

METROPOLL XIV

A MARKETING STUDY OF LEADING NORTH AMERICAN CONVENTION SITES

Crucial Insight from Meeting Planners Across North America



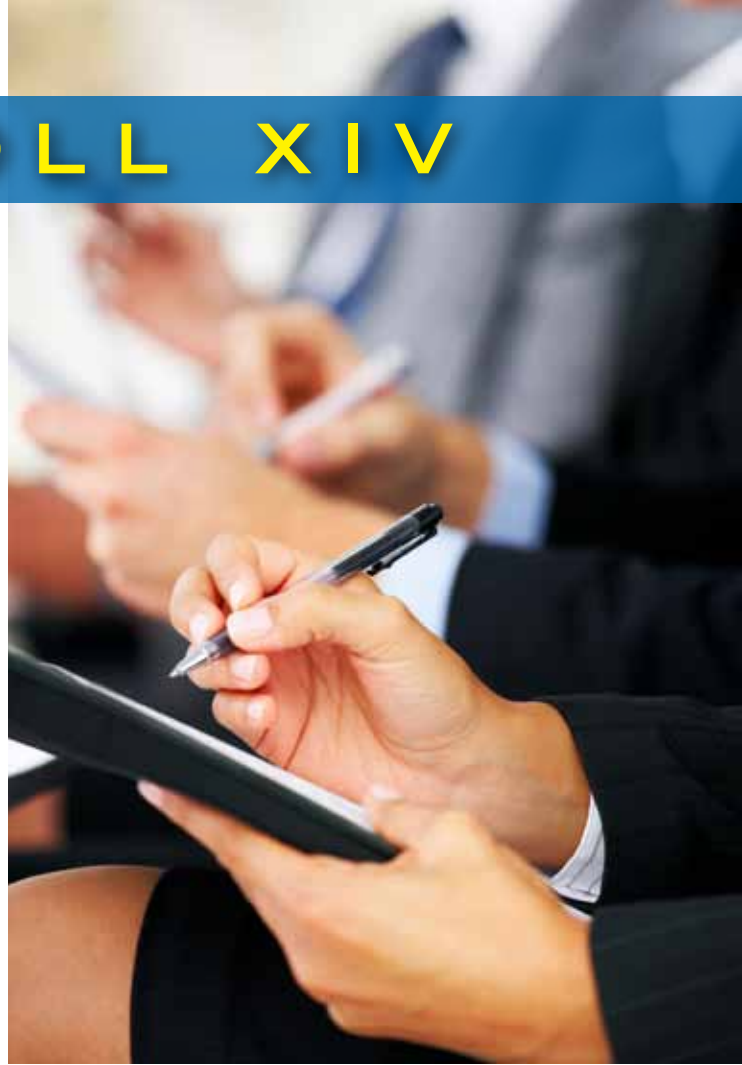
METROPOLL XIV

METROPOLL is a comprehensive syndicated study of the North American meeting market, conducted among a cross-section of major meeting site decision makers.

METROPOLL is particularly useful in establishing benchmarks and developing marketing and strategic plans designed to attract large conferences and conventions.

METROPOLL answers the following types of key questions:

- What are the key determinants in meeting site selection today?
- What strengths do destinations have to capitalize on?
- What are the images of leading North American cities as meeting sites and travel destinations?
- What unique image attributes can individual cities capitalize on in branding strategy?
- What steps do individual destinations need to take to attract more large conventions and retain existing clients?
- How does each city's marketing efforts compare to direct competitors?
- What key changes are emerging for the industry?
- What changes are emerging for individual destinations?



METROPOLL covers 40 major destinations in the United States and Canada and is conducted every two years. Reports are available to convention and visitor bureaus, convention centers, advertising agencies and trade media.

The **METROPOLL** report consists of two volumes. Volume I focuses on the site selection process. This information can be useful in the development of marketing and strategic plans. Volume II focuses on the market position of the subject destination. Topics covered include brand image, market share and other types of evaluative data.



