Tourism Australia has completed new international research examining the “path to purchase” behaviour of potential international association conference delegates. This research helps us better understand the core decision-making behaviour of potential delegates and the best ways in which to reach and convince them to travel to international association events held in Australia.

These research findings will assist Australian industry in delivering effective marketing activity – the right message via the right channels and at the right time – to ultimately deliver higher delegate numbers to association conferences held in Australia.

KEY INSIGHTS FOR INDUSTRY

A balance of professional outcomes and strong destination appeal provide the ideal combination for delegates choosing which conference to attend. Overall, Australia is highly regarded and appealing to delegates. Ensuring delegates have access to high quality, informative content on Australia on conference websites can greatly enhance the decision to travel and should be a key consideration for these sites.

Conference delegates are looking to be inspired to travel, and they consider the conference website the key source for this information. The site should highlight key program elements that deliver business outcomes - networking and development opportunities, well-known speakers and updates on delegates attending are all highly regarded.

The majority of delegates must build a case to gain approval to travel to a conference, and the ability to quickly gather information on the return on investment of attending can be very helpful in putting this case together. Early-bird and special pricing or value-add offers can also help build a strong economic case for registration and travel.

The ability to extend the stay beyond the conference is also valued, with delegates wanting to learn about the destination, and what there is to see and do post-conference.

To ensure delegates are given information, inspiration and motivation to book throughout the decision-making process, a well-timed communications plan that anchors to the conference site should be a priority for any conference marketing activity.
KEY MOTIVATORS OF ATTENDANCE AT AN INTERNATIONAL ASSOCIATION CONFERENCE

• There is a range of motivations for choosing to attend an international conference, but the majority of delegates seek a balance between destination appeal and conference content.

• Potential delegates attend conferences to learn, to network or both. They evaluate conferences on both content and on other attendees with whom they can interact.

• The conference program, papers being presented, keynote speakers and whether respected peers are attending all influence their decision. Without a strong conference program, the majority of delegates will not consider attendance.

• Destination appeal is judged on a broad range of factors, including the ability to extend the trip beyond the conference and having a range of activities to experience including, food and wine, history, culture and iconic attractions.

• For most respondents, the ideal association conference combines work and leisure. Striking a balance between opportunities to connect with peers and to discover the destination is the optimal scenario.

WHAT MAKES THE PERFECT CONFERENCE EXPERIENCE?

• Conferences which successfully manage to integrate the program of events with the destination are the most appealing.

• In fact, the strongest positive memories from previously attended conferences tended to extend beyond the conference itself.

• The experience commences with the conference website which must provide information on delegates attending, key speakers, networking opportunities and program content.

• The conference website must be visually appealing and offer a ‘one-stop shop’ for delegates to plan their trip. This includes destination information, accommodation, public transport, and attractions.

• Offering a social program that includes networking events in scenic or iconic settings, choosing event venues that make leisure activities such as shopping, dining and sightseeing convenient, and providing opportunities to discover the destination are all highly appealing to delegates.

• A lot of time is invested in evaluating conferences, and communicating staggered, early bird packages that offer special pricing and clear deadlines work hard to drive visitation. These should be a consideration for any conference.

CONFERENCE ESSENTIALS

There are key components of a conference that delegates consider essential to attendance.

1. Quality program content 72%
2. That you can extend the trip into a holiday 61%
3. A desirable destination 60%
4. Opportunities for professional networking 59%
5. Colleagues/Peers you know are attending 56%
6. Lots of activities at the destination 56%
7. Discounted accommodation around the conference 55%
8. Being able to take family / friends with you 54%
9. Contribution to professional accreditation 53%
10. People have recommended the conference 53%
11. Well-known speakers 49%
12. High-profile delegates 48%
Making a case to travel

• Most delegates need to gain formal business approval from their employer to attend and rely on the strength of conference content to make their case. The research showed that nearly 80% of delegates have a percentage of costs paid by their employers (employers pay for majority or all of costs for 61% delegates).

• Over 60% of respondents were travelling at their employer’s expense and required a strong business case in order to gain approval, making the content of the conference of particular importance.

• 20% of respondents pay for most or all of the costs related to travel, with this group comprising very senior professionals or business owners. The remaining 20% represented those for whom the cost of the conference was split between their employer and themselves.

KEY BARRIERS TO ATTENDING AN INTERNATIONAL ASSOCIATION EVENT

• Logistics around the event are the main barriers to attending conferences, including factors such as time away from work and home, and the cost of travel.

• Employers not approving travel due to either budget constraints or other business reasons were cited as the main reasons for not attending association conferences.

• While travel time, including time away from home, was claimed as a barrier for over 25% of respondents, 45% said they would travel more than 10 hours to attend an association event.

• Destinations with clear challenges such as poor safety, political unrest, poor accessibility and/or transport links, health risks and extreme weather quickly dropped out of consideration, regardless of the appeal of the conference program.

