it's time

A Global Report on Destination Marketing and Communications

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INTRODUCTION

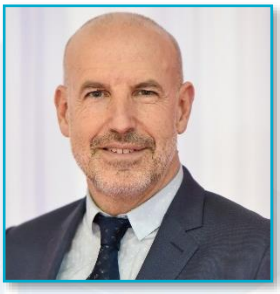
The global business events community has been severely impacted by the pandemic, as have destinations around the world and their vital supply chains and eco-systems. But ours is a resilient and spirited industry, one which is vital to both economic and societal recovery.

Business events destinations, towns, cities, countries, do so much more than just deliver delegates and visitors. They are essential centres that drive trade and investment, support the sharing of knowledge, improve health and community engagement and use our skills and expertise to deliver policy objectives which ultimately improve people's lives.

As we all look to the future, marketing and communications will be so crucial in building demand, but also to underline and value the importance of business events of all kinds and the incredible impact and change they can deliver. This is why we agreed to partner on this important piece of research.

We have worked closely alongside our global PR and communications partner, davies tanner, to produce this report, and are grateful to them and their team, and to all of the destinations that took the time to respond. Your input has been incredibly valuable and will ultimately help inform and support the wider business events community as we all begin our long-awaited journey to recovery and renewal.

Thank you again to everyone that has contributed, and I look forward to seeing all of you, in person, very soon.



Claude Blanc
Portfolio Director
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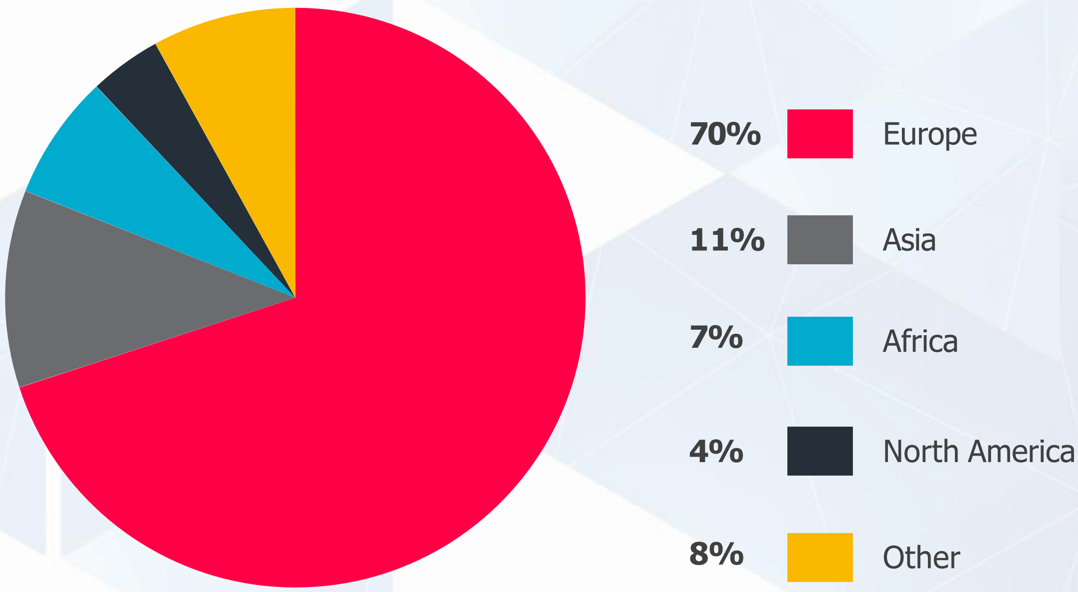
ibtm

SAMPLE & METHODOLOGY

During the period November 12th 2020 – January 15th 2021, a sample of 224 organisations were surveyed via an online platform.

The organisations were a combination of city, regional and national convention bureaux and destination marketing organisations who specifically market, promote and attract business events to their destinations.

Those organisations surveyed came from the following geographic regions:



A total of twelve questions were posed, principally with a selection of multiple-choice responses.

Of the total responses received, one was duplicated and one was deemed to be incomplete, and were therefore removed from the final summary of results.