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METROPOLL XIV

SAMPLE TABLE OF CONTENTS: VOLUME I

BACKGROUND	3
Meeting Locations Covered	4
RESEARCH TOPICS COVERED IN VOLUME I	5
RESEARCH APPROACH	7
HIGHLIGHTS OF FINDINGS	17
DETAILED FINDINGS	28
Past Visits and Familiarity With 40 Locations Covered by METROPOLL XIII	29
Major Meetings in the Past 3 Years	32
Rankings of 40 Locations With Respect to Intended Meeting Location in Next 3 Years	35
Characteristics of the Largest Meeting in the Past 12 Months	38
FACTORS UNDERLYING SELECTION OF CONVENTION SITES AND CONVENTION CENTERS	57
Likely Deterrents to Site Selection	60
Factors Underlying Selection of Convention Center	62
TRENDS IN SITE SELECTION CONSIDERATIONS	64
THE MARKETING OF MEETING LOCATIONS	
Relative Importance of Information Sources in Geographic Site Selection	77
Circulation and Readership of Trade Publications	82
OTHER FINDINGS	87
Trends in Exposure to Marketing Activity of Bureaus	88
“Top Ten” Sites for Large Trade Shows and International Conventions	90
“Top Ten” Sites for Excellent Hotel Meeting Facilities and “New/Expanded” Convention Center	91

MEETING LOCATIONS COVERED

METROPOLL covers the following 40 major meeting locations in the United States and Canada:

WESTERN U.S.

Anaheim
Hawaii
Las Vegas
Los Angeles
Phoenix
Portland
Sacramento
San Diego
San Francisco
San Jose
Scottsdale
Seattle

CENTRAL U.S.

Austin
Chicago
Dallas
Denver
Houston
Minneapolis
Nashville
New Orleans
San Antonio

EASTERN U.S.

Atlanta
Baltimore
Boston
Charlotte
Indianapolis
Jacksonville
Miami
New York
Orlando
Philadelphia
Puerto Rico
Washington, D.C.

CANADA

Calgary
Edmonton
Montreal
Ottawa
Quebec City
Toronto
Vancouver

TOPICS COVERED IN VOLUME II

Volume II is custom-tailored to each destination and focuses on that destination’s position in the North American meeting market, relative to the norms developed in METROPOLL. Among topics covered in this confidential report (made available to subscribers only) are:

- Past visits to destination
- Major meetings held in past two years
- Major meetings intended in next two years
- Claimed exposure to marketing activity
- Overall evaluation of city as a vacation destination
- Overall evaluation of city as a convention and incentive site
- Convention center image of city
- Travel image of city with respect to both positive and negative attributes
- Reputation of hotel and convention center meeting facilities

“ADD ON” STUDY

Still want more individualized information? Most subscribers also choose to conduct an additional survey using a list of planners provided by the destination, to help identify strengths and weaknesses, from those who have actually visited. In this report, the destination can also select who they want to be compared to. For more information contact info@str.com.

MEETINGPOLL: Our team also conducts customized studies on a variety of meeting related topics.

