



Business Events Research

Delegate Spend and Trip Extensions
VisitBritain

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1. Executive Summary

What is this research for?

This research measures:

- Delegate spend at business events taking place in Britain
- Behaviour of delegates extending trips for leisure

We have conducted 2,200 interviews at 84 business events across Britain between March and November 2017. For incentive trips we have gathered spend data by telephone and online through DMCs and incentive agencies covering 38 trips and 5,263 delegates.

Average spend by event type and delegate origin

Event type	Av. spend per delegate
Association conference – international	£1,021
Corporate conference or meeting – international	£856
Association conference – domestic	£448
Exhibition / trade fair – international	£352
Corporate conference or meeting – domestic	£299
Exhibition / trade fair – domestic	£203
Overall	£613

International events attract much higher average spend than their domestic equivalents. The two main reasons are:

- Overseas delegates stay much longer on average (3.7 nights) than domestic delegates (1.0 nights)
- International events charge much higher registration fees

Consequently overseas delegates spend considerably more than domestic delegates, and this also increases in relation to distance from the UK. Delegates from outside Europe spend £1,748 on average. This compares to £990 for overseas delegates from within Europe, and £329 for UK delegates. Please refer to Section 3 for further details.

Average delegate spend for incentive trips is far higher

For incentive trips, the average spend per delegate is £1,893. It is highest for trips from North America (£2,311), the main reason being the higher av. length of stay (4.9 nights) compared to other markets.

Average spend varies by region of Britain: London (£2,332), Scotland (£1,518), rest of England (£1,118).

Extension doubles spend

Delegates who extend their trip for leisure spend £1,942 on average. Without the extension, the same delegates would have spent £991 (av).

Likelihood of extending correlates with distance from UK	One third (33%) of delegates from outside Europe extend their trip for leisure. This compares to 12% of overseas delegates from within Europe and 2% of UK delegates.
Event decided first; extension second	Typically a delegate will decide to attend an event based on whether it makes business and practical sense to attend. That decision is not normally influenced by thoughts of extending the trip.
But extension is decided on very soon after	Soon after deciding to attend the event, delegates need to sort their travel and accommodation – especially flights (if applicable). On booking flights, they need to have decided whether they are extending.
You see places you would not go to otherwise	One of the main drivers for extending is that delegates get to see places they may well otherwise not visit for holidays. This is a key reason why extending correlates strongly with distance from the event location.
Practicalities matter more than destination appeal	<p>The practicalities of flight timings, getting around and accommodation are more influential on the decision to extend than the destination appeal. Many extenders are not terribly fussed whether the destination is iconic or not. The mere act of exploring a new place is enjoyable.</p> <p>The quantitative findings support this: likelihood of extending does not vary significantly by region of Britain where the delegate attended the event.</p>
Spending time away from work is a major factor	Work / busyness is the main reason for not extending the trip, and it also holds back those who do extend from doing it more often. Destination appeal (or lack of) plays little part in the decision.
Family and friends	If a delegate has family or friends in or near the event city, this is a significant motivation to extend.
Time of year	Time of year is not a highly important factor in <i>whether</i> a trip is extended. It can affect <i>where</i> a trip is extended. Over a third (36%) of summer extenders spend at least some of their extra nights elsewhere in Britain; this compares to 18% of spring & autumn extenders. Some depth interviewees say that wintry months keep them in the city.
Not much 'hand-holding' needed	Extenders are mostly well travelled and seem quite happy to 'sort themselves out'. As such, they tend to leave the finer details of extension planning late because they have the confidence to do so.
High likelihood of returning	About a third (35%) of all delegates say they are 'very likely' to return to the area for a holiday or short break, and a quarter (25%) say they are 'fairly likely'.

2. How and Why has this Research been Conducted?

Understanding the business events sector

This research was commissioned by VisitBritain / VisitEngland, with funding coming from two separate government initiatives:

- The £40million Discover England Fund, which is supporting a programme of research to ensure that funding is awarded to bids that are in line with consumer and business trends
- The government's GREAT initiative, which funded the inclusion of a wider UK profile

Detailed research in the sector was required to inform strategy, focussing on three areas in particular:

- (1) Delegate spend
- (2) Destination decision-making, motivations and barriers
- (3) Understanding trip extenders

This report is for Modules 1 & 3 above – Delegate spend and Trip extenders. The Module 2 findings were published earlier in 2017:

<https://www.visitbritain.org/business-events-research>

Face-to-face interviews at events

The main method used to conduct this research was face-to-face interviews with delegates at business events.

We have conducted 2,200 interviews at 84 events across Britain between March and November 2017. The events vary by type, size, duration and location. The focus is on international events (79% of events) to fit with VisitBritain's wider remit of attracting international visitors to Britain.

Type of event	No. of events	No. of interviews
Corporate conference / meeting – domestic	5	159
Corporate conference / meeting – international	18	340
Association convention – domestic	6	181
Association convention – international	24	592
Exhibition / trade fair – domestic	6	165
Exhibition / trade fair – international	24	753
Training – domestic	1	10
Total	84	2,200

Location of events

The breakdown of events and interviews around Britain is shown below. This broadly reflects the key towns and cities in the industry, while ensuring adequate sample sizes of interviews in and outside of London, and in England, Scotland and Wales.

