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An Analysis and Critique of an Evolving Conference Industry within the U.K. From Post-war to the Present Day.

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Abstract

This thesis provides an analysis and critique of the U.K. conference sector during the post-war period, in response to five hypotheses and research objectives. A pre-tested and piloted postal questionnaire was distributed to 3,000 U.K. conference venues that were drawn from secondary data sources, such as the Venue Directory. A total of 438 (14.6%) usable responses were returned. The research findings used quantitative analysis, with descriptive, explanatory, comparative and predictive research approaches also adopted. Holts linear and exponential smoothing was used to predict future trends.

The literature review concerning the classification of the U.K. conference sector identifies that many of the typologies used over the last decade are often confusing and unnecessarily protracted due to sub divisions. This research forwards a typology comprising of four mutually exclusive classifications, namely purpose-built conference venues, hotels, educational establishments and visitor attractions all with conference facilities.

This research identified many similarities and differences between the four venue classifications. Purpose-built venues initiated the U.K. conference sector during the 1950s. Hotels followed then educational establishments and finally the most recent are visitor attractions with conference facilities. Although purpose-built venues were the originators of the modern U.K. conference sector, growth rates from the other three venue classifications have, at one time or another exceeded that of purpose-built venues during the post-war period.

Purpose-built venues were established in response to demand and were not initially economically focused, whereas the other three venue classifications added conference facilities to generate additional revenue sources and thus were economically motivated. The 1990s were the first decade in which over 37% of each venue classification opened their conference facilities, thus competition grew by over one third within the 1990s. The 1990s were also the most popular decade in which venues across the U.K. conference sector refurbished, with cosmetic changes such as upgrading furnishings and décor commonplace. Such

refurbishments were undertaken to keep pace with customer's demands, offering higher standards along with the need to modernise. Overall such refurbishments are viewed as a response to increased competition, cited by all venue classifications as a key issue encountered.

Butler's Lifecycle Model was utilised to explain the development of the U.K. conference sector, identifying that each venue classification has passed through its lifecycle at differing rates, with purpose-built venues having the longest lifecycle, but progressing through its lifecycle the slowest. Visitor attractions have the shortest lifecycle of the four venue classifications.

Respondents perceive the future of the U.K. conference sector as positive, with increasing numbers of venues forecasted to open in the current and subsequent decade. Hotels conference venues still dominate the sector, although visitor attractions are predicted to experience the greatest levels of growth over the current and future decade. The majority of educational establishments and visitor attractions plan to refurbish in the future, whilst the majority of purpose-built venues and hotels do not. Where refurbishment is planned, cosmetic changes to furnishings and décor are commonplace, along with the installation of modern conference equipment and health and safety issues. The majority of future refurbishments are planned to occur within the first half of the current decade. Overall respondents perceived the future of the U.K. conference sector to include continued growth and increased competition.

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AN ANALYSIS AND CRITIQUE OF AN EVOLVING CONFERENCE INDUSTRY WITHIN THE U.K. FROM POST-WAR TO THE PRESENT DAY.

CHAPTER ONE – DEFINITIONS AND STRUCTURE

1.1 – Introduction

From post-war to the present day the conference sector has experienced considerable global growth. The conference sector has evolved and major changes have taken place. During the pre-war era, the conference sector was in its embryonic stage. It was not until the end of the Second World War with the growth in business travel that the conference sector expanded in line with business travel (Davidson & Cope, 2003). This growth rate has not necessarily been in a straight line, it has peaked during times of prosperity and slowed in times of recession. Nevertheless, the conference sector has emerged, evolved and advanced throughout the past five decades. Additionally, the sector has evolved in many different forms, from large government funded projects to smaller conference venues within visitor attractions.

Due to this expansion and diversity, the United Kingdom (U.K.) conference sector of the 21st century is very different to the conference sector at the end of the Second World War. “The industry has grown and competition has intensified” (Robinson & Callan, 2002, p.1). The modern day conference sector is one of the fastest growing and highest yielding sectors within the overall tourism industry, it is an important generator of tourism expenditure, investment, foreign exchange earnings and employment (Abbey & Link, 1994; Dwyer & Forsyth, 1996; Oppermann, 1996a). The International Congress and Convention Association (ICCA) estimated that in the year 2000, the U.K. catered for 8.85% of the global meetings demand, ranking it second on the basis of market share for global meetings (Leask & Spiller, 2002). The U.K. conference sector is therefore an important competitor in the global conference market place. It should be understood that conferences are a sector of the tourism industry and not an industry within its own right.

1.2 – The structure of chapter one

Overall, this research will progress from the general to the specific, starting with Chapter One in which the aim, objectives and hypotheses of this research are stated and justification in support of this research is provided. This chapter then focuses on the challenges faced in researching the conference sector. This includes key definitions and terminology, for example explaining the historical development of these definitions, to highlight changes within the evolving academic theory behind the sector. Other research challenges facing the conference sector are its fragmented and global nature, along with incoherent data sources upon which academic research is based. Other disciplines which researchers have drawn upon will be identified, these include economics, human resource management, marketing, service quality and lifecycle models. Key organisations will then be discussed, identifying the fact that there is little cohesion between official organisations. “These research challenges are deemed to be most important in relation to the development of further research within the conference sector” (Ladkin & Spiller, 2001 p.195). Chapter One continues by outlining the current state of the U.K. conference sector and concludes by outlining the contents of subsequent chapters.

