

FirstLookResearch

# Site- Selection Priorities

2021 AND BEYOND



**E**ighty-one percent of meeting planners report that their priorities have changed as a result of Covid-19, but the number-one factor driving site-selection decisions has little to do with the pandemic. Of utmost importance, according to the latest First Look Research by Northstar Meetings Group, is a destination’s reputation. Affordability — while always a key factor — ranks second among priorities, as many organizations struggle to regain profitability after a year of widespread economic hardship.

This first-in-class study, “Site-Selection Priorities: 2021 and Beyond,” details how the global pandemic and other significant challenges in 2020 have influenced planners’ decisions regarding where to hold future gatherings. The online survey was conducted March 3-18, 2021, and sponsored by Visit Orlando. Findings are based on 603 qualified meeting planner responses from North America-based meeting professionals representing the corporate, association, independent/third-party and incentive markets.

Among the highlights of the study:

• **PRIORITIES HAVE SHIFTED.**

Eighty-one percent of planners say their site-selection process has changed as a result

of Covid-19, either significantly (47 percent) or somewhat (34 percent).

• **CORPORATE IS MORE CAUTIOUS.**

New imperatives are more evident among in-house corporate planners than associations or third-parties: 55 percent of corporate respondents say Covid-19 has significantly changed their priorities, while only 34 percent of association planners report that their decisions have been strongly influenced by the pandemic.

Independent and third-party planners, who might represent a wide range of clients, fall between their corporate and association colleagues in terms of Covid-19’s impact on their destination decisions.

• **SECURITY IS A KEY CONCERN.**

While Covid-19 is a key driver of changing priorities, sociopolitical challenges — including protests against racial inequality and the uprising at the Capitol — have influenced decisions, too. Thirty-seven percent of planners say recent civil unrest factors into their decisions. A majority are likely to avoid cities with high crime rates, as well as sites of recent upheaval. Assessing the availability of police and security forces is a high priority among respondents.

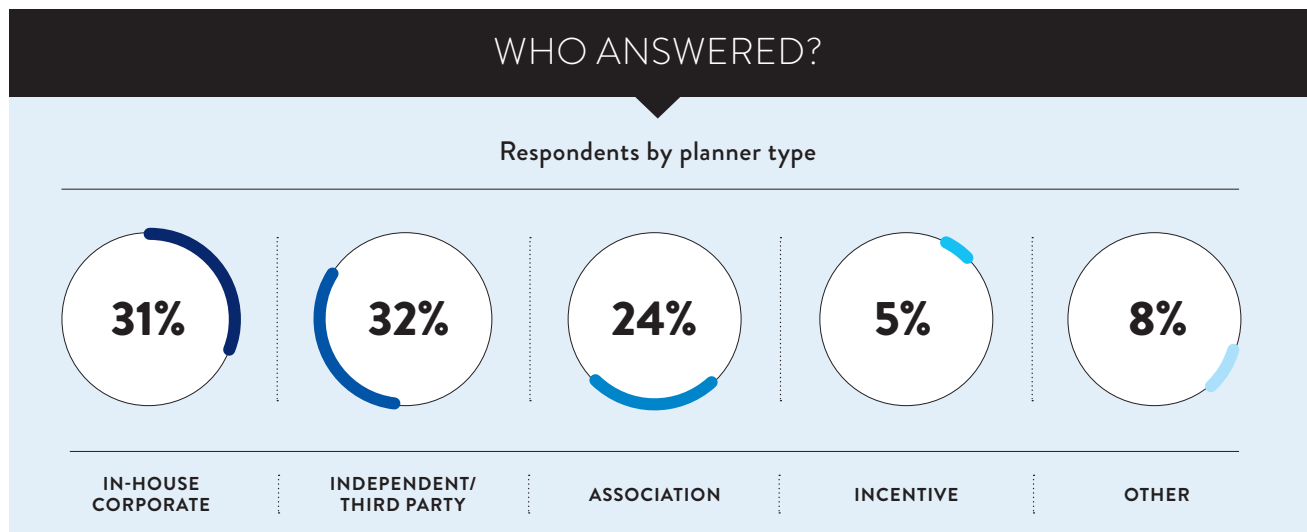
**COVID-19 INFLUENCES MOST PLANNERS’ DESTINATION DECISIONS, BUT A PLACE’S REPUTATION IS, BY FAR, THE MOST IMPORTANT SELLING POINT, FOLLOWED BY THE COST OF AIR, HOTEL AND F&B.**

• **PANDEMIC RESTRICTIONS MATTER.**

Nearly all planners (94 percent) always or sometimes consider state and local guidelines when choosing destinations for future events. A greater number of survey respondents prefer destinations with strict health-safety policies in place, such as mask mandates and gathering limits, rather than minimal protocols.

