



Conference Centre Survey Report

Prepared for

KPMG

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1. BACKGROUND

The following represents the results of a survey of 150 randomly selected associations from across Canada.

The purpose of the project was to gather information from these organizations on their current and future needs related holding conferences and the use of conference facilities.

The surveys were conducted from November 9th to November 14th 2001.

2. METHODOLOGY & LOGISTICS

Study Sample / Survey Method

- A total of 150 organizations were randomly selected and surveyed from the 1998/99 Directory of Associations in Canada database.
- The person or one of the persons at the organization responsible for planning and booking conference facilities was interviewed.

Logistics

- The surveys were conducted between the days of November 9th to November 14th 2001. A total of 30% of all interviews were monitored and the management of Oraclepoll Research supervised 100%.
- Interviews were conducted during normal business hours (8:30 a.m. to 6:00 p.m.) on a daily basis. If the respondent was busy at the time of the initial call or not available, telephone appointments were established to conduct the interview at a time convenient to the respondent. In addition, fax or electronic surveys were sent to respondents if requested.
- In addition, there were up to 5 attempts to contact respondents (on a rotating daily basis). If Oraclepoll Research was unable to contact the respondent after 5 attempts the number was “discarded”.

Reporting Notes

- The results contained in this report are in aggregate format and protect the identity of individual respondents.
- It should also be noted that not all respondents were asked all questions due to screening and certain questions not being applicable to certain respondents.
- The results from some questions may not add up to 100% due to rounding.

3. EXECUTIVE SUMMARY

Usage

Almost three-quarters (66%) of organizations surveyed hold conferences annually, while 20% have them bi-annually. A total of 7% have such events more than four times a year, 4% three times a year and 1% infrequently.

The favored times of year to hold conferences is in the late spring, early summer months of May (17%) and June (17%) as well as the late summer, early fall months of August (10%) and September (13%). The lowest usage was in the winter months of December (1%), January (2%) and February (4%).