The draft report was then shared for review and comment with a panel of senior destination leaders from the UK, Europe and North America prior to final sign off and publication.

All of the responses received were treated as completely confidential.

SUMMARY

Destination marketing is going to be crucial in not only rebuilding a damaged global business events industry, but also to drive a much wider economic recovery, as many sectors look to reengage with their audiences and markets.

What is very obvious, is that despite the worst global crisis in our recent history, the vast majority of destinations have continued to remain engaged with their audiences, albeit through different channels and mediums. As you might expect, those channels have been predominately digital, although looking forward, our respondents see live and face to face marketing activity returning relatively quickly, although perhaps not at pre-pandemic levels.

One area that was a little surprising, was the need to get back quickly to attending trade shows. However more interestingly, once you drill down on this question, was not purely a desire to simply get back to a sales setting, but to use the trade show environment to conduct real time market research in an effort to develop longer term strategies, and also to rebuild a network and pipeline that has been severely disrupted during the past 12 months.

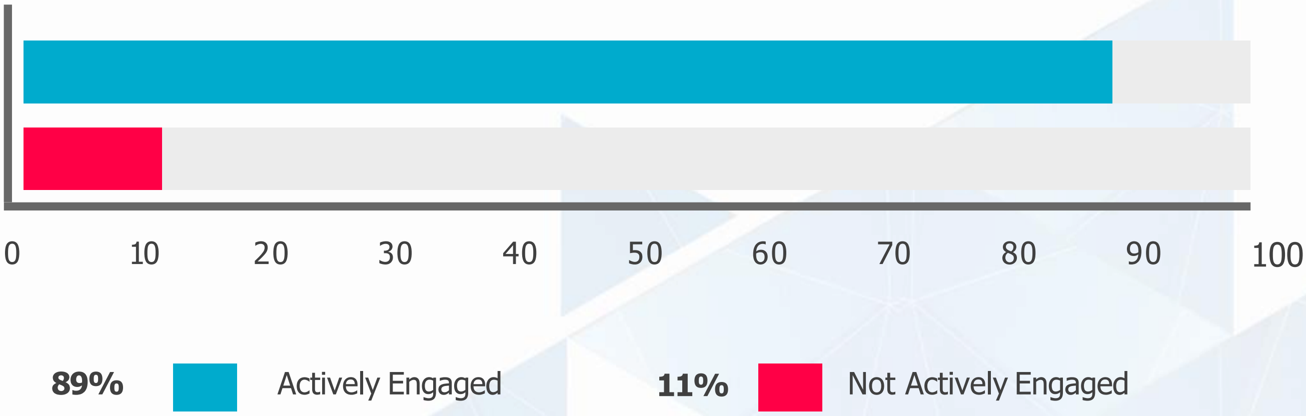
A fairly significant indication of increases in short term funding in marketing activity, and also various forms of subvention, also points towards a highly competitive landscape among destinations, once the global business events environment returns to some degree of normality.

What is apparent, is that business events will continue to play an important role in what will continue to be a very fast moving and highly complex environment, and one where the function of destinations in delivering those events, will undoubtably need to evolve and continue to be ever more critical.

Given the data within this report was generated between November 2020 – January 2021, it is our intention to repeat the survey from April 2021, to ensure we continue to be able to provide an accurate and current picture of the market.

ENGAGEMENT

We began by asking to what extent destinations had remained actively engaged with their buyer and stakeholder audiences during the survey period.



The lack of regular engagement from more than 10% of respondents is due to a number of factors; from additional comments provided and other evidence received, it is apparent that some destinations were forced to furlough staff at several levels due to the lack of enquiries. This in turn would have course resulted in a reduction in outbound marketing activity and engagement. In some cases, particularly where the organisation is more directly managed by government, resources have been redeployed to support other areas critical during the pandemic and sadly some have been made redundant.