• **PRICING IS PARAMOUNT.**

Affordable flights, hotels and F&B are important to 99 percent of respondents. Among respondents’ comments, many conveyed similar sentiments to the one who noted, “More than ever, it’s about cost now.”



### Essential qualities of a place

A destination's strongest selling point, by far, is a good reputation. Second and a close third in importance of location characteristics: a favorable climate and the availability of robust bandwidth for hybrid events. Interestingly, a site's intellectual capital is deemed more important than its culinary reputation.

Cost significantly outranks all other logistical concerns, with a score second only to reputation as a deciding factor overall.

The cost of air, hotel and F&B is most crucial for association planners, 85 percent of whom deem it "very important." Not only must these planners entice their members to attend events, but they are also typically working with strict budget constraints, even in the best of times.

Among other logistical priorities across planner types, ample airlift ranks next in importance, followed by easy driving distance for participants.

Clearly, getting people to the destination is more important than getting them around town. Local traffic congestion, public-transit systems and train access are low priorities for survey respondents.

### Covid-safety restrictions

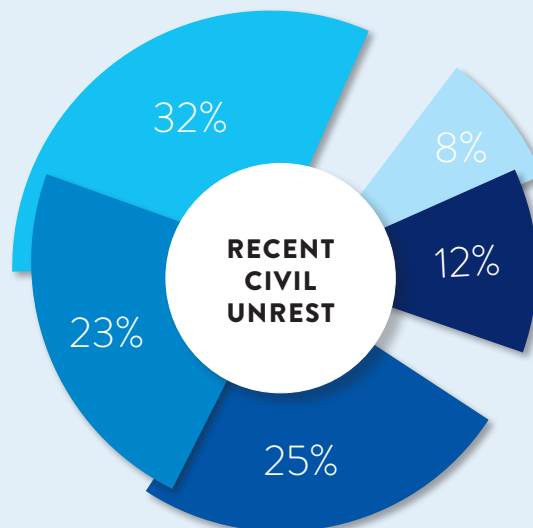
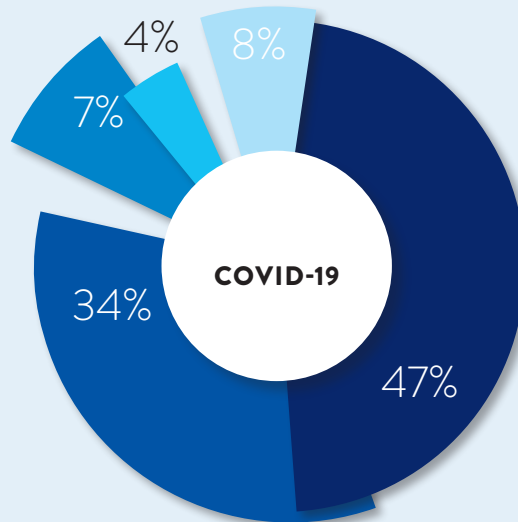
Some groups favor destinations that don't impose gathering limits or mask mandates (ranked 1.0 in importance on a 3-point scale, with 3 being very important), but respondents show a stronger preference for places with stricter health-safety policies and a culture that consistently adheres to those rules (ranked 1.58).

"To be clear, the city must have strict Covid policies and a legislature that believes in following the science," commented one respondent. "Anti-masker places and cities lifting the Covid restrictions are a NO GO for the event participants we've polled. They have grave concerns about going into cities where the number of Covid cases might increase due to lax restrictions."

The current prevalence of Covid-19 cas-

## CURRENT EVENTS

Have your site-selection priorities changed due to these factors?