Town / city	No. of events	No. of interviews	% of interviews
London	24	622	28%
Birmingham	11	320	15%
Glasgow	6	179	8%
Manchester	4	142	6%
Cardiff	5	128	6%
Bristol	3	101	5%
Newcastle	5	100	5%
Harrogate	4	98	4%
Edinburgh	3	91	4%
Liverpool	4	58	3%
Brighton	1	53	2%
Aberdeen	1	39	2%
Sheffield	2	37	2%
Bournemouth	1	34	2%
Oxford	2	31	1%
Newport	1	31	1%
Exeter	1	28	1%
Southampton	1	28	1%
Nottingham	1	25	1%
Coventry	1	24	1%
Cambridge	2	22	1%
Luton	1	9	<1%
Total	84	2,200	100%

Incentive trips

Incentive trips are a very different type of business event, and the delegates themselves would not know how much has been spent on them. We have gathered spend data by telephone and online through DMCs and incentive agencies covering 38 trips and 5,263 delegates.

**Depth interviews
with extenders**

For trip extensions we have supplemented the quantitative findings from the main face-to-face survey by conducting 24 follow-up depth interviews with extenders by telephone.

All percentages, numbers, charts and tables throughout the results sections of this report come from the quantitative surveys. We have used the qualitative findings to explain the numerical findings on extenders through interpretative commentary and verbatims.

3. Delegate Spend – Conferences and Exhibitions

- 3.1 In this Section we discuss the average delegate spend at conferences and exhibitions by different types of delegate, event and region of Britain. This is based on the 2,200 face-to-face interviews at 84 events.
- 3.2 The method used for incentive trip spend is different and so we discuss this in Section 4.
- 3.3 We have asked delegates to estimate their trip spend by different categories for ease of recall. Where they knew they had spent / would spend *nothing* in a category, interviewers have recorded this as a zero and this counts towards the average.
- 3.4 Where they knew they had spent / would spend *something* in a category but could not give a reasonable estimate, this has been left blank and is not included in the averages. Examples of this include the company paying certain elements without the delegate knowing the amount.
- 3.5 Some delegates have given us a package spend figure. In these cases we have asked what this includes and have gathered any additional spend not covered by the package.
- 3.6 All spend on travel from home to the event (e.g. air fares) is excluded.
- 3.7 Some delegates have extended their trip for leisure. The spend relating to the extension is included in the average spend figures. When discussing trip extenders in para. 3.17 we show the value of the extension separated out from total spend.

Average spend by category

Spend category	Av. spend per delegate	International delegates	Domestic delegates
Registration fee	£254	£449	£160
Accommodation	£181	£442	£73
Food & drink	£67	£135	£35
Shopping	£46	£124	£12
Local travel (ex. travel from home)	£24	£43	£15
Evening events / entertainment	£15	£32	£7
Sightseeing & tours	£6	£19	£1
Anything else	£4	£10	£1
Overall	£613	£1,265	£329

N.B. The overall average spend figure is not the sum of the parts because it also incorporates the interviews where package spend has been given

Average spend by event type

Event type	Overall	Intern'tl events	Domestic events	Spend per day (day delegates)	Spend per night (overnight delegates)
Association conference	£917	£1,021	£448	£342	£332
Corporate conference or meeting	£691	£856	£299	£302	£315
Exhibition / trade fair	£340	£352	£203	£103	£319
Overall	£613	£689	£330	£169	£322

We use the term 'domestic' for events which clearly have a UK delegate focus, although some may also attract a small proportion of delegates from overseas. We use the term 'international' for events which have a more open international appeal and attract a significant proportion of delegates from overseas (estimated to be at least 20%).

International events attract much higher average spend in all major categories

- 3.8 International corporate and association events attract more than twice the average delegate spend than their domestic equivalents. The much higher average spend is found in all major categories of registration fees, accommodation, food & drink and shopping.
- 3.9 Overseas delegates stay much longer on average (3.7 nights) than domestic delegates (1.0 nights) and so this would mostly explain the much higher spend on accommodation, food & drink and shopping.
- 3.10 International events tend to run for longer than domestic events and arguably have a higher profile with their international appeal. This may explain the much higher registration fees charged: £446 average for international corporate and association conferences compared to £145 for the equivalent domestic events. International trade fairs charge £107 on average, compared to £25 for domestic trade fairs (many of which are free).

Average spend by region of Britain

Region of Britain that the event takes place in	Av. spend per delegate	Spend per day (day delegates)	Spend per night (overnight delegates)
London	£646	£191	£430
England outside London	£462	£120	£239
Scotland	£1,128	£378	£396
Wales	£517	£164	£270
Overall	£613	£169	£322

Considerably higher average spend in Scotland

- 3.11 Delegates attending events in Scotland spend about twice as much as delegates in the rest of Britain.
- 3.12 All of the events we have interviewed at in Scotland are international, but even when this factor is isolated, the average delegate spend in Scotland is still about twice as high.
- 3.13 The most significant reason for the vast difference in spend is length of stay. Delegates to international events in Scotland stay 2.8 nights on average, compared to delegates to international events elsewhere in Britain, who stay 1.8 nights on average.
- 3.14 Breaking the data down further, there are two reasons why average length of stay for international events is much higher in Scotland:
- International events in Scotland attract a higher proportion (59%) of delegates from overseas compared to international events in the rest of Britain, where a third (33%) of delegates come from overseas
 - When UK delegates attend international events, they are much more likely to stay overnight in Scotland compared to the rest of Britain. UK delegates to international events in Scotland stay on average 1.7 nights, compared to 0.8 nights for the rest of Britain.
- 3.15 High registration fees charged at some events in Scotland also impact on the average spend.