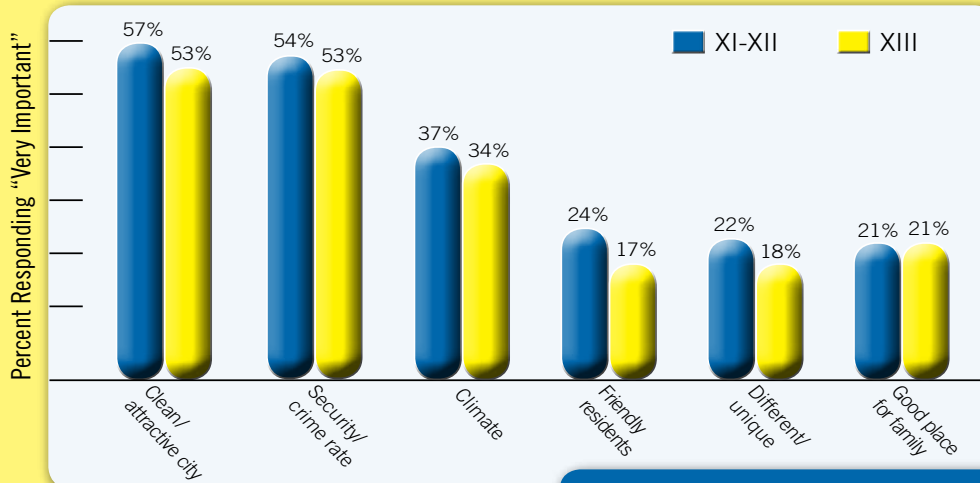


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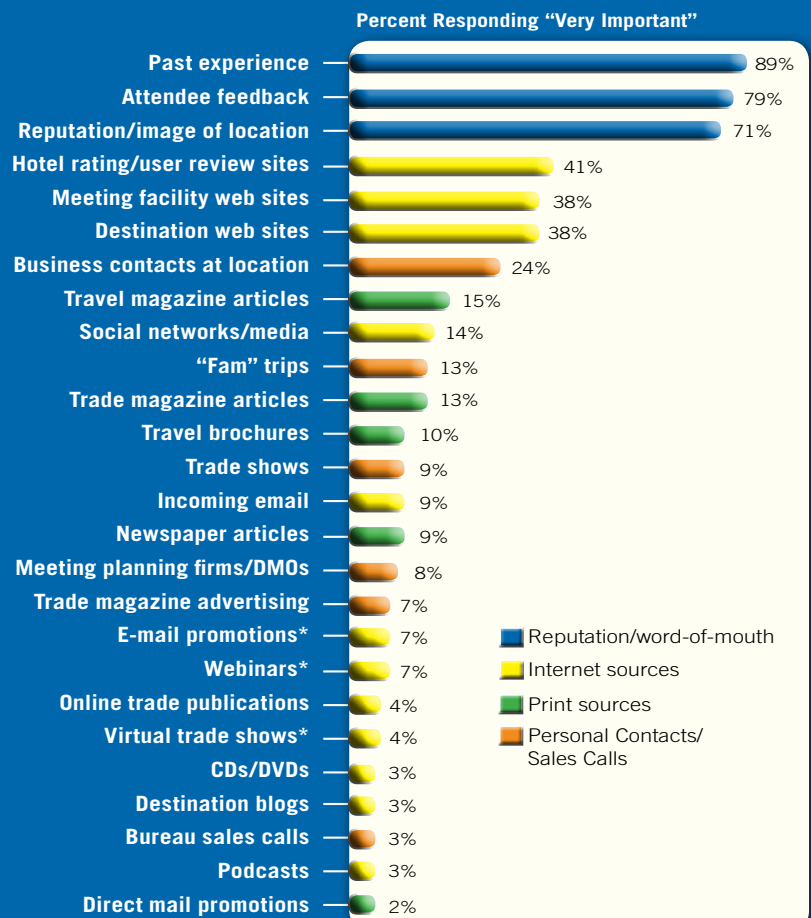
Importance of Short-Term Environmental Trends in Site Selection METROPOLL XI-XII vs. XIII



KEY BENEFITS OF METROPOLL

- See what strengths to maximize and weaknesses to minimize, based on an accurate assessment of target market requirements--both real and perceived.
- Demonstrate to other municipal entities the importance of programs and services that promote a positive image, such as safety, sanitation, etc.
- Improve/expand facilities, based on objective evidence of market need.
- Track the effectiveness of your marketing efforts in terms of advertising awareness and market share, based on 25 years of METROPOLL trend data.
- Learn where to spend your marketing and advertising dollars most efficiently.