■ YES, SIGNIFICANTLY 
 ■ SOMEWHAT 
 ■ NOT MUCH 
 ■ NOT AT ALL 
 ■ NOT CURRENTLY PLANNING IN-PERSON EVENTS

es in the destination is a high priority, too, followed by health and safety certifications such as the GBAC Star designation from the Global Biorisk Advisory Council.

Few respondents are counting on hotels or convention centers to offer Covid testing; these options are less important to respondents than other health-safety measures. It's possible that planners will ask attendees to

provide proof of vaccination or negative test results before arrival, or that they expect testing will be unnecessary as more participants are fully vaccinated and the threat of the virus subsides.

**Personal connections have an edge**

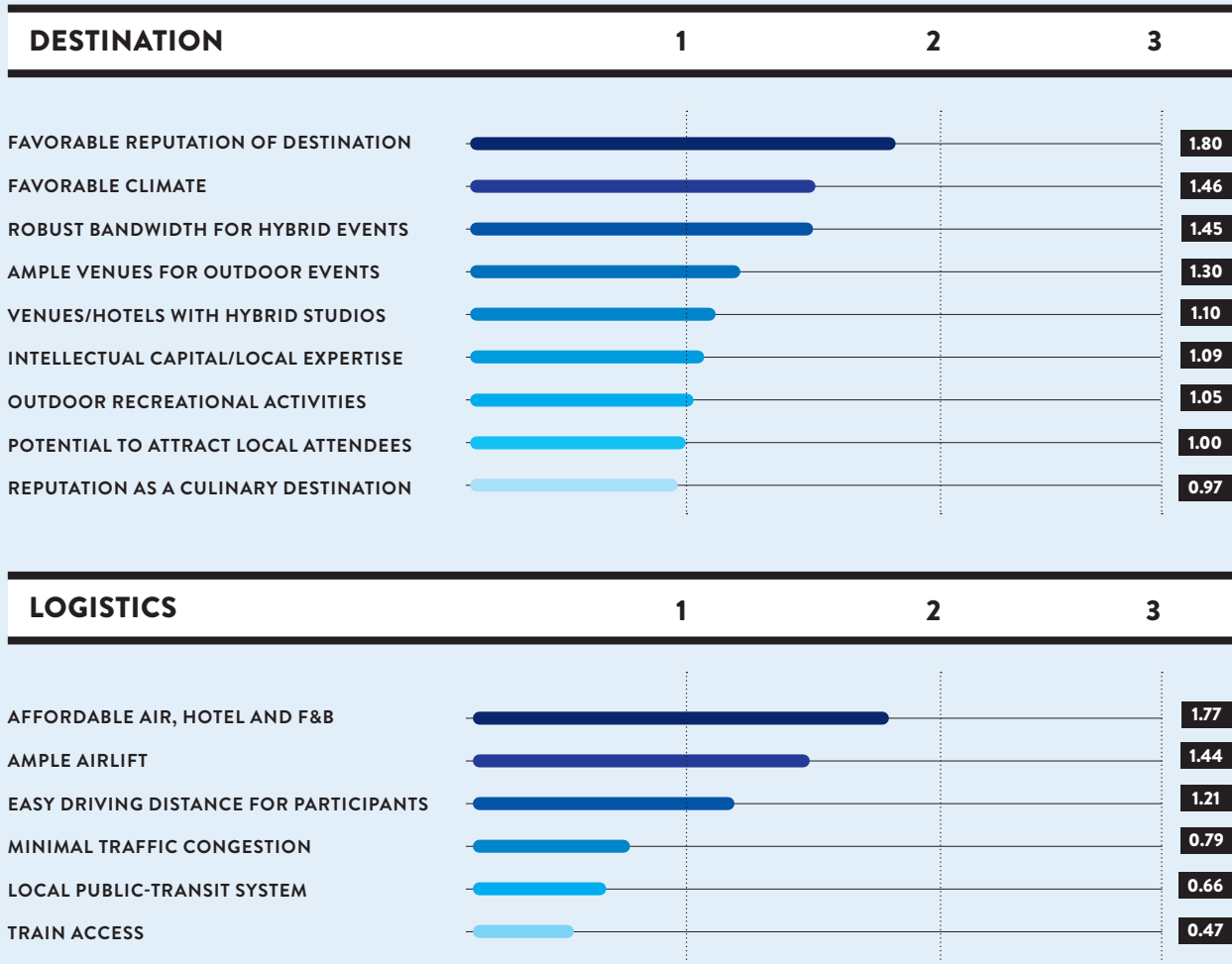
Planners prefer to work with people they

know and places they like. Respondents are likely to prioritize hotels where they have a personal contact, choose destinations they've experienced before, or favor a city where they know someone at the convention and visitors bureau.

