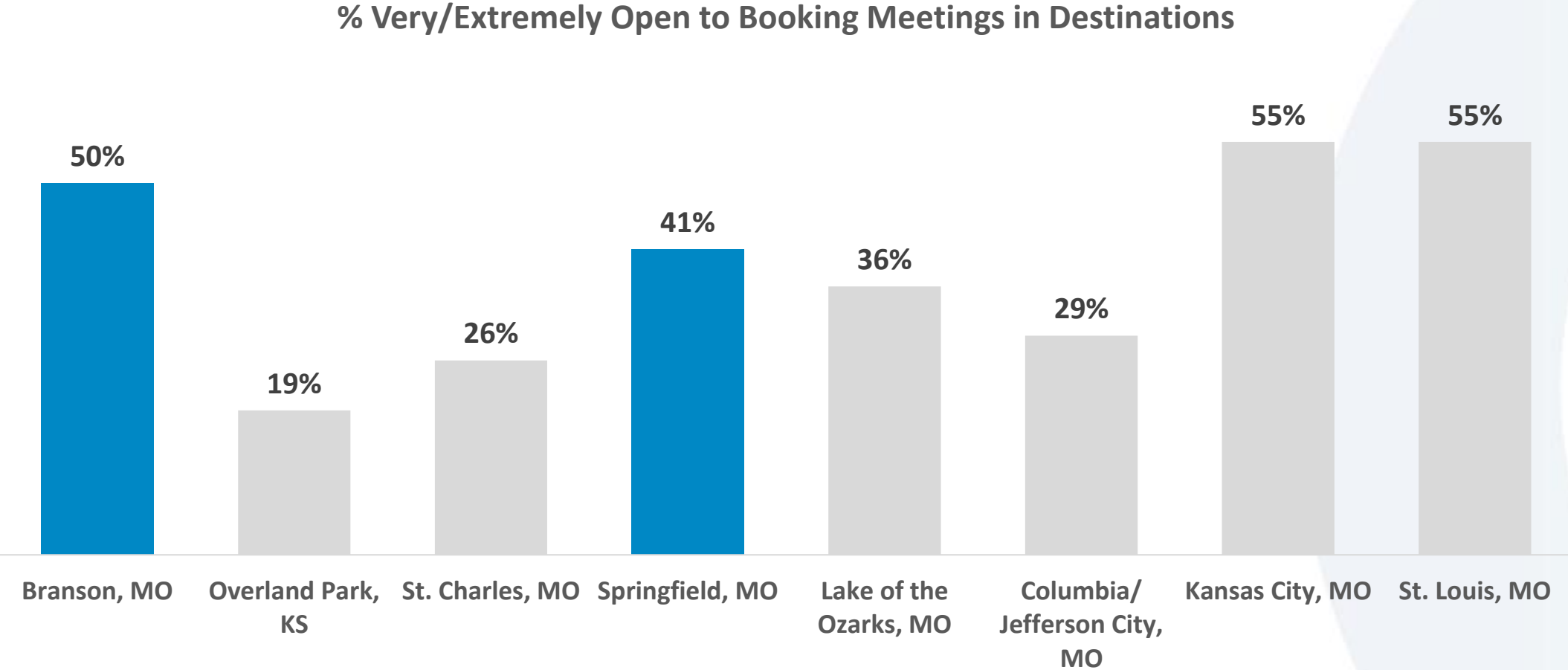
Potential meeting planners who've booked in Springfield or Branson have increased since previously measured while booking in Kansas City and St. Louis both declined.

Booked in the Past 5 Years



Q17: Please indicate your awareness and prior booking of the following destinations:

Both Springfield and Branson are in the top destinations that meeting planners are open to booking in the future.



Q18: How open are you to booking meetings at the following destinations?

Meeting planners who are not interested in booking in Branson indicate that the distance and a lack of information are keeping them at bay.

NAVIGATION/DISTANCE – 21%

“Generally the distance is an issue. For a conference or convention I would be more likely to look statewide.”

DON'T HAVE ENOUGH INFO – 19%

“Not familiar enough with the location. Not sure if it would fit with any of my programs.”

AIRLIFT – 14%

“Not sure it would be big enough or have easy airlift into it.”

WON'T REPEAT DESTINATIONS – 5%

“Because we had our convention in Branson this year and one other one in the past. A repeat to the same location within five years and the people won't attend.”

Those not willing to book in Springfield cite a lack of information and lack of facilities that meet their needs.

DON'T HAVE ENOUGH INFO – 26%

"I don't know much about it, so I'd have to do more research on Springfield."

FACILITIES/TOO SMALL – 15%

"I don't know that they have enough meeting space for us."






DISTANCE/NAVIGATION – 12%

"We used to hold our conference in Springfield. We found that it was a difficult journey for members in the northern part of the state."

AIRLIFT – 5%

"Airlift. Third / fourth tier city."

Both Springfield and Branson have their differentiators. Springfield is the best value for meeting planners while Branson is known for variety, nightlife and entertainment.

	Branson	Overland Park	St. Charles	Springfield	Lake of the Ozarks	Columbia/ Jeff City	Kansas City	St. Louis
Value	12%	19%	10%	39% 	11%	22%	14%	15%
Nightlife & entertainment	20% 	2%	10%	0%	3%	0%	14%	9%
Variety of things to do	37%	5%	12%	7%	20%	4%	18%	27%
Meeting facilities	8% 	23%	26%	18% 	15%	29%	18%	31%
Lodging facilities	5%	19%	8%	6%	24%	14%	10%	6%
Warm & friendly residents	14% 	14%	12%	13%	12%	18%	4%	1%
Incentives to book in their destination	3%	7%	10%	11%	11%	14%	7%	8%
Quality Restaurants	2%	12%	12%	7%	7%	0%	15%	3%

Q21: Which of these destinations (if any) do you perceive as providing the best...