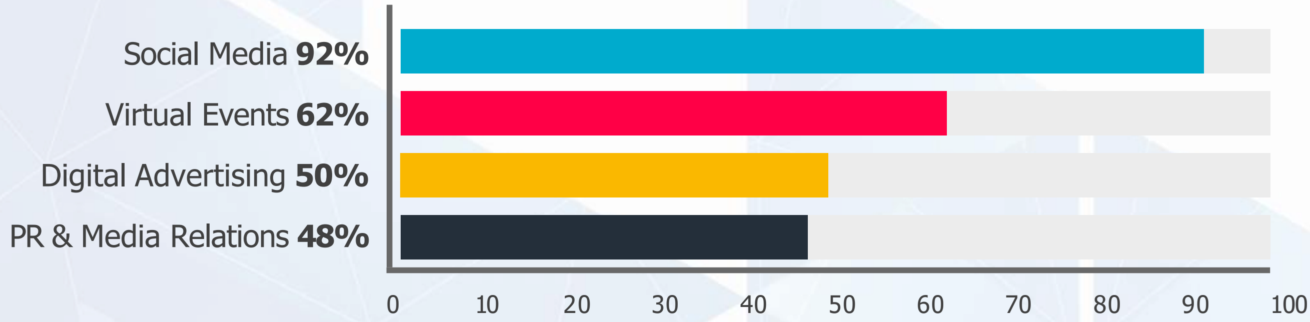
Disappointingly, some respondents have stated that their lack of engagement has been due to direct instructions from government, where there has effectively been a block on all external marketing communications, especially during periods of lockdown. While this can be understood in some circumstances, this is likely to have a negative effect on audience engagement in the longer term and will not aid a speedy recovery as the share and level of voice will ultimately be adversely impacted.

As we have found in research conducted after other crises, those destinations who continue to actively engage with their target markets, and indeed choose to invest further, have a far more rapid period of recovery and a more successful business model over the long term.

CHANNELS

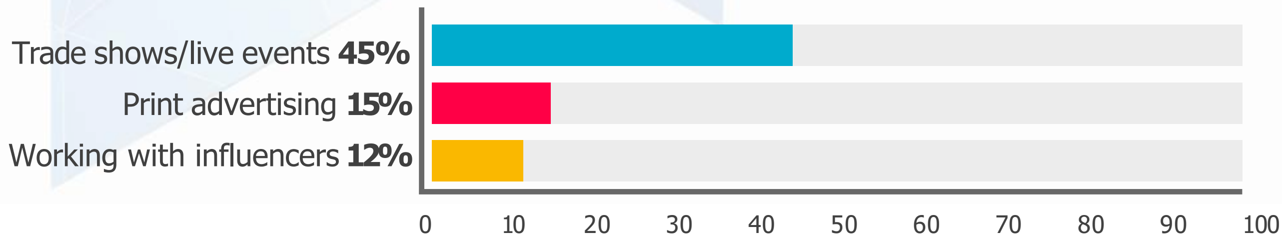
Those 89% of destinations that have continued to engage with their audiences during the pandemic, have done so through using a wide variety of channels.

Not surprisingly, the more traditional marcomms channels have been displaced during this period and replaced by predominately digital solutions, or at least those that do not require a level of face-to-face engagement.