Karma is a factor too, some planners noted. "We are prioritizing venues that worked things out with groups during the pandem-

PLANNERS' PRIORITIES

How important are these factors in your site-selection decisions?



ic, and avoiding those that did not,” said one respondent. Another commented: “I will remember properties/venues that have been flexible with cancellations and changes.”

One planner complained of suppliers passing along “excess costs” for Covid-safety, such as additional space: “CVB staff who are unwilling to seek solutions now never will respect our business moving forward. We are willing to risk capital in launching new events. If we cannot get help on the basics, we cannot bet on a city for any new event.”

**Hot topics can sway decisions**

Safety and security concerns — either real or

perceived — weigh heavily in the selection process. Nearly one in 10 planners say they won’t meet in capital cities, and 30 percent are on the fence about that decision.

Interestingly, a destination’s political leanings are either definitely or potentially a deciding factor for about one in three planners. Neither blue nor red has a distinct advan-

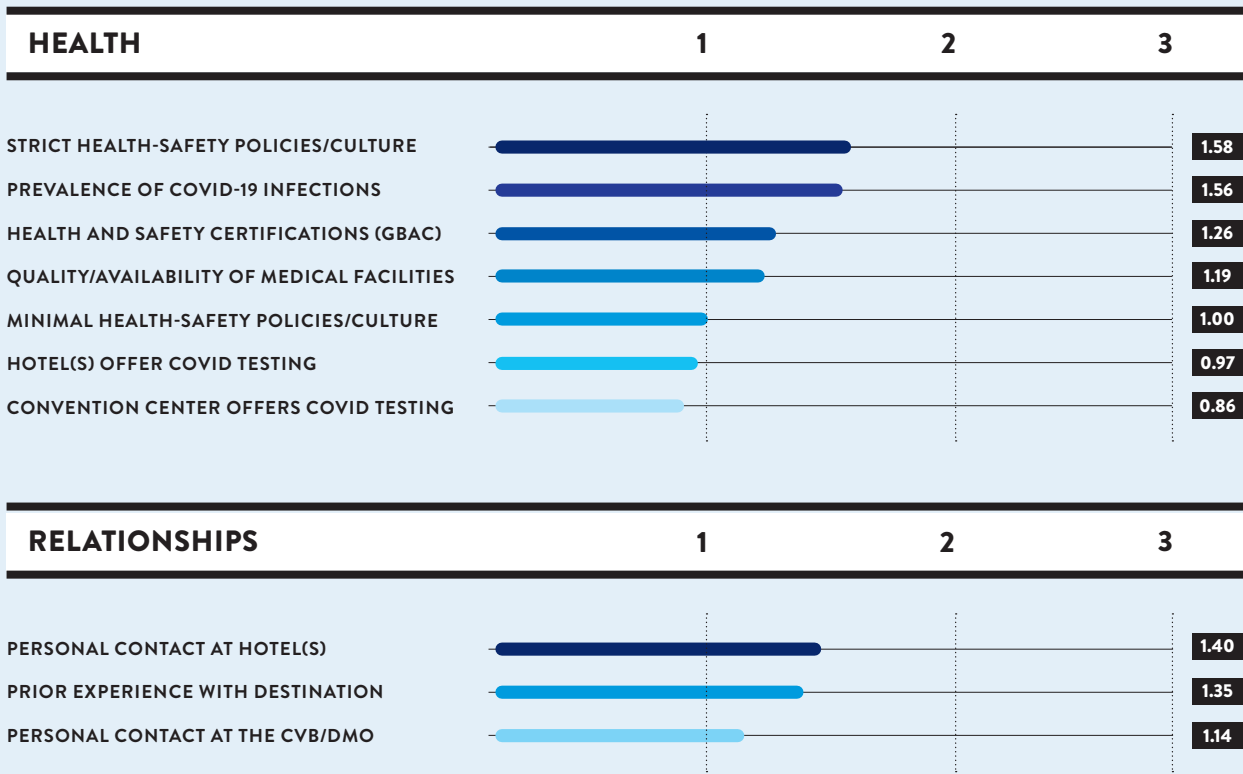
tage: Slightly more planners might avoid cities perceived as “far right” (36 percent) than those who won’t go to places deemed “far left” (33 percent).