Average spend by origin of delegate

Origin of delegate	Av. spend per delegate	Spend per day (day delegates)	Spend per night (overnight delegates)
UK	£329	£159	£261
Europe (outside UK)	£990	£267	£331
Outside Europe	£1,748	n/a	£376
Overall	£613	£169	£322

Spend correlates very strongly with distance from the UK

3.16 Delegates from outside Europe spend nearly twice as much on average as overseas delegates from within Europe, who in turn spend three times as much as UK delegates. There are two key reasons for this:

- Delegates from outside Europe are much more likely to extend for leisure – 33% of delegates, compared to 12% for Europe and 2% for UK
- Delegates from outside Europe stay longer even if extension is excluded – 3.4 nights for the event, compared to 2.8 nights for Europeans and 1.0 nights for UK delegates.

Average spend by extender / non-extender

Extender type	Av. spend per delegate	Spend per day (day delegates)	Spend per night (overnight delegates)
Extender for leisure	£1,942	n/a	£323
Non-extender for leisure	£521	£169	£312
Overall	£613	£169	£322

Extension doubles spend

3.17 Delegates who extend their trip for leisure spend £1,942 on average. Without the extension, the same delegates would have spent £991 on average – so extending doubles the spend.

3.18 Even without the extension spend, extenders still spend much more than non-extendors. This is explained mainly by the fact that they are much more likely to come from overseas, especially from outside Europe, which in turn means they:

- Stay longer for the event anyway (even without the extension)
- Pay higher registration fees on average as they are attending international events

4. Delegate Spend – Incentive Trips

- 4.1 In this Section we discuss the average spend per delegate on incentive trips to Britain. This is based on data provided by DMCs and incentive agencies covering 38 trips and 5,263 delegates. The delegates have travelled from the USA (16 trips), Germany (8 trips) and other countries in Europe, Asia and Mexico.
- 4.2 The average spend data discussed below does not include anything that the delegates might spend personally, as attempting to gather this data was seen as too intrusive. In any case, this should not significantly affect the results because agencies say that personal spend on most types of trip is likely to be fairly insignificant compared to that spent by the organiser.
- 4.3 All spend excludes travel to and from Britain, e.g. air fares.

Average spend by origin of delegates

Origin of delegates	Av. spend per delegate	Av. spend per delegate per night
North America	£2,311	£472
Rest of the world	£1,869	£519
Europe	£1,316	£454
Overall	£1,893	£473

Incentive trips have high average spend per delegate

- 4.4 The average spend per delegate on incentive trips to Britain is £1,893. This is far higher than any other type of event covered in the research. Spend does vary considerably by type of client, but 30 of the 38 trips covered have an average spend per delegate of more than £1,000.
- 4.5 Long haul trips have higher average spend than those coming from within Europe. High-spending North America leads with an average of £2,311 per delegate.
- 4.6 These spend differences correlate with average length of stay:
- North America: 4.9 nights
 - Rest of world: 3.6 nights
 - Europe: 2.9 nights

Average spend by region of Britain

Region of trip	Av. spend per delegate	Av. spend per delegate per night
London	£2,332	£542
Scotland	£1,518	£389
Rest of England*	£1,118	£399
Overall	£1,893	£473

**These figures are for the Rest of England. We have not identified any incentive trips taking place in Wales.*

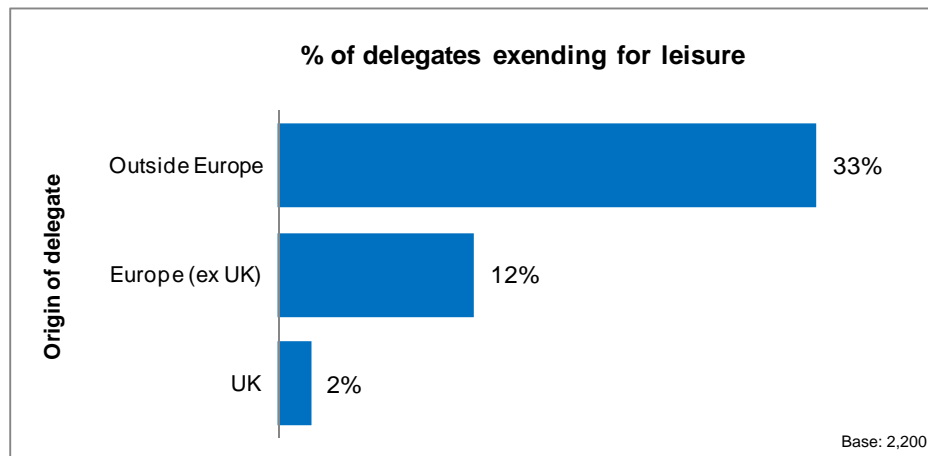
Average spend is highest in London

- 4.7 Incentive trips in London attract an average spend of £2,332 per delegate. The differences in value by region are partly explained by average length of stay:
- London: 4.3 nights
 - Scotland: 3.9 nights
 - Rest of England: 2.8 nights
- 4.8 Another reason is that some key elements of the trip, especially accommodation, are more expensive in London.