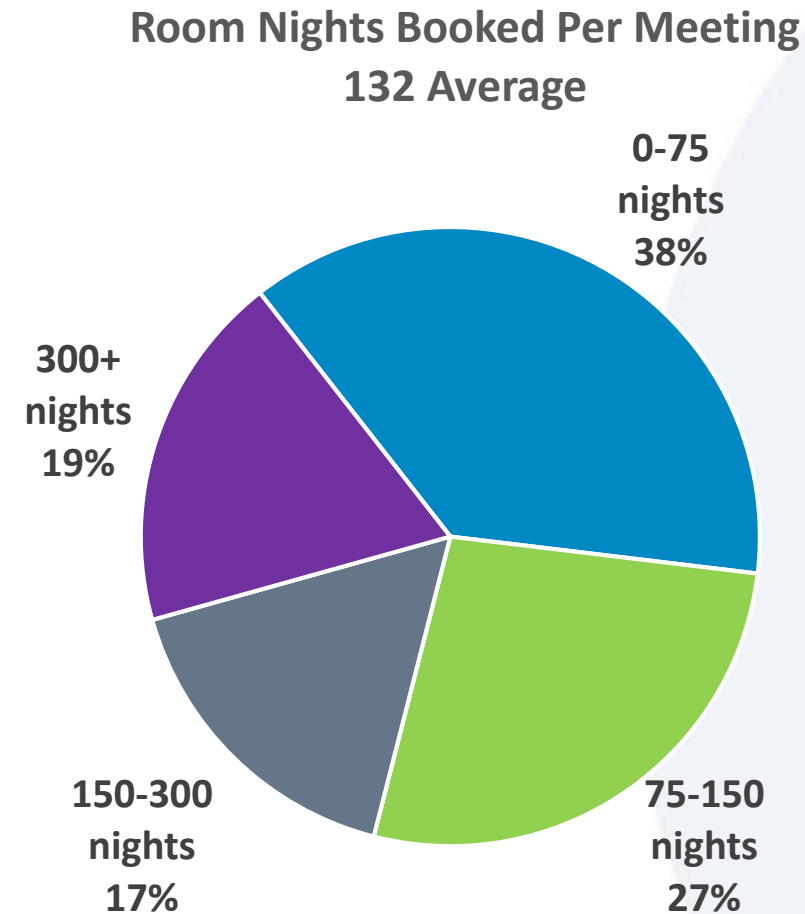
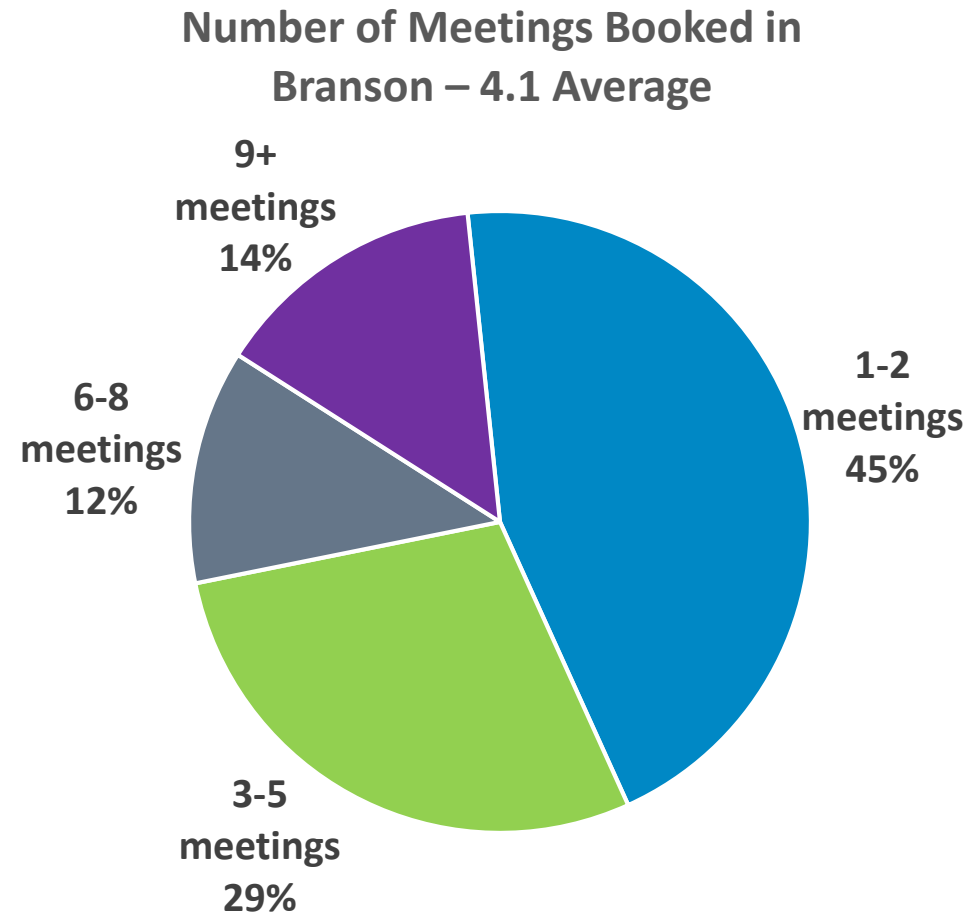
*Arrows signify a significant increase or decrease from 2013 scores.

Branson Meeting Planners

- + *Number of Meetings Booked*
- + *Average Room Nights Per Meeting*
- + *Satisfaction with Destination & Facility Attributes*
- + *Brand Map*
- + *Website Usability*
- + *Net Promoter Score*