• Delegates who considered an event in Australia but did not travel due to not getting approval were disappointed not to get there. When gathering information about Australia they found it a highly appealing destination and often lobbied hard to be able to receive approval from decision makers to travel.

• The process of consideration and discovery has convinced them of the appeal of Australia and as a result, many are determined to attend an association conference in Australia in future.
THE DECISION MAKING PROCESS

The conference decision making process is fairly complex, and involves multiple steps and stages, with both personal and professional aspects taking a considerable amount of time to weigh up.

BOOKING VS CONSIDERATION

The consideration and assessment period can be lengthy and potential delegates want to gather information over a long period of time. Bookings are undertaken closer to the date of the event.

<table>
<thead>
<tr>
<th>When do the majority of delegates book their conference attendance?</th>
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<tbody>
<tr>
<td>12 months before</td>
<td>0%</td>
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<tr>
<td>6-12 months before</td>
<td>7%</td>
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<tr>
<td>4-5 months before</td>
<td>17%</td>
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<tr>
<td>1-3 months before</td>
<td>73%</td>
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<tr>
<td>The same week</td>
<td>3%</td>
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TRIGGER
Potential delegates receive information about conference...

Conference announcement (early bird cut-off date is diarised).

PASSIVE CONSIDERATION
Especially if there is a long lead time...
3-6 months prior to early-bird cut-off date.

CONCEIVABILITY
Review of conference content, speakers and attendees, as well as leisure elements...
2-3 months prior to early bird cut-off dates.

CONVERSATIONS
Discussion with potential attendees and colleagues on value of conference - intention to attend builds...
2-3 months prior to early bird cut-off dates.

APPROVAL
Formal application to gain approval for travel - based on a strong business case
Sought 4-6 weeks from early bird cut-off or from when delegate wishes to register.

DETAILED CONSIDERATION
Specifics of trip are evaluated (timing, flights, cost), intent to travel is confirmed or not
6-8 weeks from early bird cut-off OR 2 weeks prior to lodging request to attend conference.

BOOKING
All aspects of the conference are reserved (registration, flights, accommodation etc.).
Strong trend to book just before early bird cut-off (73% book within 3 months of travel). Very little evidence of any delay between approval and booking.

FINE TUNING
Detailed program / meeting planning, leisure activities organised and booked.
THE CONFERENCE WEBSITE – KEY TO SUCCESSFULLY ATTRACTING DELEGATES

- Almost exclusively, the conference website is the key information source used throughout the decision making process.
- It is consulted in detail and is the first place visited. Except for flight and accommodation websites, other information sources are rarely consulted.
- The expectation that the conference website will provide all the information required by the delegate is often not met, with many respondents feeling conference websites currently fail to deliver.
- Respondents felt the websites focused on the conference program but provided little or no information about the destination, and why the delegate should choose to attend the event there.
- Links to further information sources on the destination were also felt to be lacking and were highly desirable.
- As a resource that is consulted at several points in the decision making process, website content should inspire, inform and facilitate the decision to attend.

PERCEPTIONS OF AUSTRALIA AS A CONFERENCE DESTINATION

Australia competes strongly on the world stage in most areas, ranking #1 on scenery, sight-seeing, being a destination worth travelling to and being an exciting destination for conferences.

- Destination appeal is judged on a wide range of factors, including leisure options, the weather, food & drink, activities, history, culture and iconic attractions.
- Australia offers high appeal to international delegates, with many choosing to extend their stay and bring partners and family members with them to experience the destination.
- Australian conferences compared favourably with other destinations, with a rating of 8.3 out of 10 versus the global average of 8.1.
- 22% of respondents rated Australian conferences 10 out of 10 versus the 16% global average.
- 93% of respondents said they would probably or definitely consider attending a conference held in Australia compared to one a similar distance away.
- Australia is viewed as having some highly developed areas of expertise, including in healthcare sciences, influencing attendance to these conferences when held in Australia.
- This is offset by a perception that Australia does not produce or attract world-class business leaders – which can lead to conferences held in Australia being considered as less international in their content and attendees.

Australia as a destination has a lot to offer: it breeds excitement, has great sight-seeing options and scenery, it is seen as worth travelling to, and comes second only to Europe in having world-class food and wine.
THE RESEARCH
Snapcracker, a specialist market and social research agency, undertook a two-stage methodology, completed in early 2016. Respondents were comprehensively pre-qualified mid-senior level professionals, likely to travel internationally to attend an association conference.

Stage One: 41 in-depth interviews with previous and potential association conference delegates with decision-making responsibility [UK (14), USA (14), Asia (13)].

Stage Two: 611 short online surveys with previous association conference delegates [(UK (124), USA (144), India (144), Singapore (98), China / Hong Kong (101)].

The research covered a broad range of industries and professions, representative of much of Australia’s association conference business. It included medical professions, healthcare, finance, education, IT and engineering, including oil and gas.