5. Extenders

- 5.1 In this Section we discuss the motivation and behaviour of delegates who extend their trip for leisure. These findings are based on:
- The face-to-face interviews conducted at events
 - The qualitative depth follow-up interviews with selected extenders by telephone

How common is extending?



Direct correlation with distance from the UK

- 5.2 There is a very clear correlation between extending the trip for leisure and the distance (in terms of different country / continent) from the UK. From the depth interviews, we understand this is because the further away from home a delegate travels, the less likely they would be to visit the place any other time, which in turn increases the attraction of extending.

"I usually try to add extra days, especially if the conference is in a city or country I would really like to visit or if it is very far away"
 Female, UK, event in Newcastle

"I usually look to extend my stay in any country but the US"
 Male, USA, event in London

Further correlations

- 5.3 The following types of delegate are also more likely to extend for leisure:
- Women (10%) compared to men (6%)
 - Those attending in the summer (12%) compared to spring & autumn (6%)

- 5.4 There are no significant differences by age of delegate, seniority within their organisation or family status.
- 5.5 Interestingly, there are also no significant differences by event region of Britain. This is in spite of other research showing that international awareness and perceptions of London and Scotland are considerably different from most of the rest of Britain (*Module 2 of this research project shows that for example*). <https://www.visitbritain.org/business-events-research>
- 5.6 We discuss the role of destination appeal later in this Section.

When is the decision made to extend?

- 5.7 We have explored this in the depth interviews and discuss the key findings below.

Event decided first; extension second

Typically a delegate will decide to attend an event based on whether it makes business and practical sense to do so. That decision is normally not led or influenced by whether the city or country is an appealing place to extend the trip.

“Deciding on the event came first”
Female, India, event in Newcastle

“I registered for the event first and then decided fairly soon after that I would extend the trip for a week”
Male, Turkey, event in Bristol

But extension is decided on very soon after

Although the decision to extend comes after the decision to attend the event, there is typically a short time between the two decisions. This is largely because having decided to attend the event, extenders need to sort their travel and accommodation – especially flights (if applicable). On booking flights, they need to have decided whether they are extending.

“We [husband and I] decided as we were booking our flights that we would allow extra time for a leisure extension”
Female, India, event in Newcastle

“I registered for the conference in May and made plans to stay at the cottage in Brighton [for extension] at about the same time”
Male, Denmark, event in Oxford

“The decision to attend the conference came first, but the prospect of seeing family was high on my mind when booking the flights”
Male, Canada, event in Edinburgh

What are the key drivers for extending trips?

- 5.8 In the depth interviews we have explored the key drivers behind extending trips for leisure. We discuss each of the key themes in turn below.

You get to see places you would never go to otherwise

Most depth interview respondents frequently extend their trips. One of the main drivers is that they get to see places they may well otherwise not visit for holidays. This is not to say that the places they extend in are unappealing – rather, they would just not be a priority when making holiday plans.

“I usually extend my business trips for leisure – especially in areas I would not go to on holiday, like Nottingham”

Male, Malta, event in Nottingham

This is a key reason why extending trips correlates strongly with distance from the event location.

“I’ve been to conferences in Washington state. But because Washington is close, I wouldn’t extend. Extension is more likely when I’ve had to travel a long distance.”

Male, Canada, event in Edinburgh

For some, this means that they are not terribly bothered whether the destination is iconic or not. The mere act of exploring a new place they would otherwise never see is enjoyable in itself.

“If it is interesting and a half decent place, I like to explore it”

Male, UK, event in Cardiff

Practicalities matter more than destination appeal

Following on from the above point, the practicalities of flight timings, getting around and accommodation are more influential on the decision to extend than the destination appeal.

“Accommodation is an important factor. I like the Premier Inn for instance because it is always clean, has the same standard everywhere. It’s also important that I can rent a car from the airport.”

Male, Ireland, event in London

“Important factors for me are: Can I travel by train? And is there affordable accommodation in the city?”

Female, UK, event in Cardiff

Spending time away from work is a major factor

Perhaps the most significant factor holding back delegates from extending more often and for longer than they already do is the ability to get time off work / spend time away from the office.

“I usually like to extend my business trips for one or two days. The area / city is not so important, but what does matter is whether I’m covered at work.”

Male, Ireland, event in London

“It really depends on whether I have time to extend”

Male, USA, event in Edinburgh

"It's difficult to get the time off work"
Female, India, event in Newcastle

"I get four weeks leave a year. It can be hard to find the time."
Male, Canada, event in Edinburgh

"It helps if the conference is on Wednesday / Thursday because it's easier to take Friday off"
Male, UK, event in Edinburgh

New place vs been before

Trip extensions seem more likely when the delegate has not been to the destination before because of the novelty. This seems especially true of whether the person has been to the *country* before.

"The biggest factor on whether to extend a trip is whether I've been there before. If it's new, I'm much more likely to extend to see it properly for the first time."
Male, Turkey, event in Bristol

"I wouldn't stay in Edinburgh because I have been there so many times already, but I would consider using it as a base for a trip to Northern Scotland"
Female, UK, event in Edinburgh

However, not everyone agrees, and some feel comfortable with familiar places.

"I like going to places I have been to previously"
Female, Kuwait, event in London

Family and friends

If a delegate has family or friends in or near the event city, this is a significant motivation to extend. The family / friends might also provide the accommodation.