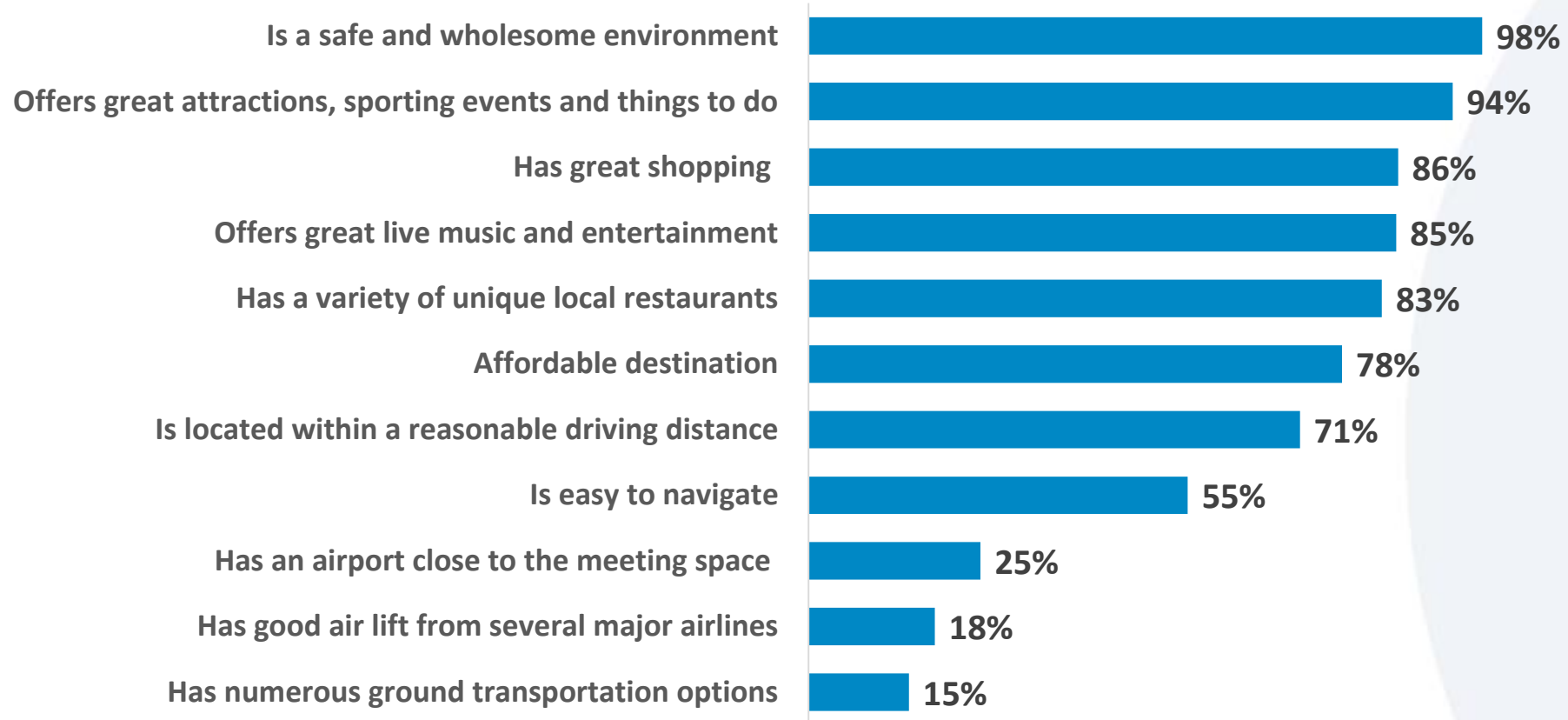
03

Meeting planners in Branson have booked an average of four meetings in the past five years, with approximately 132 room nights each.



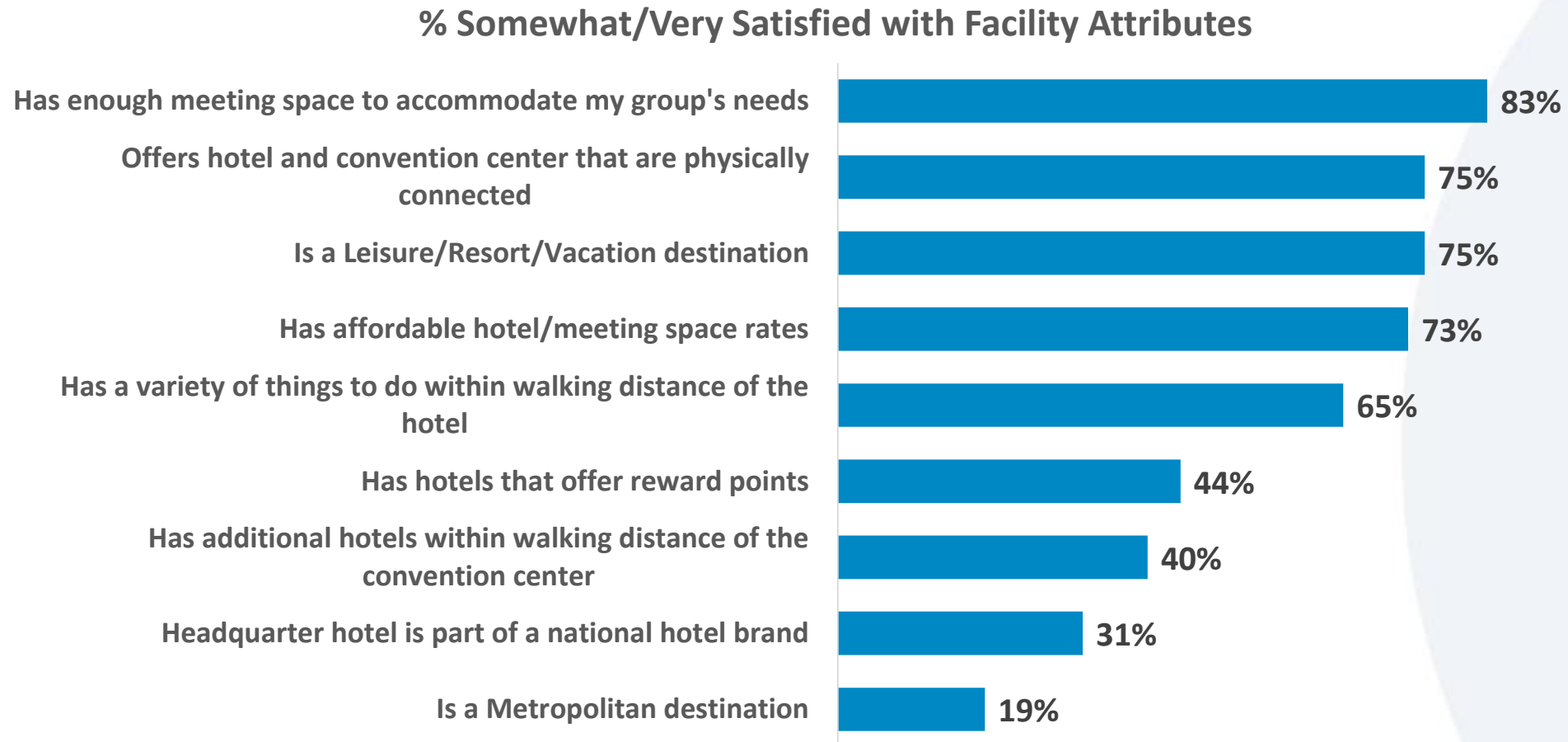
Meeting planners are most satisfied with Branson's safe, wholesome environment and great attractions and things to do.