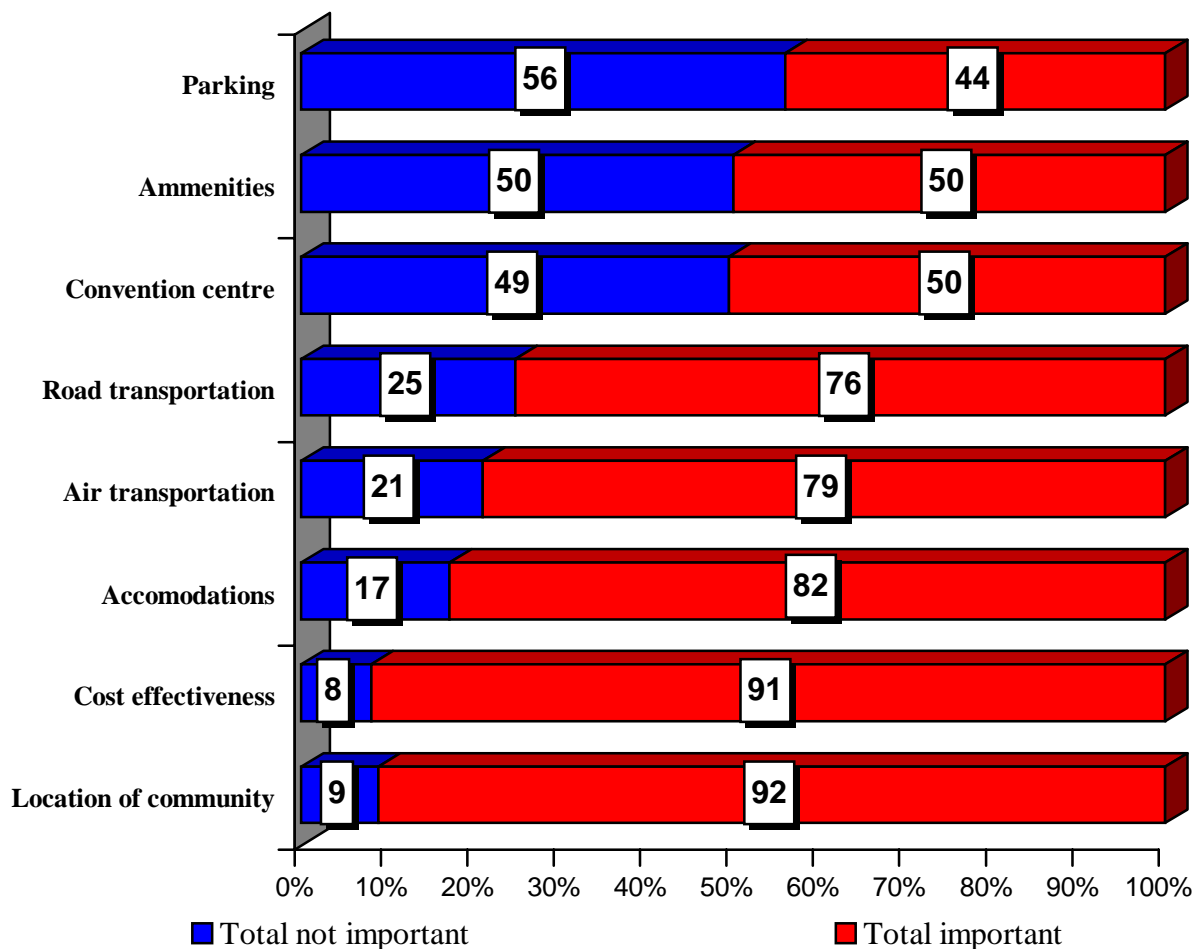
Location Considerations – Unaided

When asked in an open format question what the most important considerations are that their organization takes into consideration when selecting a site or location to hold a convention, the most cited comments related to location (22%), cost (21%), space for the conference (11%) and the accessibility of travel (10%).

In total, 39% of grouped comments related to issues such as location, accessibility and convenience, while 32% were associated with the need for amenities such as space, accommodations, facilities, activities and post secondary institutions.

Location Considerations – Aided

I am now going to read a list of considerations that your organization may take into account when selecting a conference location. After each one is read, please rate its importance to your organization...