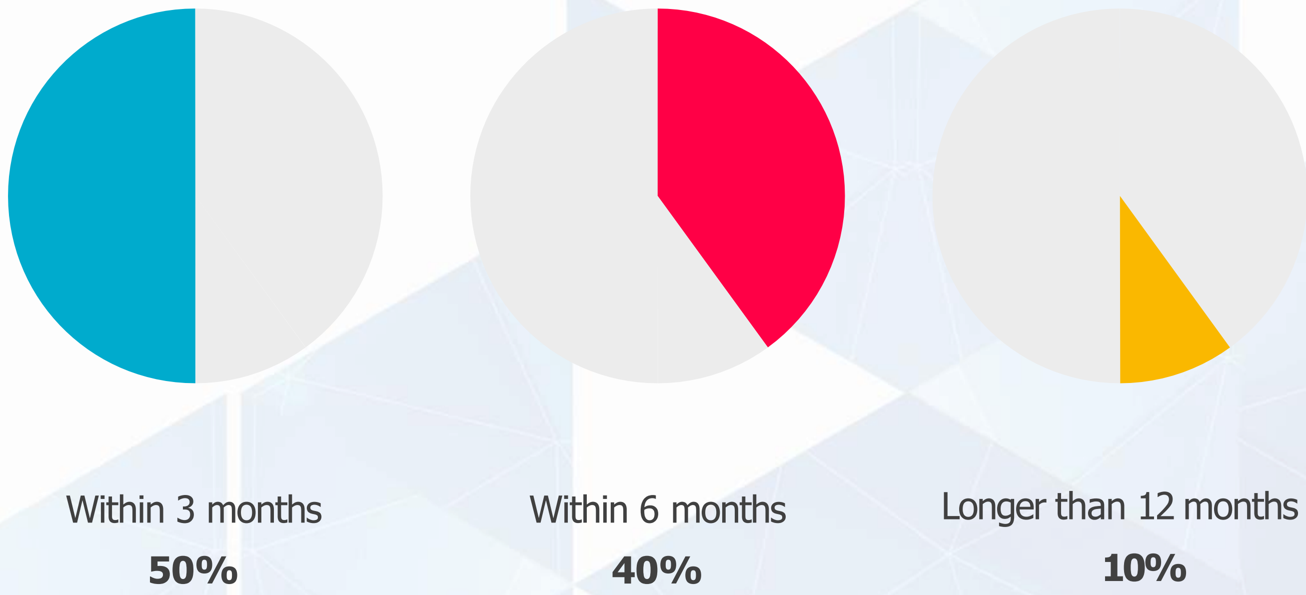
Virtual events had a high level of take up, as many live events were forced to switch to a more virtual or hybrid solution, and digital advertising and PR and media relations also remained buoyant.

However, not all activity has been digital during the period, although much of this probably took place in the early part of the year, outside of full lockdown or during periods where local restrictions were at their lowest.



TIMELINE

We then went on to ask our respondents when they believed they would return to a full programme of market engagement, if they had not already done so. Exactly half projected they would do so within three months, projecting a timeline of around February – March 2021.



However, a significant number, 40%, felt their engagement timeline would be twice that at six months, projecting an extended timeline of April – June 2021.

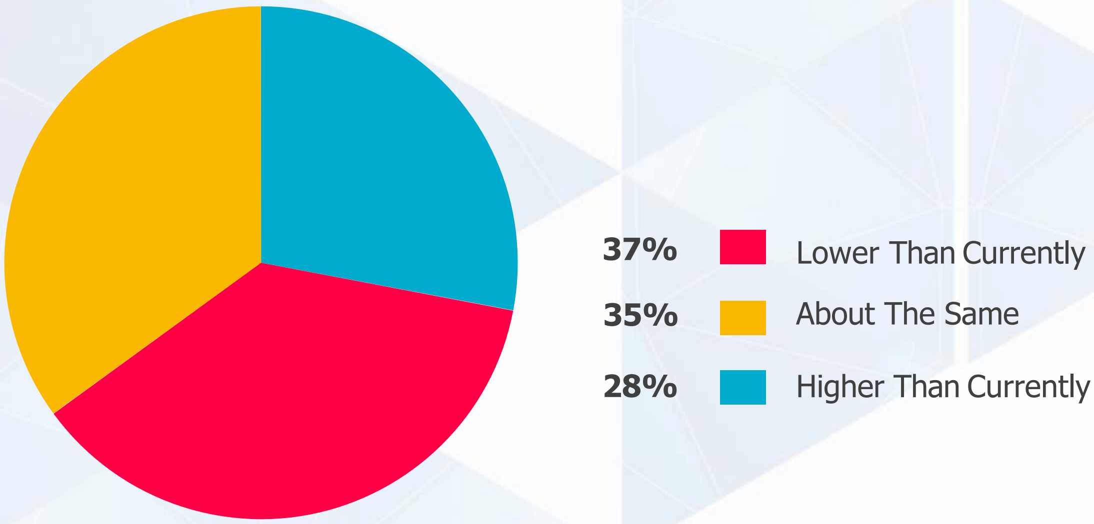
A far smaller percentage, just 10%, projected a feeling of more caution, believing their destinations will not be beginning a full programme of engagement for approximately 12 months, meaning they will not fully return to market until the latter part of 2021 at the earliest.