"The main factor for me to extend would always be visiting family"
Male, UK, event in Birmingham

"I booked an additional 10 days in the UK ... we [my wife and I] stayed at my brother's house most of the time"
Male, Jordan, event in Cambridge

"The main reason for travelling to Brighton after the conference was my friend's cottage – we stayed for free"
Male, Denmark, event in Oxford

Visas

If a delegate needs a visa to visit the event country, there is a sense of 'making the most' of access to that country while they have the chance – especially if obtaining a visa is difficult.

"I thought, I have to see London while I'm here as it is so difficult to get a tourist visa from Sudan"
Female, Sudan, event in Glasgow

"I only extend in countries where I need a visa"
Female, Russia, event in London

Time of year

Although trip extensions are more likely in the summer, the time of year is not a highly important factor in *whether* a trip is extended. It plays more of a part in *where* the trip is extended. Wintry months can deter extenders from visiting rural areas and keep them in the city.

"I prefer to visit countryside but if the time of year is not attractive for that and I'm in a city I've not been to before, I consider staying in the city a little bit longer"

Female, Switzerland, event in Glasgow

"The time of year only plays a role in terms of regions that have very interesting nature or are only accessible during a certain time of year"

Male, USA, event in London

Peak periods such as August can be a turn-off for some because of the busyness or the price. Conversely, a peak period due to a special event weekend in a city can be a draw for some.

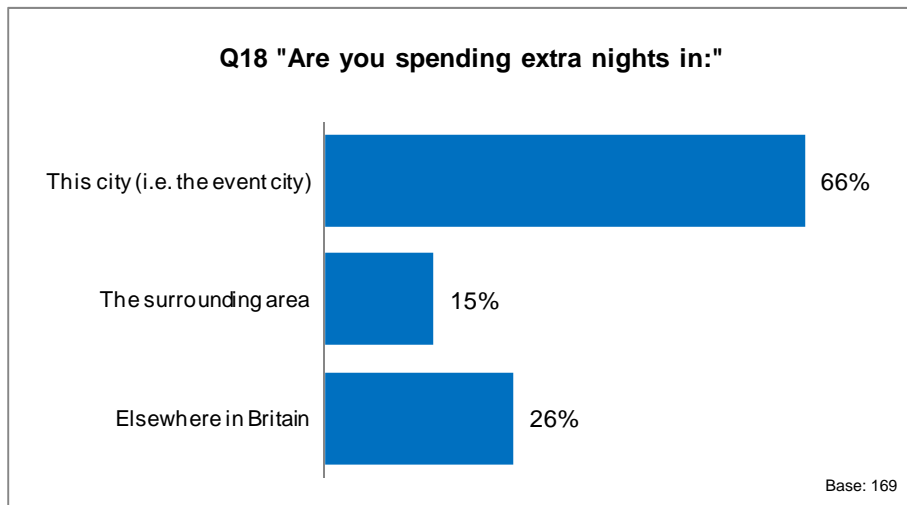
"The time of year is important for me when I extend business trips. I prefer the special seasons such as Christmas, festivals."

Female, Kuwait, event in London

"I wouldn't have chosen to go to Edinburgh in August because of the price"

Male, Canada, event in Edinburgh

Where are the extra nights spent?



Summer encourages extenders further afield; autumn keeps more extenders in the event city

- 5.9 Over a third (36%) of summer extenders spend at least some of their extra nights elsewhere in Britain; this compares to a lower proportion (18%) of spring & autumn extenders.
- 5.10 Three in four (75%) autumn extenders spend extra nights in the event city. This compares to a lower proportion (64%) of spring & summer extenders.

Further correlations

- 5.11 Extenders are also more likely to venture into other regions of Britain if they:
- Attend an event in England outside of London (39%)
 - Come from outside of Europe (39%)

"I stayed one day extra in Glasgow but went to London for another week after that"

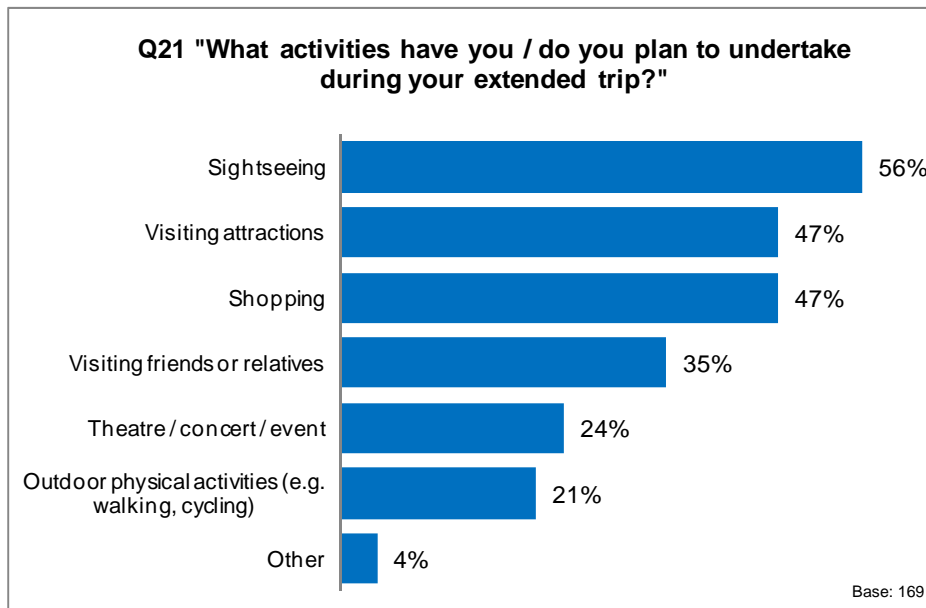
Female, Sudan, event in Glasgow

"I stayed a few nights in London ... after that I travelled to Edinburgh"

Male, USA, event in London

- 5.12 Edinburgh on the other hand attracts the highest proportion (100%) of extenders who spend at least some of their extra nights in the city, although the sample size is small (13 extenders). This is followed by London, where 80% of its extenders stay extra nights in the city.