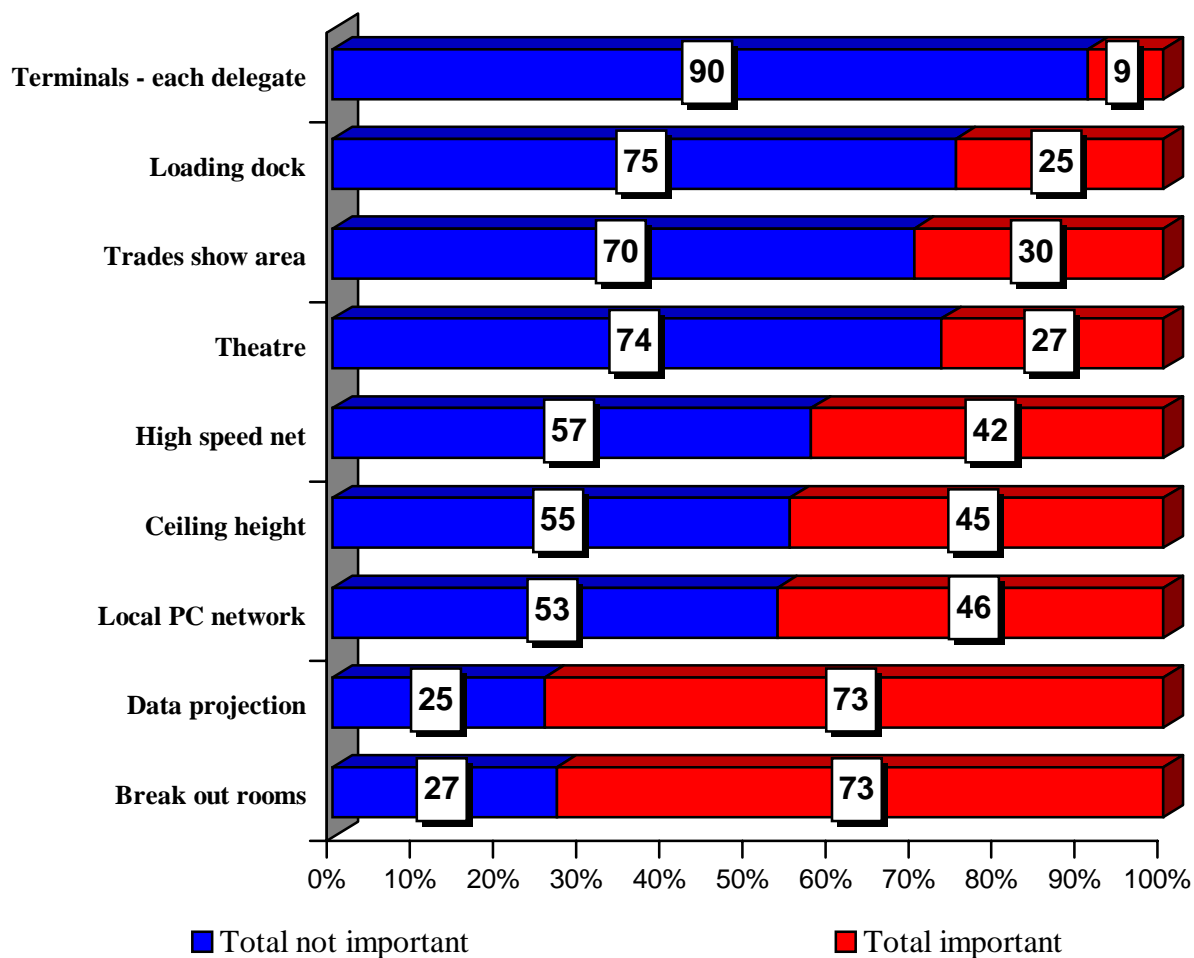


Location of the community and cost were the most important considerations to associations surveyed. A high level of importance was also attached to having accommodations, access to air and road transportation.

Least important were parking, amenities in the community and having a dedicated convention centre.

Convention Facility Requirements – Aided

Next, I am now going to read a short list of specific requirements that your organization may have with respect to a convention facility.. After each one is read, please rate its importance to your organization...



The highest level of importance was placed on having breakout rooms and data projection capabilities at a conference centre.

Location Choices

Preferred conference locations included the cities of Toronto (17%), Vancouver (11%), Montreal (8%), Halifax (7%), Calgary (6%), Ottawa (6%) and Quebec City (5%).