% Somewhat/Very Satisfied with Destination Attributes



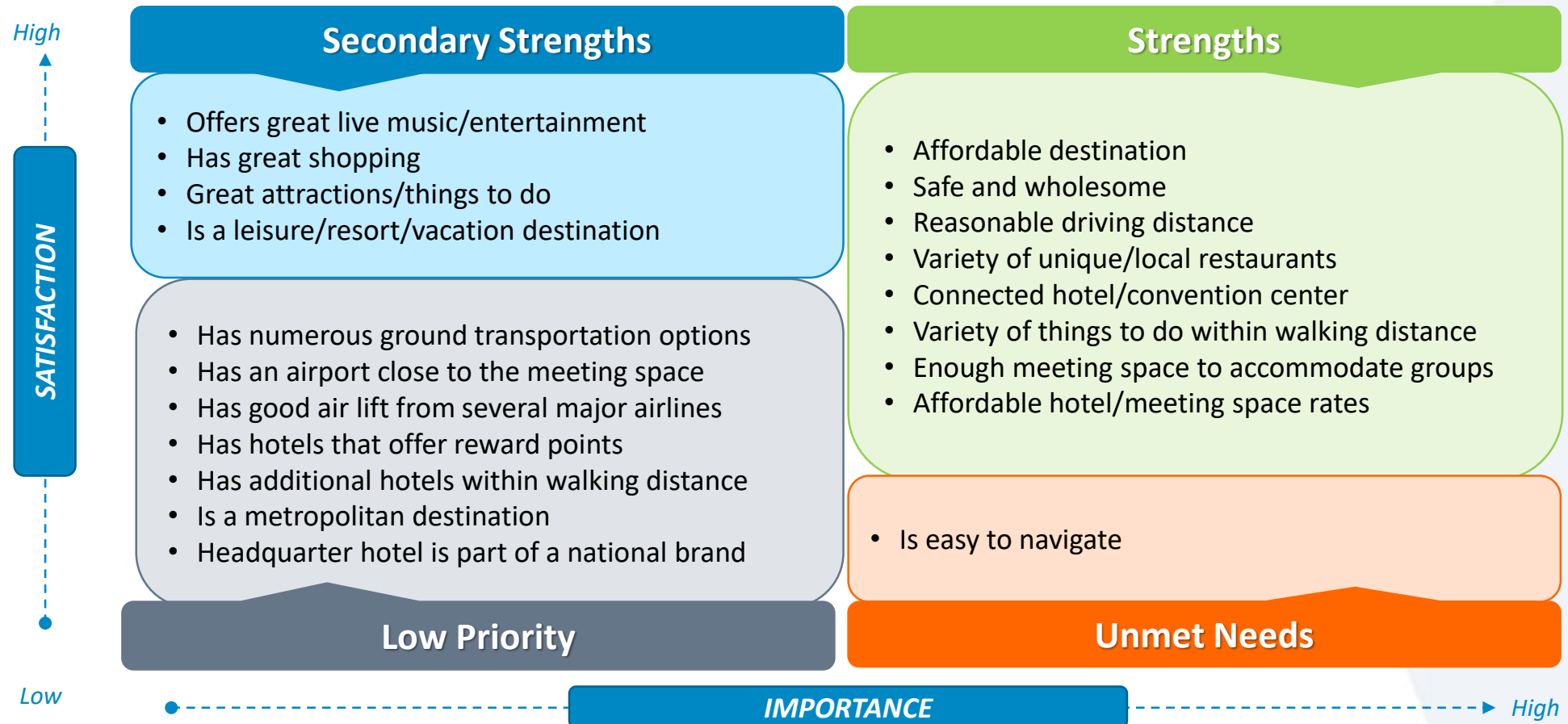
Q24: Please indicate how satisfied you are with Branson among each of the following destination attributes:

And, they are most satisfied with Branson facilities' meeting spaces and connected hotel/convention center.



Q25: Please indicate how satisfied you are with Branson among each of the following facility attributes:

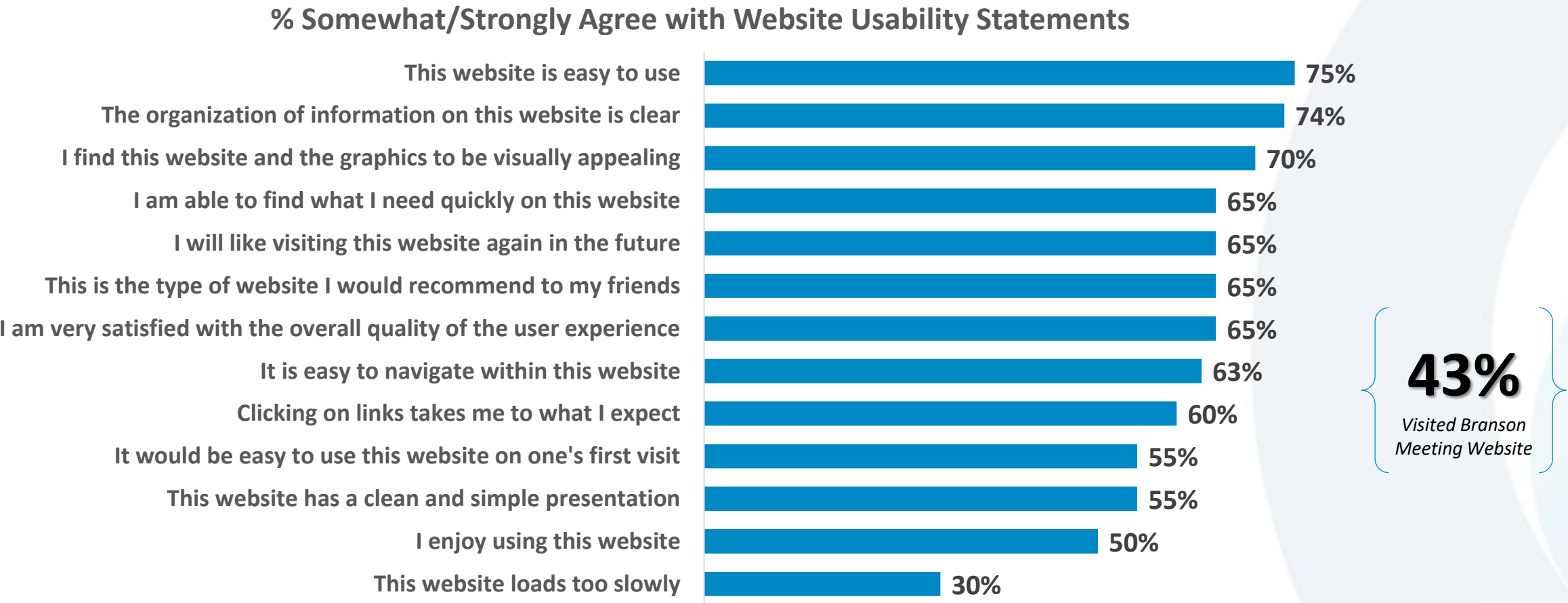
The only unmet need for potential meetings is ease of navigation in and around the destination—which was an issue for those who haven't booked in Branson as well.