Importance of Information Sources When Selecting a Geographic Site



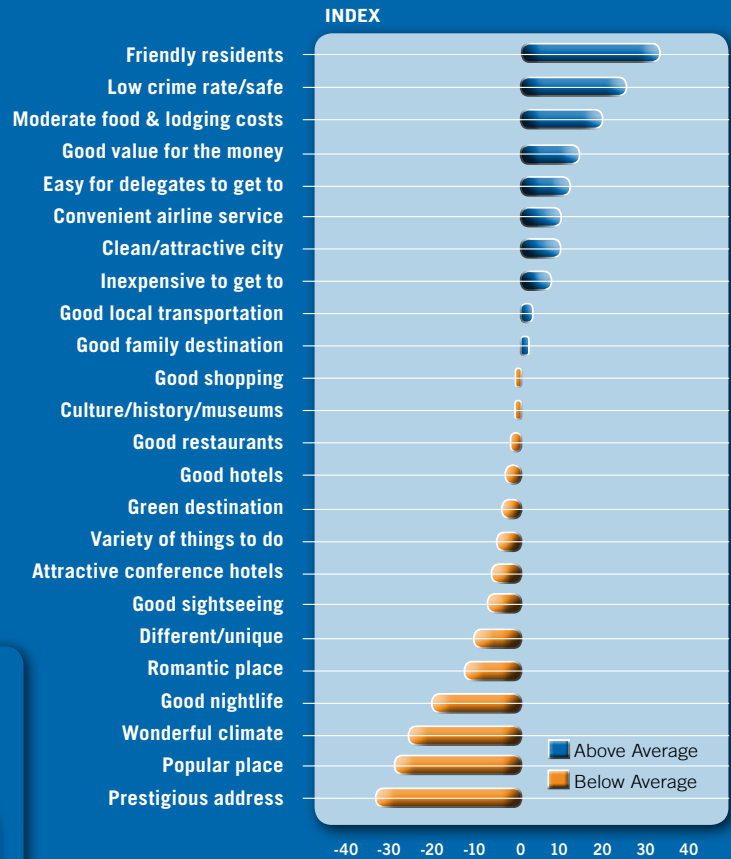
*covered for the first time in METROPOLL XIII

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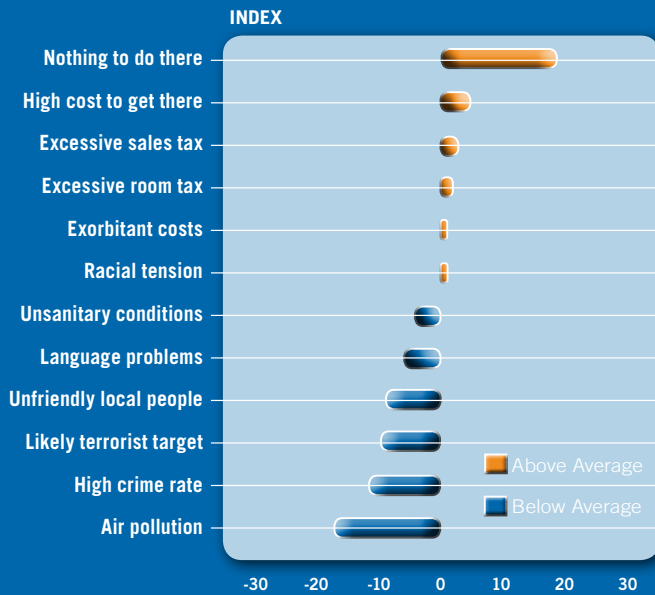
METROPOLL XIV VOLUME I analyzes and charts the issues mentioned below to help you gain complete understanding of market:

- Characteristics of the **Largest Meeting Held in the Past 12 Months.**
 - Location of meetings (by country, state or province and city)
 - Category of these meetings
 - Attendance and attendee characteristics
 - Facility, computer and trade exhibit requirements
 - Planning and travel patterns
 - Room rates and registration fees
- Importance of **26 logistical, environmental and recreational considerations** in the selection of a destination for a major meeting or convention in the U.S. and Canada. Topics include travel logistics, quality of facilities, costs, safety, quality of environment, sustainability policies, environmental initiatives and recreational opportunities.
- Importance of **16 possible deterrents** to the selection of a specific city for a major meeting or convention. Topics include concerns with safety, pollution, costs, recreation, transportation issues, and the **"AIG Effect."**

Example of a Destination TRAVEL IMAGE PROFILE



Example of a Destination NEGATIVE TRAVEL IMAGE PROFILE*



*In the case of negative attributes, a high index is undesirable.