What do extenders get up to?



Touristy behaviour

- 5.13 Extenders tend to do the classic tourist activities – the top 10 sights etc. This is mainly because a key driver for extending is seeing a destination they otherwise wouldn't see. They also might not have very much time, so the time they do have is prioritised seeing the destination's highlights.

"In London we did the typical sightseeing ... in Stratford we visited the Shakespeare house"

Male, Jordan, event in Cambridge

Extenders coming from further away tend to do more; UK extenders are more driven by visiting friends and family

- 5.14 Extenders from outside Europe generally tend to do the most activities, and extenders from within Europe (overseas) tend to do more than UK extenders.
- 5.15 UK extenders are more likely to visit friends and family (46%), although this is far from limited to UK extenders, as a third (32%) of overseas extenders also do this whilst here.

How and when do extenders plan their activities?

Fairly late planning of activities is typical

In contrast to making the decision to extend, which is normally made when booking travel soon after registering for the event, planning what they are actually going to see and do tends to get left quite late. This seems to be because many extenders are frequent travellers and therefore have the confidence to do that.

"I knew I could attend the [August] conference in March and my lab booked and bought the plane tickets for me, Everything else I organised during the conference. I only knew what day I would have to return to the US and that I was flying from Edinburgh."

Male, USA, event in London

"When I'm in the city I can be very spontaneous and I like to discover places. What I know beforehand about those places is not so important for me."

Female, UK, event in Cardiff

Not much 'hand-holding' needed

Leisure tourists vary greatly from independent, adventurous types to those who need everything organised for them. Extenders on the back of business trips seem mostly to be at the independent extreme. They are well travelled and are quite happy to 'sort themselves out'.

This means they are generally unlikely to use tourist information centres or seek much help in person. Many seem to use their own initiative online or some just 'find their way around'.

"I used Google and platforms like Lonely Planet and Airbnb to decide on the best places to see and where to stay. I did not require any assistance from any travel agency or tourist information."

Female, Switzerland, event in Glasgow

"I like to go to new places and I usually find my way around. There is not much support I would need from tourist boards."

Female, Thailand, event in Newcastle

Tasks such as hiring a car and driving on a different side of the road can be daunting for some leisure tourists to Britain, but business extenders, being well-travelled, are more likely to be comfortable doing this.

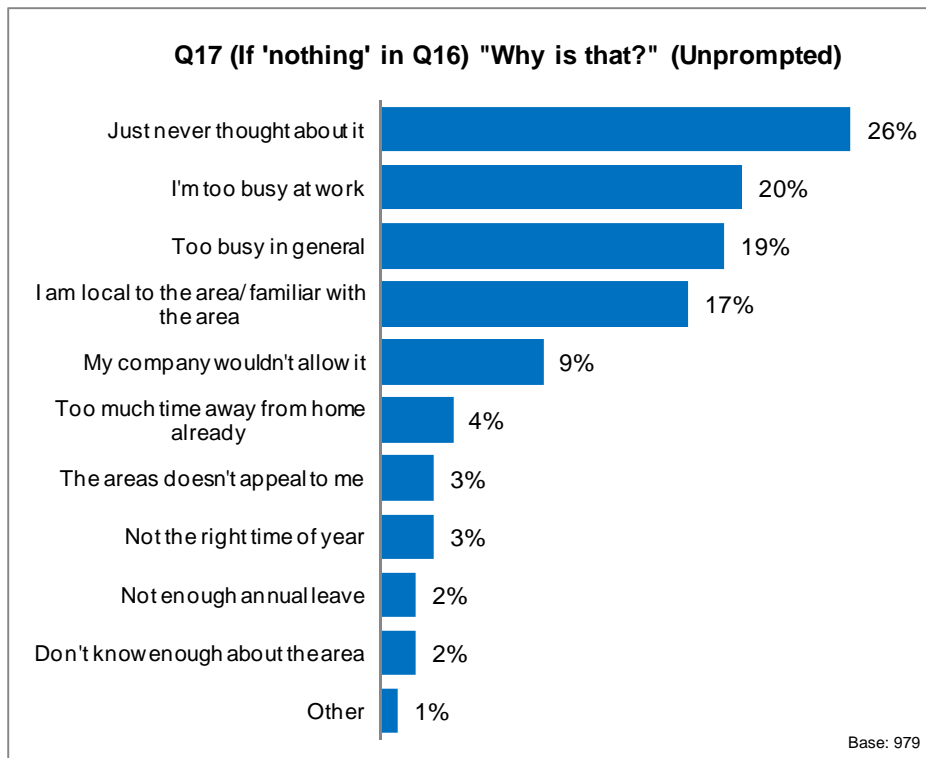
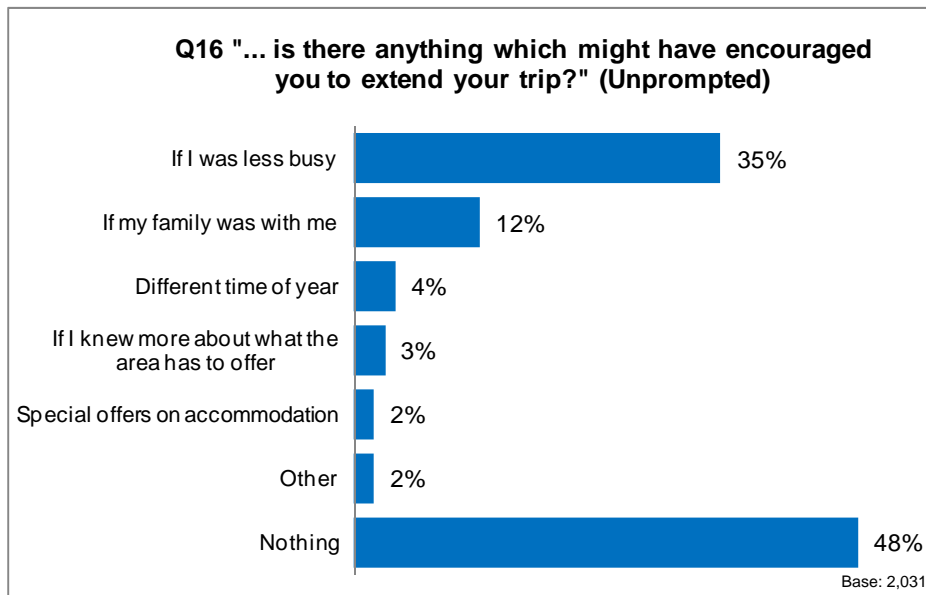
"I hired a car and drove to Oxford, Cambridge, London and Bath"