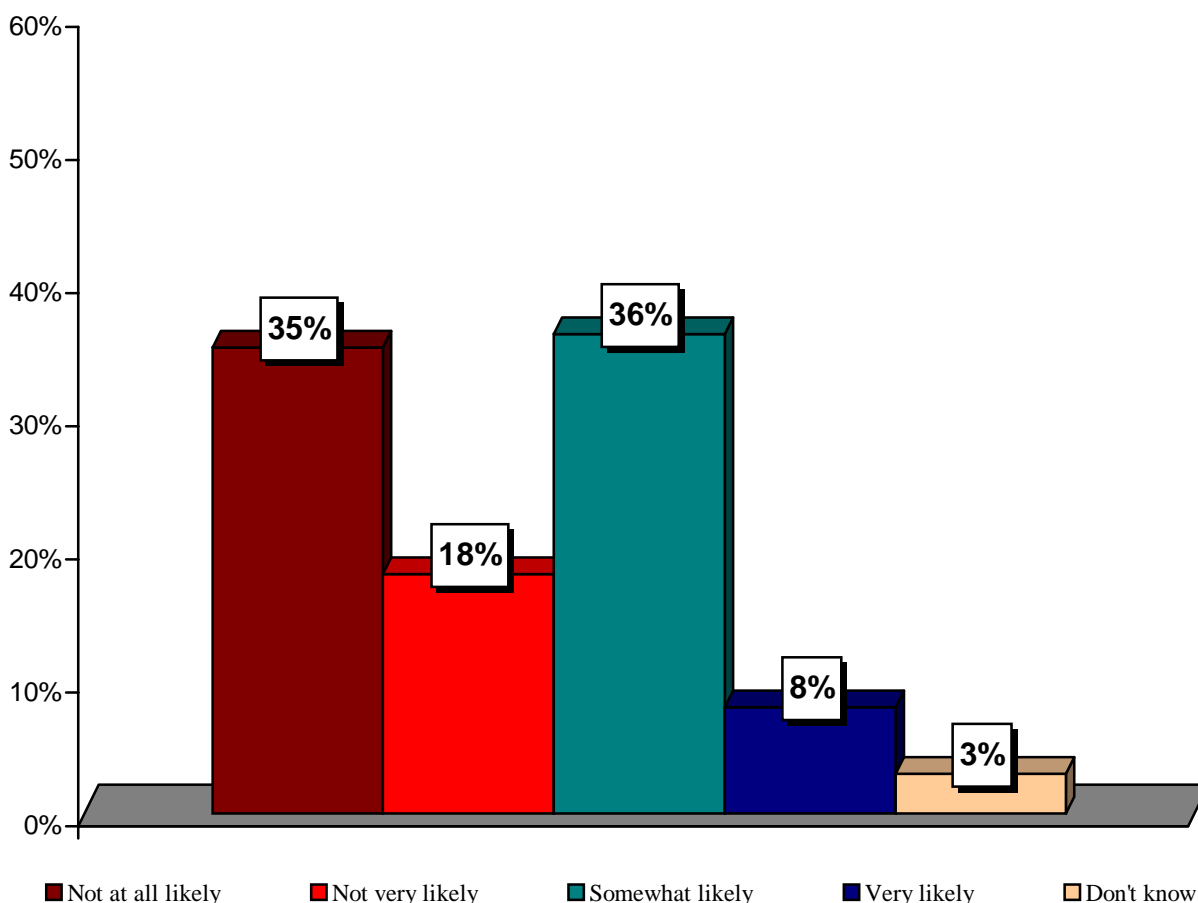
Less than half (46%) of organizations surveyed issued requests for proposal for conference locations and most award contracts on an individual basis (77%) as opposed to in blocks of time (14%).

While 29% of associations have no policy with respect to the length of time it takes them to return to a conference location after a visit, 19% of them take one to two years to return, 13% three to four years, 17% five to six years and 13% more than five years. Only 1% would return within the same year.

Only 3% of associations surveyed had at one time held a conference in Sudbury but all were very satisfied with their experience and were very likely to return.

Location Choices

If the City of Sudbury were to have a new convention centre that included the amenities and resources that are important to your organization, what is the likelihood that you {your organization} would consider Sudbury as a host site? Would you be very likely, somewhat likely, not very likely or not at all likely to consider it?



A total of 44% of associations claimed that they would be either very likely (8%) or somewhat likely (36%) to consider Sudbury as a host site for their convention if the community were to have a new convention centre that included the amenities and resources important to them. On the other hand 53% would not consider Sudbury and 3% did not know.

Reasons for likely considering Sudbury related to trying different places (6%) and having things to do there (3%), while barriers reflected distance / too far (17%), having no members in the area (9%), the location (9%) and not being familiar with the area (7%).

Having a cost advantage (11%) and accessible air travel (11%) would most encourage organizations to choose Sudbury as a convention location, while 6% cited quality accommodations and 6% convention centre amenities.

A total of 27% did not know, 10% claimed nothing would encourage them to choose the community and 8% stated having more members.

Summary

A significant number of associations interviewed claimed that they would be somewhat likely consider holding a convention in Sudbury if the community if the community were to have a new convention centre that that included the amenities and resources important to them. This despite concerns over its location and the perception of inaccessibility by air and road.

The most significant barriers to attracting conventions to North Bay, is the perception among businesses that the community is remote and far away from them.

Location and accessibility issues are of great importance to the organizations interviewed, playing a large role in their decision to choose a site.

Having a dedicated convention centre itself was less important than the amenities than attributes such as breakout rooms, data projection capabilities and other issues such as the quality of accommodations. The cost effectiveness of a location was also important.

Other barriers related to attracting new organizations to Sudbury related to not holding conferences out of their home province and the fact that Sudbury does not have members of their association.

4. RESULTS BY QUESTION

Q1. Does your organization hold conventions {conferences}?