Source: METROPOLL XIII

- Importance of **22 considerations in the assessment of a convention center.** Topics include concerns about capacity, support staff, specific facilities, greening policies, location and costs.
- Importance of **26 information sources** in the selection of a geographic location for a major meeting in North America. Information sources covered include emerging e-marketing channels.
- Relative importance of **specific types of websites** for various aspects of meeting planning. These include hotel, convention center and trade media websites.
- Impact of **economic downturn on meeting planning.**
 - Number of meetings canceled or postponed (if any)
 - Average size of meetings canceled or postponed (if any)
 - Types of meetings canceled or postponed
 - Anticipated decline in meeting attendance
 - Anticipated decline in meeting budget
 - Switching behavior: Whether the organization has switched to a more affordable destination, meeting facility, accommodations or transportation mode

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You may also be interested in these products...

OFFERED BY STR

Destination Reports

Designed for destination marketing organizations and convention and visitor bureaus (CVBs), **Destination Reports** provide information on occupancy, ADR, RevPAR, and hotel supply and demand on your chosen destinations to effectively track your destination and competitors worldwide. Destination Reports allow you to compare the local market to competitor markets, assist you in reviewing market performance and help support your business strategies. Destination Reports can track the effects of local events such as festivals, conventions and holidays.

Hotel Market Forecasts

Hotel Market Forecasts are the ultimate resource for anticipating the future performance of your market's key metrics – occupancy, ADR, and RevPAR. Hotel Market Forecasts draw upon historical hotel performance data, key hotel demand drivers and economic indicators at both the market, domestic and international level to predict future performance for up to two years. Hotel Market Forecasts can help you understand how current economic conditions will impact performance and anticipate changes in the business environment. Hotel Market Forecasts are updated on a monthly basis to ensure you stay ahead of the ever-changing market. STR and STR Global currently produce Hotel Market Forecasts for the top 25 U.S. markets, the top European markets and Dubai.

Market Pipeline Reports

Market Pipeline Reports provide critical information about where a market has been and where it is going. Reports display both current and historic supply trends and detail the changes in existing supply during the past 12 months and 60 months (openings, room additions and removals, conversions and closings). Market Pipeline Reports also provide specific property data for existing hotels, including room count, meeting space, open/close dates, and owner and architect information. These reports can help you find out where there are opportunities for new construction or prepare you for competition coming into the market.

OFFERED BY RRC ASSOCIATES

Visitor Profile Studies

Visitor profile studies are essential in understanding the full spectrum of your visitors, particularly leisure travelers. To obtain the highest-quality data, RRC Associates typically utilizes intercept interviews along with follow-up surveys via email or the web. Demographics, purpose of trip, prior visits, satisfaction, perceptions, geographic origin, and many other characteristics can be profiled.

Special Event Surveys

Using surveys, either intercept or email, can be an excellent way to profile attendees at your special events and document patterns and economic (ROI) impact. Geographic evaluations and “compression” analyses are also effective tools.

Economic Impact Studies

Economic impact studies use primary survey research from visitors, along with occupancy and ADR data, to determine an overall tourism economic and ROI impact.

Conversion Studies

A conversion study follows up with your database of inquirers by asking whether the individual visited or not. Those who did visit are profiled and an ROI for the media campaign is calculated.

Image and Branding Studies

Image and branding studies normally capture feedback from both visitors and non-visitors, documenting perceptions, strengths and weaknesses, competition, and other feedback. Surveys, focus groups, interviews, and other methodologies can be used for such projects.

Focus Groups

Focus groups are helpful in probing more complex issues, getting feedback on advertising or other media, and discussing new products or services. RRC Associates can provide the full range of services for focus groups, including recruiting, incentives, discussion guide creation, moderating time, and report summary.



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