Male, Turkey, event in Bristol

"We extended our business trip for a week but left Glasgow straight away and took a ferry to Dublin. We hired a car and drove up north and explored the Northern Ireland coastline. We stayed in some BnBs in towns and a few Airbnbs in the countryside. Eventually we flew back home from Belfast. It was no problem dropping off the car in Belfast."

Female, Switzerland, event in Glasgow

Reasons for not extending



Busyness is the key barrier, not destination appeal

5.16 The above results to Q16 & Q17 show that being too busy at work and/or in general is the key limiting factor on extending trips. This supports the depth interview finding with extenders discussed earlier that those who have extended this time would extend more often if they had time.

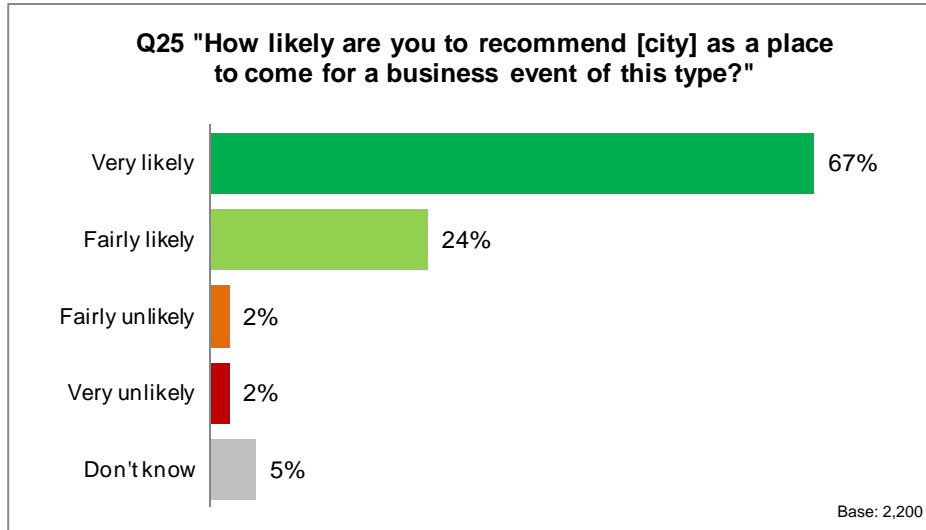
- 5.17 Also consistent with the qualitative findings is that lack of awareness or appeal of the destination is not a major factor. If delegates practically can extend, they may well do so. It does not matter too much whether they know about the destination or not, or whether it has significant appeal.

Time of year is not significant

- 5.18 The Q16 & Q17 results also reflect the qualitative findings that the time of year is not highly important in the decision to extend.