Yes	Go to Q2
No	Terminate

Q2. How frequently does your organization hold conventions?

Not annually / infrequent	1%
Annual	66%
2 times a year	20%
3 times a year	4%
4 times a year & more	7%

Q3. What month(s) do you usually hold conferences?

Accept Multiple Responses

January	2%
February	4%
March	5%
April	7%
May	14%
June	17%
July	9%
August	10%
September	13%
October	9%
November	6%
December	1%
Don't know	2%
Varies	1%

Q4. Thinking back over the past three years, in what communities has your organization held conventions?

Accept Multiple Responses

Banff	<1%
Brandon	<1%
Burnaby	<1%
Calgary	6%
Charlottetown	2%
Chilliwack	<1%
Coquitlam	1%
Cornerbrook	<1%
Don't know	<1%
Dorchester	<1%
Edmonton	3%
Fredericton	<1%
Halifax	7%
Hamilton	<1%
Huntsville	1%
Kamloops	<1%
Kelowna	1%
Kimberly	<1%
Kingston	<1%
Langley	<1%
London	1%
Mississauga	<1%
Montreal	8%
Niagara Falls	<1%
Niagara on Lake	<1%
North Bay	<1%
Orillia	<1%
Ottawa	6%
Parksville	<1%
Peterborough	1%
Port Moody	<1%
Quebec City	5%
Richmond	1%
Saskatoon	<1%
St Johns	1%
St. Johns	<1%
Sudbury	<1%
Summerside	<1%
Toronto	17%
Trois River	<1%
Vancouver	11%
Victoria	3%
Waterloo	<1%
Whistler	3%
Windsor	<1%
Winnipeg	4%

Q5. Does your organization issue request for proposals to potential hosts?

Yes	46%
No	49%
Don't know	6%

Q6. Are they conference locations awarded in blocks of time or are they awarded on a separate individual basis?

Blocks	14%
Individual	77%
No policy	4%
Don't know	4%

Q7. After having a convention at a location, how long does it take for your organization to return to that community?

Under 1 year	1%
1-2 years	19%
3-4 years	13%
5-6 years	17%
More than 6 years	13%
No policy	29%
Don't know	9%

Q8. On average, how many people attend your conferences?

1-100	39%
101-200	16%
201-300	11%
310-400	6%
401-500	7%
More than 500	17%
Don't know	4%

Q9. And how many hotel rooms does your organization require?

1-50	39%
51-100	6%
101-150	13%
151-200	3%
201-250	4%
More than 250	16%
Don't know	20%

Q10. When selecting a site or location to hold a convention, what are the three most important considerations that your organization takes into consideration?

Location	22%
Cost	21%
Space for conference, tradeshow and seminars	11%
Accessibility / travel / transportation	10%
Accommodations	6%
Facilities	6%
Airport accessibility	4%
Activities in the city	4%
Convenience	3%
Amenities	3%
Quality / reputation	3%
Service	2%
University	2%
Good food / menu	1%
Availability	<1%
Central location	<1%
Don't know	<1%
Flexibility	<1%
Access to hospital	<1%

I am now going to read a short list of considerations that your organization may take into account when selecting a conference location. After each one is read, please rate its importance to your organization using the scale of not at all important, not very important, somewhat important or very important.

Q11. Location of the community / proximity

Not at all important	3%
Not very important	6%
Somewhat important	12%
Very important	80%

Q12. Cost effectiveness

Not at all important	1%
Not very important	7%
Somewhat important	29%
Very important	62%

Q13. Air transportation / air links to the community

Not at all important	7%
Not very important	14%
Somewhat important	22%
Very important	57%

Q14. Road transportation / ability to arrive there by road

Not at all important	3%
Not very important	22%
Somewhat important	35%
Very important	41%

Q15. Availability of a convention centre

Not at all important	23%
Not very important	26%
Somewhat important	7%
Very important	43%

Q16. Accommodations in the community

Not at all important	4%
Not very important	13%
Somewhat important	20%
Very important	62%

Q17. Amenities in the community such as arts, culture and entertainment

Not at all important	22%
Not very important	28%
Somewhat important	34%
Very important	16%

Q18. Parking

Not at all important	22%
Not very important	34%
Somewhat important	25%
Very important	19%

Next, I am now going to read a short list of specific requirements that your organization may have with respect to a convention facility. After each one is read, please rate its importance to your organization using the scale of not at all important, not very important, somewhat important or very important.