Several respondents stressed the importance of inclusivity. “We look for a destination that is LGBTQ-friendly, African American and interracial-friendly, and has green

**“WE ARE PRIORITIZING VENUES THAT WORKED THINGS OUT WITH GROUPS DURING THE PANDEMIC, AND AVOIDING THOSE THAT DID NOT,” SAID ONE RESPONDENT.**

**PLANNERS’ PRIORITIES**

How important are these factors in your site-selection decisions?



and DEI (diversity, equity and inclusion) policies,” a planner stated. “I will not work with hotels, suppliers or destinations that are not 100 percent sensitive to race relations,” another noted.

The legalization of cannabis, though controversial, is not a significant deterrent to selecting a destination: Just 5 percent say they’ll avoid states that have legalized it; another 13 percent will “maybe” steer clear.

### Seeing is believing

Out of heightened concern for attendee welfare, several respondents commented that site inspections are more important than ever. Among comments: “I now have to do a site visit for each hotel to ensure the safety of my participants,” and “I do more research into a destination now: crime statistics, neighborhood safety, police presence, etc.”

Some appreciate the option of “visiting” from afar. “Virtual site tours have changed our way of doing things,” a respondent noted. “We do not have to travel so much in order to actually book a property. This is saving us so much time and money.”

Among other pluses, one respondent likes to receive “an abundance of ideas, pictures and experiences on how to execute events in today’s new environment.”

### Planning around the unknowns

State and local gathering restrictions are fluid, but they are important to nearly all meeting planners. Almost half (47 percent) always weigh current guidelines when choosing a destination, and another 47 percent say this is sometimes a consideration in their decisions. “We have to consider current restrictions and then guess what the conditions will be during the dates of our conference,” said a respondent.

In 2020, many sources projected that large national or international gatherings would be shelved for the long haul, but in fact only one in four respondents (27 percent) have decided to replace such events with smaller regional meetings. Forty-four percent have no plans to do so.

Many planners expressed how difficult it is to book future events when Covid-19 still presents so many unknowns. “It is a daily challenge to evaluate the next steps. Logic

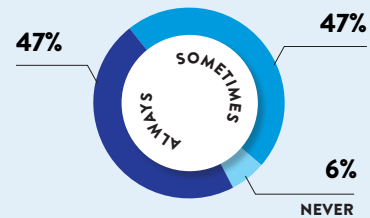
and critical thinking are essential during this process,” a respondent noted. “We are all definitely rewriting the playbook!”

### Be a partner

Results of this First Look Research suggest that most planners are not anticipating a return to business as usual, and the upheaval of the past year is likely to have ramifications on site selection for the foreseeable future. They’re seeking destination partners who can find mutually agreeable solutions and reassure them that safety is a priority.

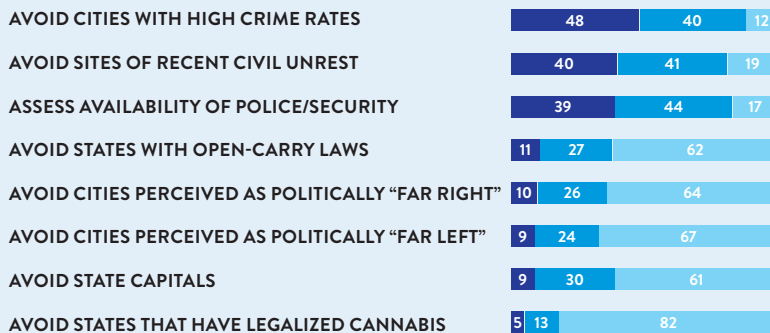
## PLANNING AHEAD

Do current state and local gathering restrictions influence your likelihood of booking a destination for a future event?



## SAFETY MEASURES

Will you do any of the following as a result of security concerns?



■ YES ■ MAYBE ■ NO

## CLOSER TO HOME?

Will you replace any national or international events with smaller regional meetings?