Q24: Please indicate how satisfied you are with Branson among each of the following destination attributes:

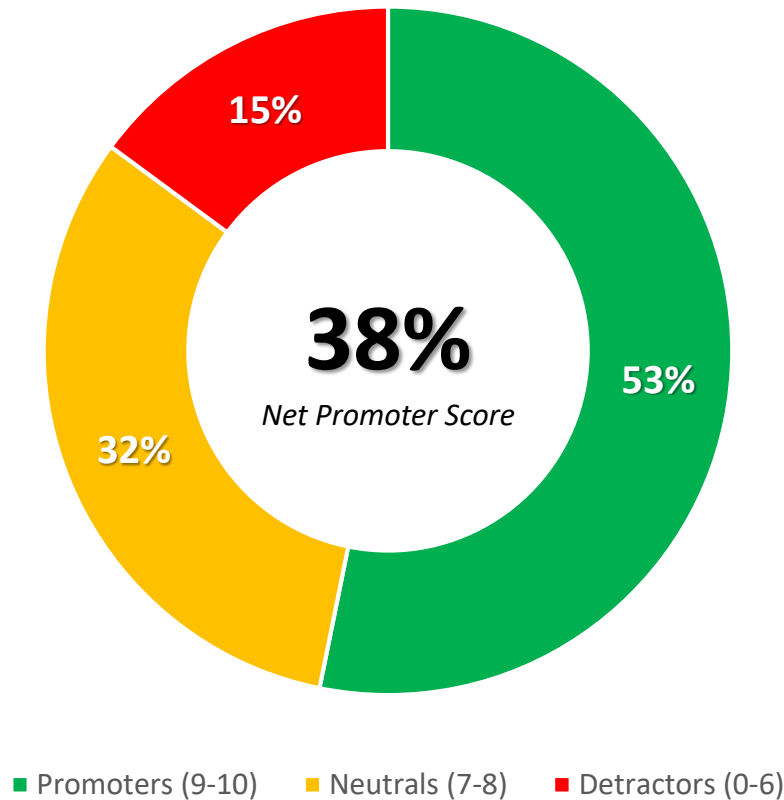
Q25: Please indicate how satisfied you are with Branson among each of the following facility attributes:

Meeting planners who visited the Branson website agree that it is easy to use and the organization on the website is clear.



Q26: Have you visited the Branson Meetings website to get more information? Q27: Using the scale provided, please indicate the level to which you agree or disagree with each of the following statements about the Explore Branson website:

Branson's NPS was 38%, fueled by more than half of meeting planners saying they would recommend Branson and only 15% saying they wouldn't.



"Has everything needed for a conference - entertainment, lodging, meeting facilities. Walking distance to all."

"Just the proximity to a larger airport which offers cheaper rates. It is hard to plug Branson for a regional conference in a region that is so spread out among 14 states. Otherwise, Branson is great!"

"Branson, MO is for old people. There's nothing new or modern about it. The landing tries to move that direction, but it's so small..."

Q28: Using the scale provided, please indicate how likely you would be to recommend Branson as a meeting destination to your colleagues.

Q29: Why did you give the rating above? Please be as specific as possible.

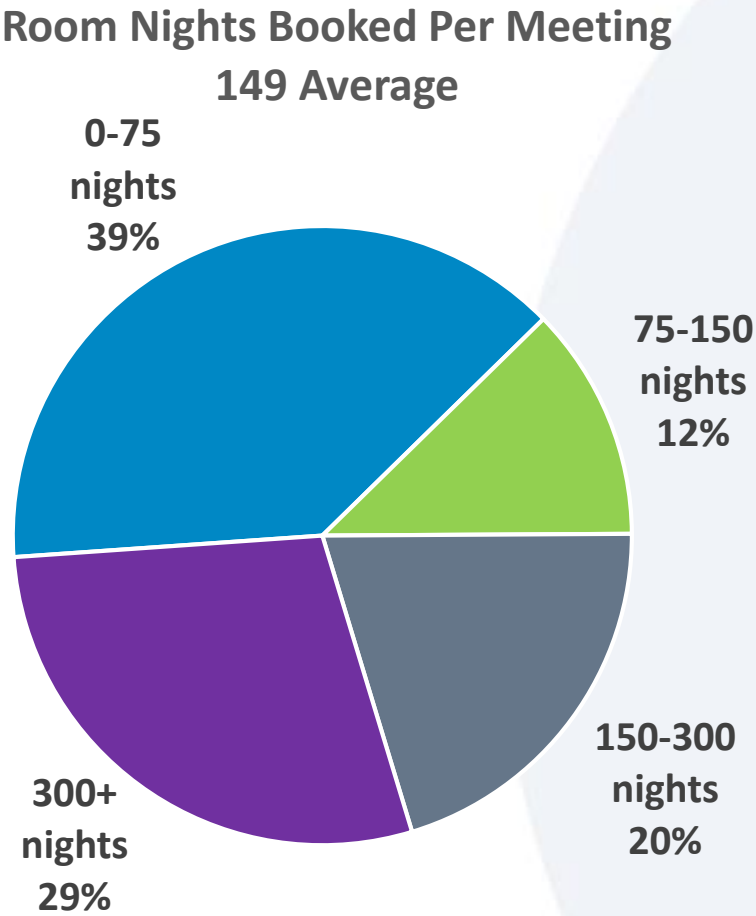
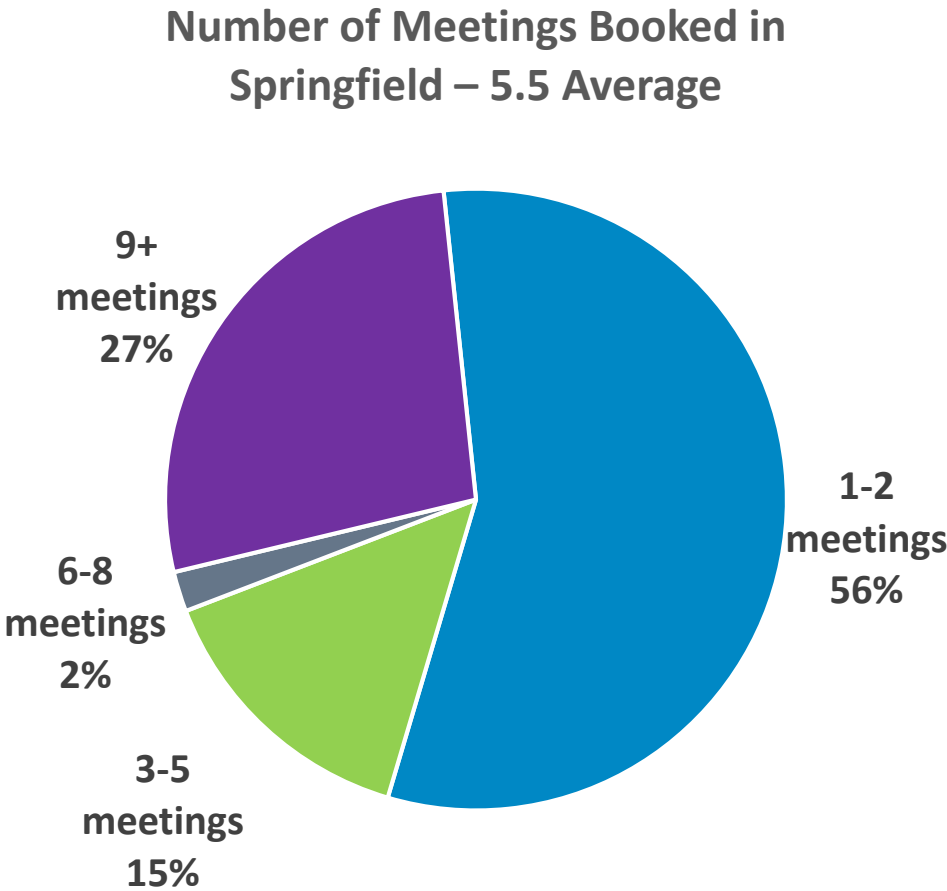
RESPONDENT BASE: BOOKED IN BRANSON IN PAST 5 YEARS | N=49