Q19. Theatre area

Not at all important	49%
Not very important	25%
Somewhat important	18%
Very important	9%

Q20. Break out rooms

Not at all important	15%
Not very important	12%
Somewhat important	27%
Very important	46%

Q21. Loading dock area

Not at all important	51%
Not very important	24%
Somewhat important	7%
Very important	18%

Q22. High speed Internet

Not at all important	30%
Not very important	27%
Somewhat important	21%
Very important	21%
Don't know	1%

Q23. Local computer network

Not at all important	25%
Not very important	28%
Somewhat important	24%
Very important	22%

Q24. Terminals for each delegate

Not at all important	66%
Not very important	24%
Somewhat important	6%
Very important	3%
Don't know	1%

Q25. Data projection capability

Not at all important	9%
Not very important	16%
Somewhat important	28%
Very important	45%
Don't know	1%

Q26. Ceiling height

Not at all important	22%
Not very important	33%
Somewhat important	27%
Very important	18%

Q27. Trades show area

Not at all important	44%	Go to 29
Not very important	26%	Go to 29
Somewhat important	9%	Go to 28
Very important	21%	Go to 28

Q28. How many square feet are required for the trades show area?

Under 5,000	16%
5,000 – 9,999	5%
10,000 – 20,000	11%
More than 20,000	16%
Varies	10%
Don't know	42%

Q30. Has your organization ever held a conference in Sudbury, Ontario?

Yes	3%	Go to 31
No	97%	Go to 34

Q31. Using the scale where one is very dissatisfied and five is very satisfied how would you rate your overall satisfaction with this experience?

Very dissatisfied	-
Somewhat dissatisfied	-
Neutral	-
Somewhat satisfied	-
Very Satisfied	100%

Q32. What is the likelihood that you would recommend to someone close to you (for example: a friend, family member, business acquaintance) Sudbury as a place to hold a convention? Would you be very likely, somewhat likely, not very likely or not at all likely to recommend the city?

Very Likely	100%
Somewhat Likely	-
Not very likely	-
Not likely at all	-
Don't know	-

Q33. If the City of Sudbury were to have a new convention centre that that included the amenities and resources that are important to your organization, what is the likelihood that you {your organization} would consider Sudbury as a host site? Would you be very likely, somewhat likely, not very likely or not at all likely to consider it?

Very Likely	8%
Somewhat Likely	36%
Not very likely	18%
Not likely at all	35%
Don't know	3%

Q34. Can you tell why you feel this way?

ACCEPT 3 UNAIDED RESPONSES – KEEP EACH TO 10 WORDS OR LESS

No-Too far	17%
No-No members there	9%
No-Major cities preferred	9%
No-Because of location	9%
No-Never been / not familiar with	7%
Yes-Try different places	6%
No-Air transportation links	6%
No-Nothing to do	4%
No-No conventions in Ontario	4%
No-Not specializing in our industry	4%
No-No education amenities (specific)	3%
Don't know	3%
No-Accommodations	3%
Yes-There are things to do	3%
Yes-It is a possibility	3%
No-There are no facilities	3%
No-Not well known as a conference center	1%
Yes-It has post secondary amenities	1%
Yes-Major cities are preferred	1%
Yes-Because of location	1%
No-Cost	1%
Yes-Have members there	1%
Yes-Have in the past	1%

Q35. What would most encourage your organization too choose the community of Sudbury as a convention location?

Don't know	27%
Cost advantage	11%
Accessibility of air travel	11%
Nothing	10%
More members in the Sudbury area	8%
Quality accommodations	6%
Convention centre facility amenities	6%
Amenities	5%
Nothing -Would not consider going out of the province	3%
If they meet all our needs	3%
If it has something others do not have / advantage	3%
If invited / asked by members	2%
Track record	2%
Central location	2%
Rotation	1%