6. Likelihood of Recommending and Returning

Likelihood of recommending the city



Strong performance from British event cities

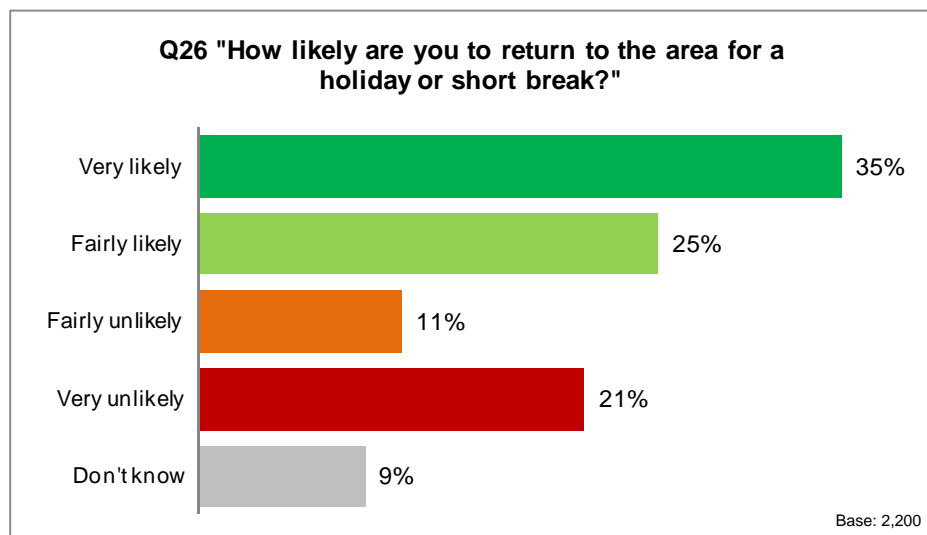
- 6.1 The strong likelihood of recommending the event city for a business event is reflected across delegates from all origins at events across the whole country. The table below shows results by city where sample sizes allow:

Event city	% answering 'very' or 'fairly' likely
Brighton	98%
Liverpool	98%
Manchester	97%
Harrogate	96%
London	95%
Bristol	94%
Edinburgh	92%
Glasgow	91%
Cardiff	89%
Birmingham	84%
Newcastle	84%
Overall	91%

6.2 The table below shows the same results grouped by broader region of Britain:

Event region	% answering 'very' or 'fairly' likely
London	95%
Scotland	93%
Rest of England	89%
Wales	87%
Overall	91%

Likelihood of returning for a holiday or short break



Very positive results across all delegate types

6.3 The likelihood of returning to the area for a holiday or short break is high across all delegate types of different ages, type of event and region of event.

6.4 The following types of delegate are particularly likely to say they will return for leisure:

- Delegates at events in Harrogate (62% 'very likely')
- Delegates from outside of Europe (47% 'very likely')
- Summer delegates (40% 'very likely')
- Women (39% 'very likely')

6.5 The table below shows the results by city where sample sizes allow:

Event city	% answering 'very' or 'fairly' likely
Harrogate	88%
Glasgow	77%
Cardiff	70%
Manchester	70%
Liverpool	69%
Bristol	63%
Edinburgh	61%
Brighton	60%
London	60%
Newcastle	57%
Birmingham	37%
Overall	60%

6.6 The table below shows the same results grouped by broader region of Britain:

Event region	% answering 'very' or 'fairly' likely
Scotland	72%
Wales	65%
London	60%
Rest of England	56%
Overall	60%

7. Implications for VisitBritain and Partners

Extension doubles spend Extending a trip doubles what a delegate would have otherwise spent. There is a strong case for investing resources to encourage extensions.

Opportunity for less appealing destinations Unlike with general leisure tourism, those who extend a business trip for leisure are not too fussy about whether a destination is iconic or not. The attraction is merely seeing a place they would otherwise not prioritise to visit.

The quantitative findings support this: incidence of extending does not vary significantly by region of Britain.

This is a key opportunity for cities and regions which lack awareness and/or appeal internationally. Overcoming lack of awareness and appeal for general leisure is a significant challenge and requires much resource over a long period of time. Encouraging business visitors who are already coming anyway to stay a bit longer when they are not overly concerned about destination appeal seems a much easier task.

Short window There is a short window of time between registering for an event and deciding whether to extend – i.e. when the flights are booked. This window presents the only good opportunity to influence the decision.

Work with event organisers To catch the short opportunity to encourage extensions, VisitBritain and partners need to work closely with event organisers. Any messages about extending need to reach the delegate before they book their flight – which is usually soon after registering.

Make it practically easy for them Practicalities are more influential on the decision to extend than destination appeal. This is because business travellers are busy people who often struggle to spend time away from work.

Therefore they need to see that they can get around very efficiently and make the most of the time they have – otherwise they may well think that extending is not worthwhile.

Quick and easy travel to and from the airport, accommodation and around the city & region highlights is therefore a very important message in encouraging extensions.

Long haul travellers are the most likely to extend Marketing messages should be tailored to different markets, bearing in mind that long haul travellers are the most likely to extend.

Visas to the UK from certain countries are hard to obtain, and this also makes extension more likely.

All year round opportunity Delegates are open to extending their trip at all times of year. This is another strong reason to invest in encouraging extensions.

Messages need to be tailored to the time of year though. In the winter months, the focus should be on the event city. If surrounding rural areas are to feature in marketing, events taking place in warmer and lighter times of the year are the ones to target for that.

Many delegates are keen to return

The majority of delegates say they are likely to return to the area of an event for a holiday or short break, especially those from overseas. We do not know how many actually follow through, but it does seem that attracting international events is a valuable way of promoting a city / region for future leisure tourism.

International events attract much higher spend

International events attract much higher average delegate spend and so would appear to be more lucrative. This needs to be weighed up against the cost of trying to attract them, as competition from overseas cities to host them is very strong.

Incentive trips

Incentive trips have by far the highest average delegate spend of any type of business event and should probably receive more focus than they currently have.

From the Module 2 research published earlier this year, incentive trips are nearly always international, and there is more scope for influencing the destination than for conferences. The Module 2 research revealed that Britain's offering for incentive trips is currently perceived as strong in London and Scotland, but more needs to be known about other parts of England and Wales.