Springfield Meeting Planners

- + *Number of Meetings Booked*
- + *Average Room Nights Per Meeting*
- + *Satisfaction with Destination & Facility Attributes*
- + *Brand Map*
- + *Website Usability*
- + *Net Promoter Score*

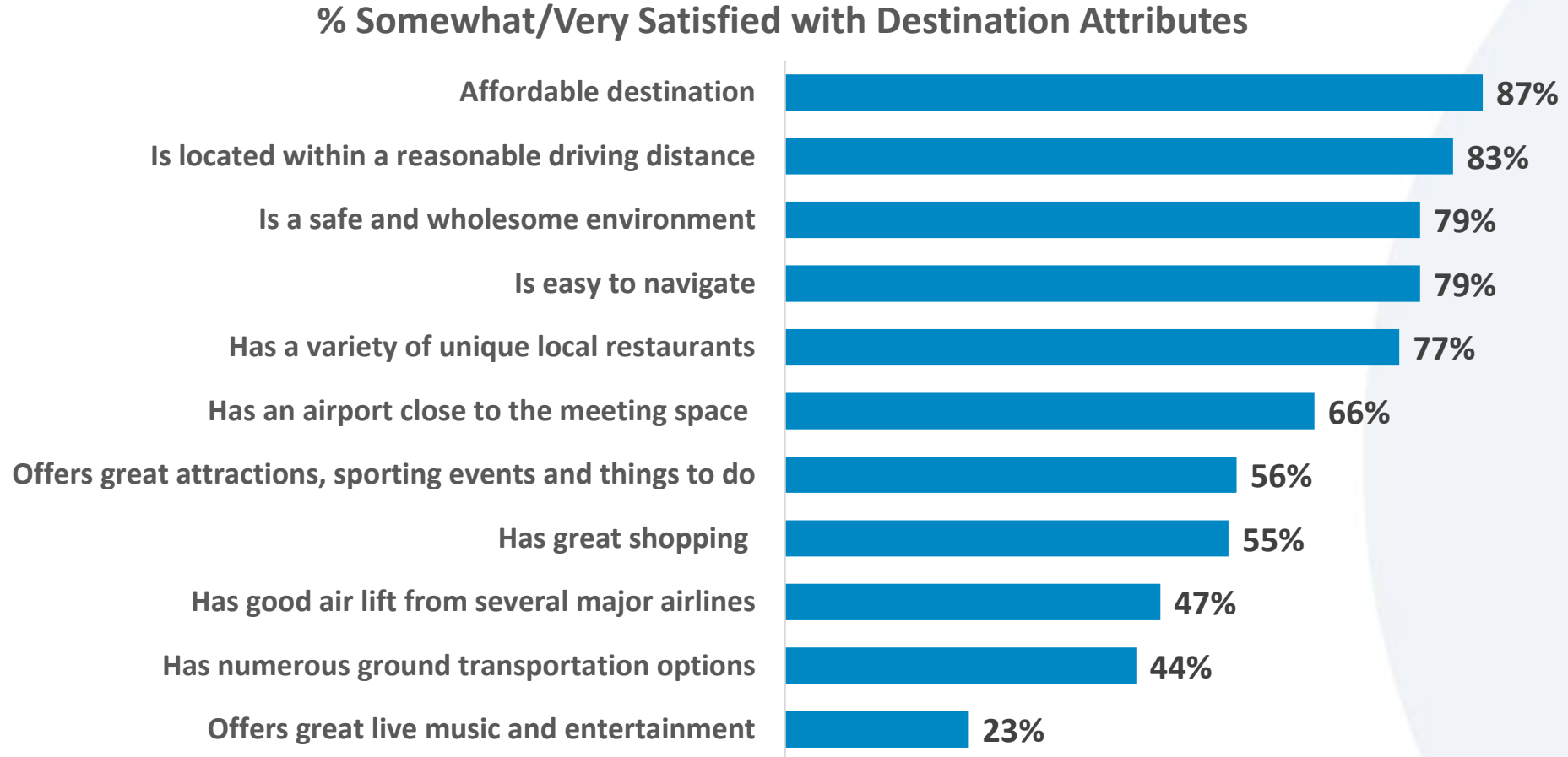
04

Meeting planners in Springfield have booked an average of just over five meetings in the past five years—averaging 149 room nights per meeting.



Q30: How many meetings have you and/or your company booked in Springfield, MO?
Q31: On average, how many total room nights were booked for each of these meetings?