Given this survey was conducted during November 2020 – January 2021, we should caution that, given how quickly the situation is changing on a regional and global level, that these results may well continue to evolve as the recovery period itself moves forward.

INVESTMENT

Forward investment in marketing activities is going to be crucial for those destinations looking to recover quickly post pandemic, and also in support of their own local event infrastructure and supply chain. It also has the potential to change the entire order and dynamic of the leading destinations, particularly those who are slower to emerge from national and international travel restrictions.

We asked if destinations felt they would be investing more, less or about the same in their marketing activities over the coming 12 months.



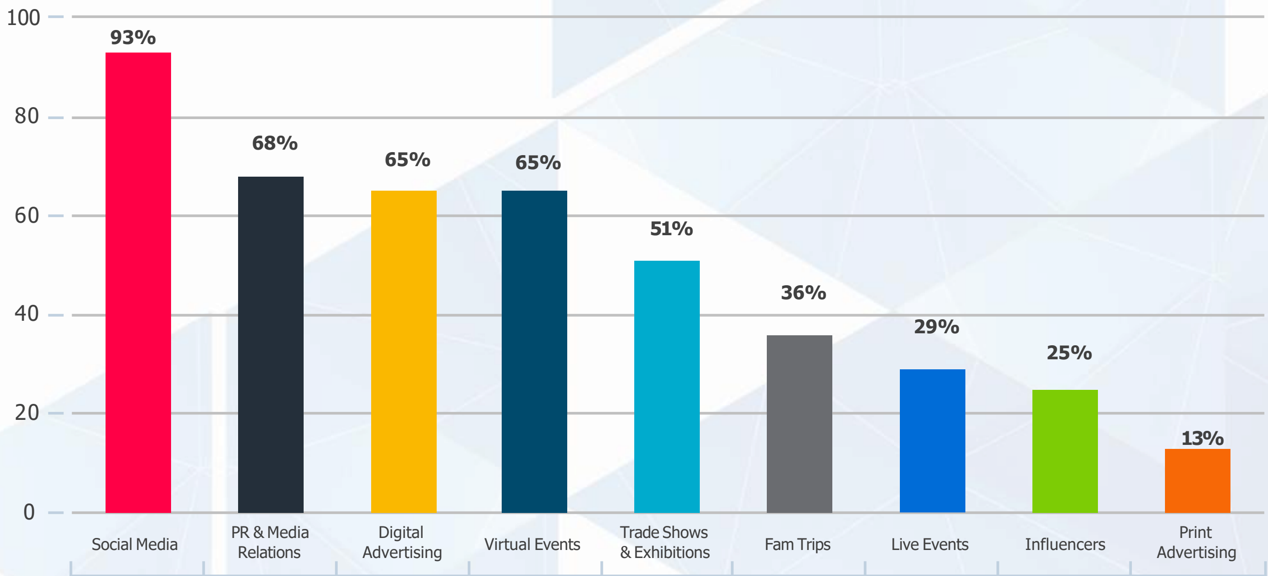
The smallest percentage, 28%, said that their investment in marketing would be higher than currently. 37% felt their overall marketing spend this year would be reduced, whereas 35% indicated it would be the same as in previous years.

To put some balance to this; given many governments, both national and city wide, are still working through the significant financial challenges they are facing, and agreeing their budget priorities for the coming year, it may be slightly premature to project this accurately, and may well be needed to revisit later in the year.

COMMUNICATIONS

Choosing the most effective channels to engage with key buyer and stakeholder audiences over the coming months and years is going to be crucial in aiding a strong global recovery in the business events sector. Ultimately, the strategy and approach to this will determine a destinations long term success and status.

We asked destinations which channels they felt they were most likely to use over the year ahead.