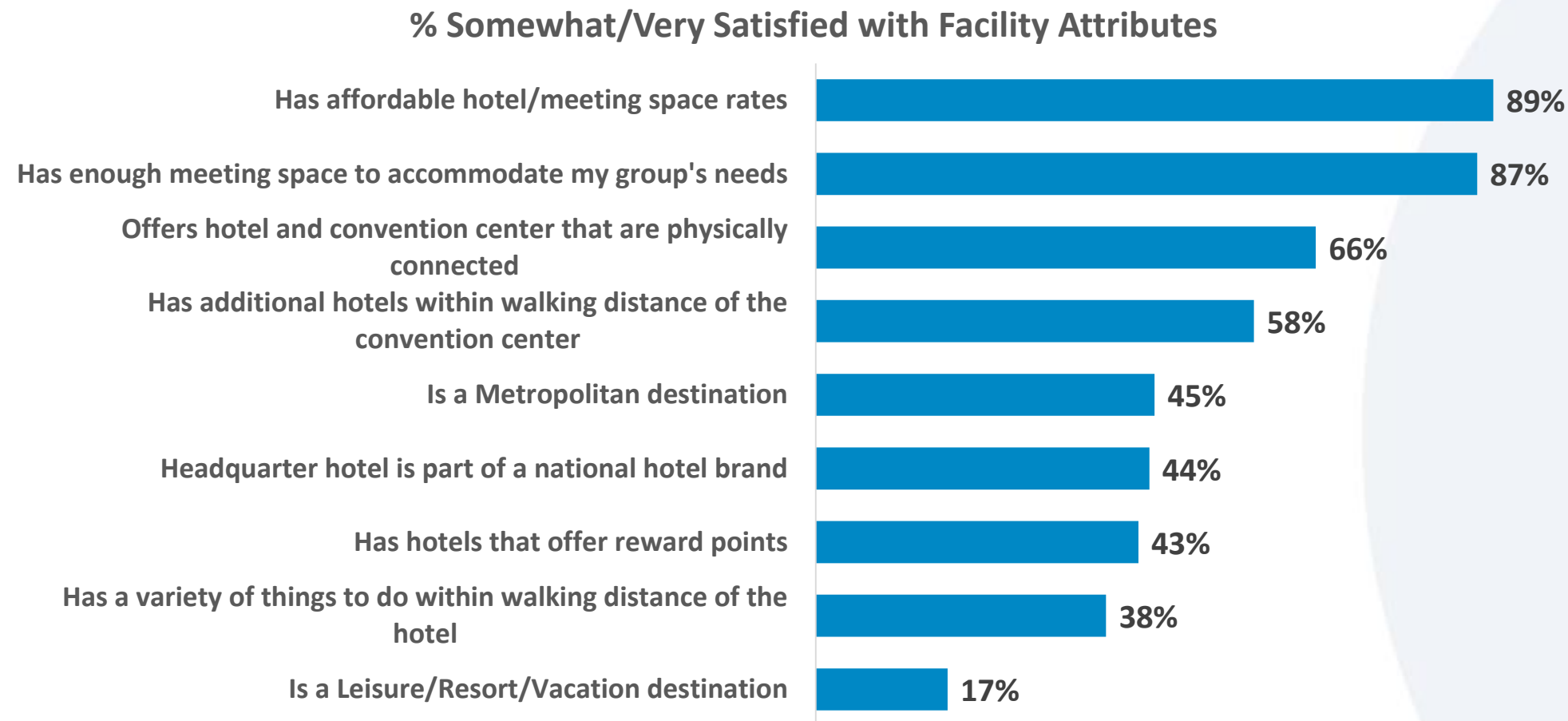
Meeting planners are most satisfied with Springfield's affordability and easy location within driving distance of attendees.



Q32: Please indicate how satisfied you are with Springfield among each of the following destination attributes:

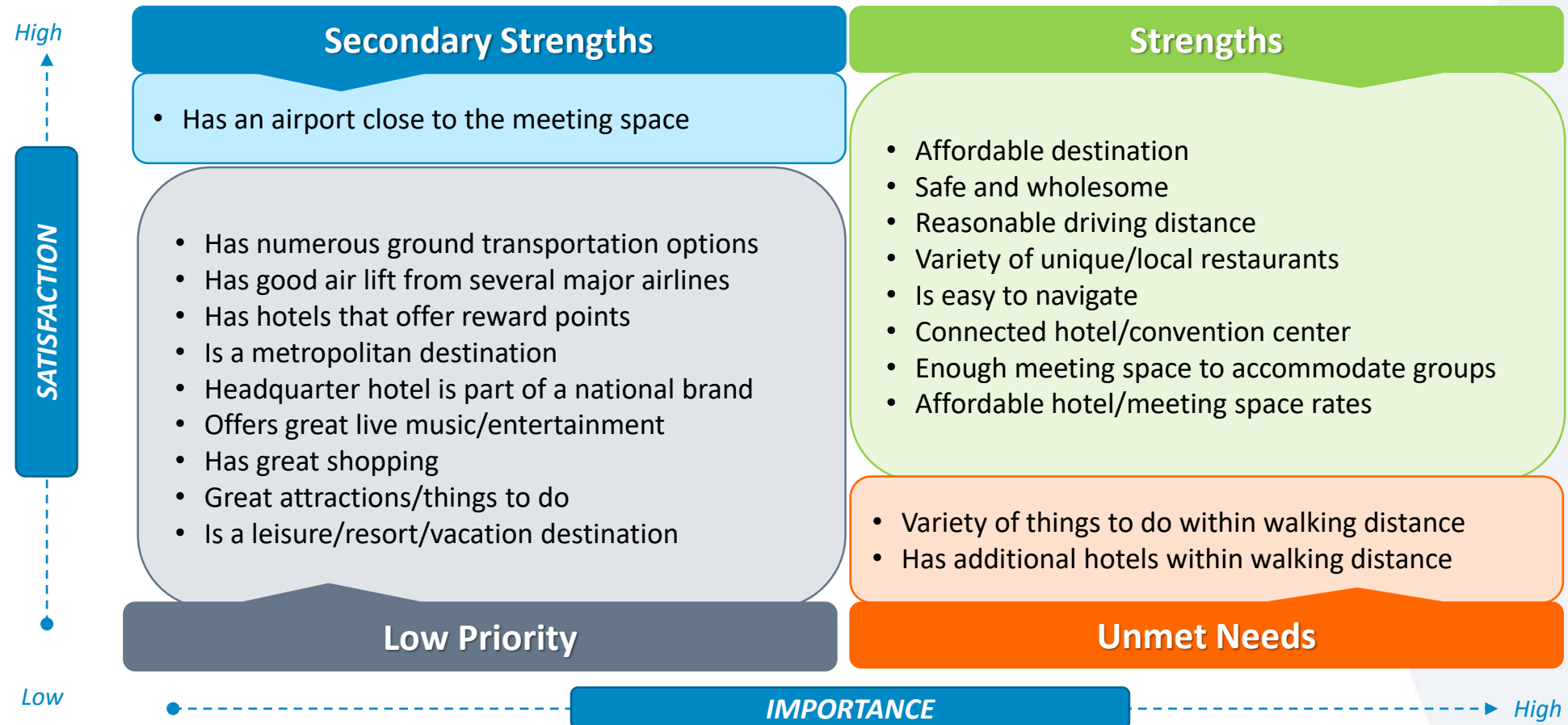
RESPONDENT BASE: BOOKED IN SPRINGFIELD IN PAST 5 YEARS | N=50

Planners are also most satisfied with the affordable hotel/meeting space rates and the amount of meeting space available.



Q33: Please indicate how satisfied you are with Springfield among each of the following facility attributes:

Springfield has many strengths for meeting planners, including affordability, and ease of navigation. However, some planners wish there was more variety of things to do and additional hotels within walking distance.