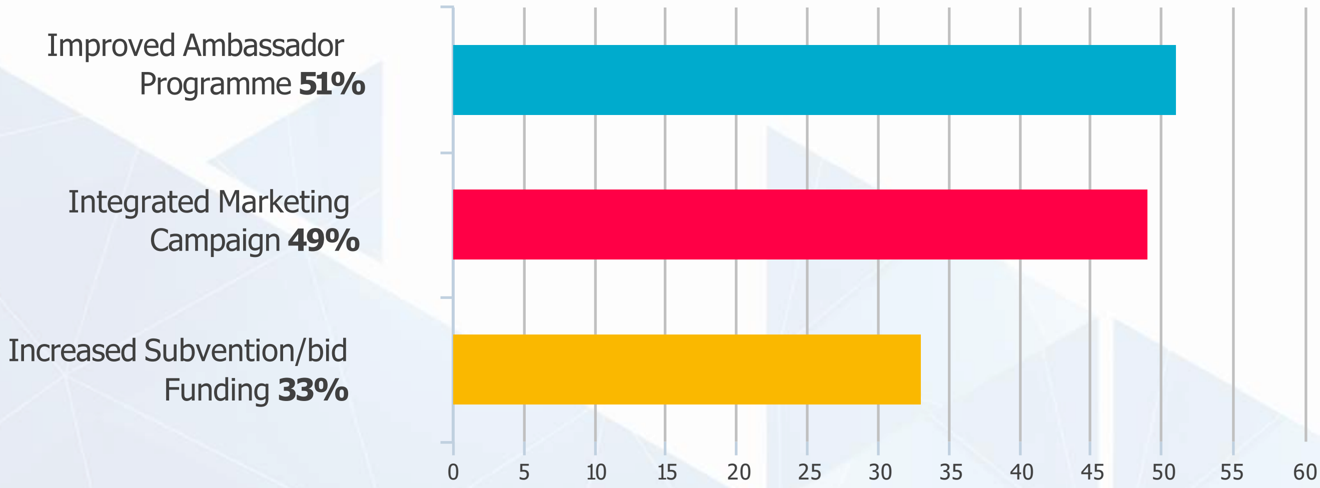
As you would expect, given a return to face to face activity is likely to be gradual, social media ranked highest at 93%. PR and media relations were second at 68%, highlighting the importance of securing trusted news and content via earned media and third-party sources.

What was interesting, but also encouraging, was that more than 50% of respondents see trade shows and exhibitions as a vital part of their mix for the year ahead, despite the current restrictions. This is not just based on a need to 'get back to business' but also to use trade shows as way to conduct real time market research with their audience and also to build a pipeline and network that has been severely disrupted during the pandemic.

A further 36% are eyeing the return of destination fam trips and 29% other forms of live events, underlining the importance of personal engagement with buyers. These events are forecast to be smaller, but more frequent, with events being more community or sector specific. Perhaps not so good for traditional publications and media outlets, was the result that only 13% are planning to invest in print advertising this year, reflecting the trend seen during 2020.

ACTIVITIES

When asked if they were considering other marketing or support activities to specifically aid their recovery within their destination, we found three significant areas of planned activity;



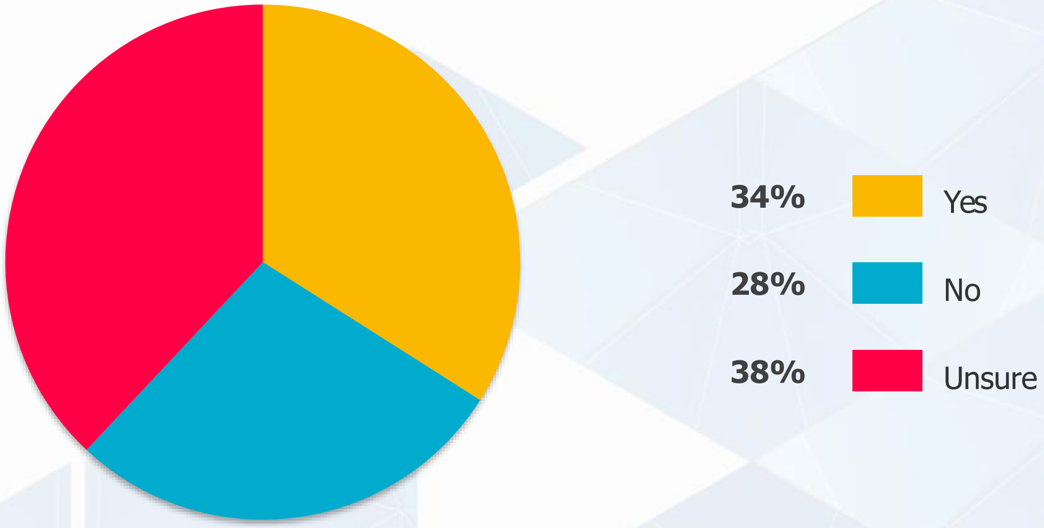
The fact that just over half of destination see an improved Ambassador programme as a way to build business, is perhaps testament to those that have seen significant success in programmes such as these prior to the pandemic. Ambassador programmes are generally seen as vitally important in attracting association events, whilst being very cost effective to operate.