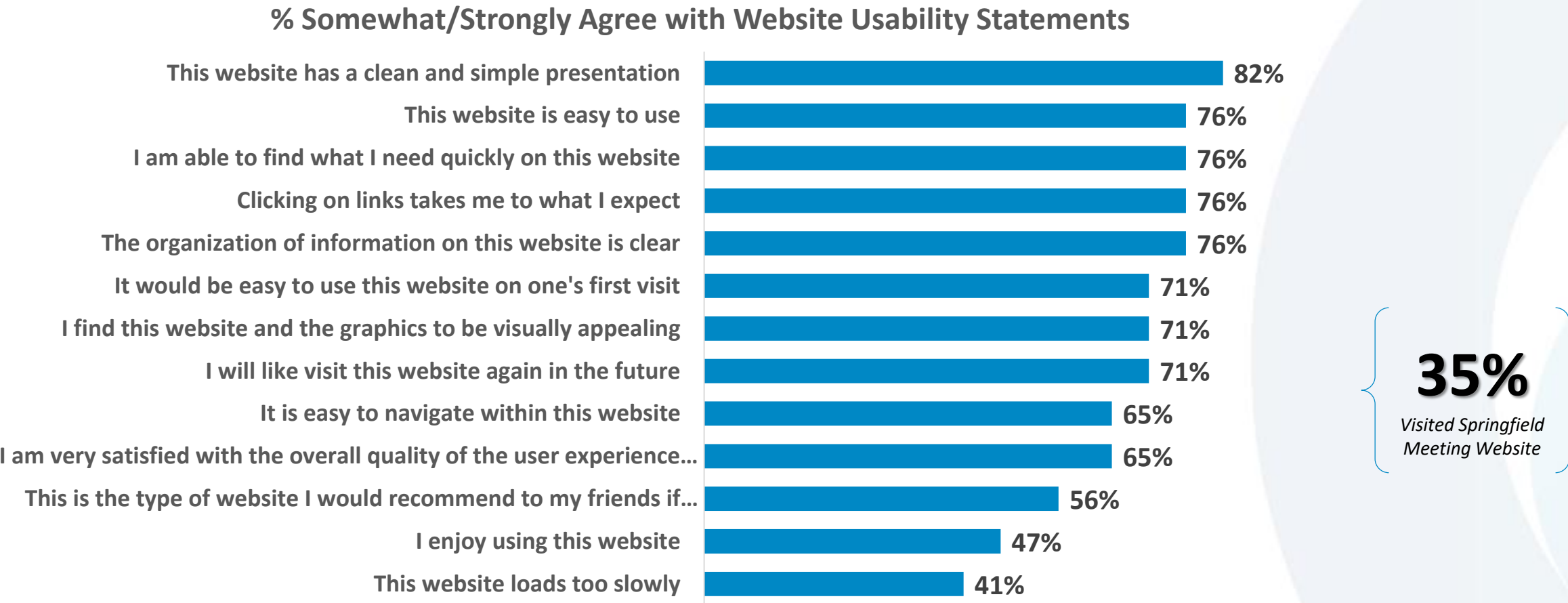


Q32: Please indicate how satisfied you are with Springfield among each of the following destination attributes:

Q33: Please indicate how satisfied you are with Springfield among each of the following facility attributes:

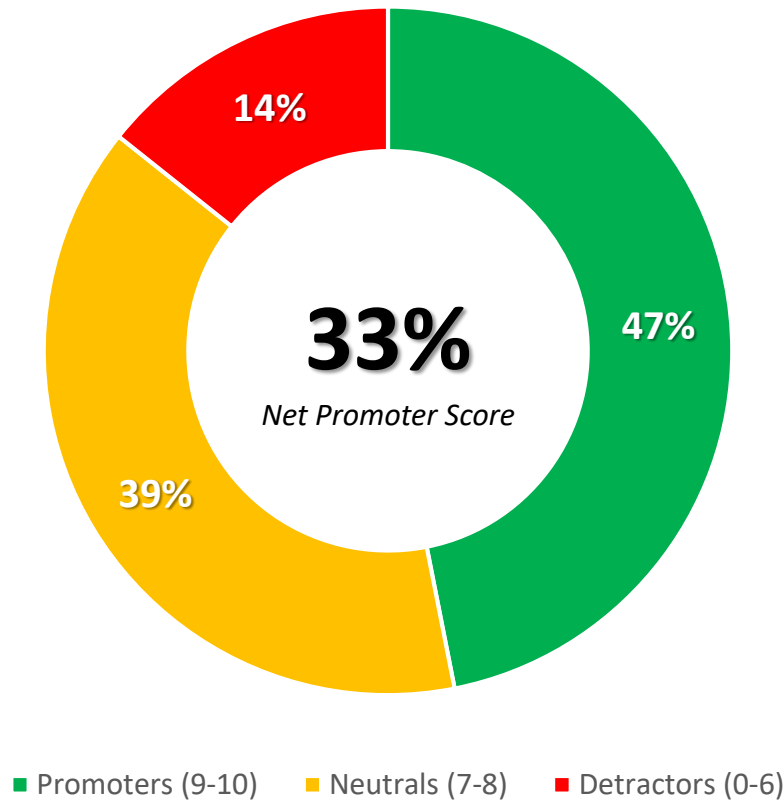
RESPONDENT BASE: BOOKED IN SPRINGFIELD IN PAST 5 YEARS | N=50

Springfield meeting planners agree most that the Springfield website is clean and simple, easy to use, easy to navigate and the organization is clear.



Q34: Have you visited the Springfield Meetings website to get more information?
Q35: Using the scale provided, please indicate the level to which you agree or disagree with each of the following statements about the Springfield website:

Springfield earned an NPS of 33% among meeting planners, with nearly half saying they would recommend the area and only 14% saying they wouldn't.



"Springfield is a big enough city to have good hotel and entertainment options, but not so big that it's hard to navigate."

"Overall, it's a good destination for small to medium meetings/events. The drawbacks include the fact that it's an expensive destination to fly in and out of, and there aren't that many flights available."

"Limited options for large groups. Very limited shopping and tourism options."

Q36: Using the scale provided, please indicate how likely you would be to recommend Springfield as a meeting destination to your colleagues.

Q37: Why did you give the rating above? Please be as specific as possible.

RESPONDENT BASE: BOOKED IN SPRINGFIELD IN PAST 5 YEARS | N=50

Meeting Planner Profiles

+ *Demographic Categorization*

05

Overall meeting planners are most likely female and have been in the business nearly 20 years.

	Overall Meeting Planners	Branson Meeting Planners	Springfield Meeting Planners
Association with Business			
President/CEO	8%	4%	6%
Executive Director	15%	27%	18%
Meeting Planner	46%	45%	38%
Third Party Planner	11%	6%	0%
Board Member/Volunteer	8%	6%	18%
Executive Assistant	6%	6%	8%
% Male	27%	33%	40%
% Female	73%	67%	60%
Distance from Branson	441 miles	204 miles	202 miles
Distance from Springfield	426 miles	182 miles	178 miles
Average Age	50	51	53
Years in Business	17	17	18

Thank You!



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H2R MARKET RESEARCH

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