Its not surprising to see 49% planning integrated campaigns, as these would be necessary to kick start a wider plan of activity while building confidence in the destination. An increase in subvention or other funding of bids reflects our own experience of destinations securing additional support from non-traditional business events funding sources, such as enterprise or investment partners.

All of this would demonstrate that a significant percentage of destinations are anticipating a far higher degree of market competition as the sector begins its global recovery.

FUNDING

When asked if they believed they would receive additional funding to support the recovery across the destination over the next 12 months, specifically in relation to attracting business events, we saw a fairly mixed picture.



34% had either secured additional funding or were expected to do so, versus 28% that had not and did not expect to do so. However, the largest percentage, 38%, were unsure at the time of the survey.

As with the section on current investment, while it is very encouraging to see 34% of destinations securing additional funding, given that 38% are unsure, it may be slightly too soon to portray an accurate picture at this early stage in the recovery cycle, given longer term fiscal planning may still be underway.

From our own evidence and experience of working with a number of business events destinations, we believe there is likely to be additional singular funding, albeit short term, to aid recovery across a majority of destinations. This will be crucial to stimulate demand and encourage a return to live events across all sectors and regions as quickly as possible.

The increase in funding also demonstrates a real understanding from policy makers, of the value and importance of business events to a destination and should therefore be seen as a positive reflection of the work that has been done to do so.

CONCLUSION

The title of this report is 'it's time', which is very fitting when we look at the data captured in the survey. Its obvious that many destinations are now actively looking to the future after a period of forced hibernation, and therefore feel that it is indeed now time to emerge and to positively engage with their various audiences.

While we should all be realistic, and recognise that any post pandemic recovery, at least on a global level, will be gradual and staggered, there is no doubt that there is a need for destinations of all kinds, to take a lead in promoting business events as a way to drive the wider economic and social recovery.

There is also little doubt that as destinations do begin to fully resume their proactive communications activities, it will be within a highly competitive environment, far greater than what we experienced previously, and one in which the structure and subtleties of business events will surely change.

If there is one thing we can be sure of, is that we find ourselves in a very fast moving and dynamic environment. One that will require destinations to be far more agile and open to a change in direction and strategy to ensure they stay relevant to their audiences.

This is also true in terms of the outcomes of this report, as we will almost certainly need to repeat the survey later in the year to ensure our own results continue to be helpful and relevant.

We look forward to doing so, when it's time.

PANEL

We would like to thank all of the destinations who contributed to this piece of research, and to the IBTM team and the wider business events community for their support in sharing the survey.

We would particularly like to thank our Advisory Panel, for their support, advice and invaluable contributions in the completion and launch of this report.

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ABOUT

This report was created and published in partnership between davies tanner and IBTM Events, part of Reed Travel Exhibitions. It has been produced to provide destinations with an insight into marketing and communications practices during the coronavirus pandemic, and also through recovery.

The report is provided as a free download.

davies tanner is the leading PR and brand communications agency for the global business events sector, providing a range of media, marketing, advocacy and consultancy services to support destinations, venues, hotels, trade shows and associations, helping brands navigate their way from recovery to revival.

daviestanner.com

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