1.3 – The research aim, objectives and hypotheses

With the U.K. conference sector now a significant player in the global conference market (Leask & Spiller, 2002), the overall aim of this thesis is to provide an analysis and critique of an evolving conference industry within the U.K. from post-war to present day. This will be achieved through the collection and analysis of empirical data, in order to identify any changes within the market place, such as updating conference technologies, renovating existing venues and through the construction of new facilities to keep in line with conference developments of the 21st century.

In achieving this overall aim, this research has the following objectives:

1. To outline the characteristics of the different classifications of the U.K. conference sector. Additionally, this research will analyse if the existing classifications are the most appropriate to use in segmenting conference supply.
2. To identify which classification of conference venue development accounted for the most significant growth in the U.K. conference sector.

3. To outline reasons for the development of each venue classification and to explore the mechanisms used to diversify into the conference market.
4. To forecast the future development for each of the venue classifications identified.
5. To test if the lifecycle model can be used to explain the development of the U.K. conference sector.

These objectives will answer the following research hypotheses:

- Current classifications of conference venues are an appropriate way to segment venue supply (Objective One)
- Purpose-built venues were responsible for the most significant growth in the U.K. conference sector (Objective Two)
- Changes to venue facilities were economically driven (Objective Three)
- Future composition of the U.K. conference sector will continue to be dominated by hotel conference venues (Objective Four).
- The lifecycle model can be used to explain the development of the conference sector (Objective Five)

The rationale for examining research objectives in these areas is as follows.

Rationale for Objective One

- Industry publications such as the Venue Directory currently use a variety of classifications to describe U.K. conference venues including purpose-built, hotels, universities, miscellaneous and unusual venues. Other classifications are used within the relevant literature, including Lawson (2000), who uses three venue classifications that of purpose designed, adapted use and occasionally used, along with Davidson & Cope (2003) who use conference centres, hotels, academic venues, residential conference venues and unusual venues to classify conference venues. It is clear from this sample list that some common focus is required within the classifications employed to describe the U.K. conference sector. As such this research objective is to undertake an extensive literature review to examine the classifications used to describe the U.K. conference sector.

- This research will identify the most appropriate classifications for the U.K. conference sector based solely on the literature review, thus pre-empting the sub-division of the U.K. conference sector prior to the research being carried out, rather than establishing venue classifications from the findings. The reason for doing so was to ensure that appropriate questionnaires were developed asking specific questions for each classification, rather than an extended generalised questionnaire which relies on the use of appropriate sub-sections, encompassing all classifications which has the potential to de-motivate respondents. Discussions on identifying appropriate venue classifications which are subsequently used to develop a theoretical framework for this research are undertaken in Chapter Four.

- Once appropriate classifications have been identified, the characteristics of each venue classification shall be examined, including ownership and facilities offered, with the aim of identifying both similarities and differences between venue classifications.

Rationale for Objective Two

- This research is concerned with the historical development of the conference sector and thus it is necessary to identify the patterns of conference venue development. This research aims to identify when purpose-built facilities and the other venue classifications initially opened and in which decade they subsequently diversified their core product to offer conference facilities. Additionally, it will identify the decade of greatest growth for the U.K. conference sector. Evidence suggests increasing market opportunities and benefits of the conference sector has resulted in an acceleration in the provision of facilities (Lawson, 2001) and this research will test whether or not this is the case.

Rationale for Objective Three

- One of the features of the U.K conference market is the diversity of venue classifications. Given the different times and features of the development of conference supply, an understanding of the patterns of diversity would give a clear insight in the structure of this sector.

Rationale for Objective Four

- This research also aims to forecast, using statistical analysis, future development for each of the venue classifications identified. In doing so, this research shall identify for each venue classification the stage of Butler's (1980) lifecycle model they are currently passing through, including the lifecycle characteristics that should be expected. In doing so, actions undertaken to rejuvenate the conference products will be identified, including aspects of service quality because "the quality of provision is becoming increasingly important to customers when differentiating between venues" (Robinson & Callan, 2002 p.2).

Rationale for Objective Five

- This research takes a historical approach and uses the lifecycle model to explore the trends in conference venue development from post-war to present day. The lifecycle model is used in many other areas of tourism in relation to destination development (Douglas, 1997; Priestley & Mundet, 1998; Agarwal, 2002) and could therefore be used as a model to test the lifecycle of conference venues.

1.4 – Challenges faced by researchers within the conference sector

In undertaking the collection of primary data within the conference sector to answer the research aim, objectives and hypotheses, it is important to understand the challenges that face researchers so that this research provides a valid critique of the conference sector.

A number of challenges are faced by those who undertake research within the conference market, one of which is the globalisation that is occurring within the conference sector. As national borders diminish and multinational institutions emerge, such as the integration of Europe and the inclusion of Eastern and Central European countries into the European Union, nations refocused away from inward-looking trade regimes towards more outward-focused trade policies (Go, Govers & Vliegenthart, 2002). Examples are seen in countries with traditionally high protectionist policies, such as Russia and the Eastern European nations, China and India, all of which have opened their economies to international trade. This change in global trade patterns has created increased movement of goods, services, technology and capital (both human and physical) between nations (Go, Govers & Vliegenthart, ibid). A 'causal' relationship between trade and international travel has been identified (Kulendran & Wilson, 2000b), with a significant increase in international travel, particularly business travel, between countries that are associated with this trade expansion (Kulendran & Wilson, 2000a).

As trade restrictions reduce and international trade travel increases, so the globalisation of the conference sector is a logical consequence of these actions (Go, Govers & Vliegenthart, 2002). However, despite this trend, it is important to keep in mind that there are still and will always be, substantial differences between nations. Many nations remain in the emergent stages of conference development, such as Africa, Eastern European countries and parts of Asia (Spiller, 2003) and as such different opportunities and challenges face each national conference sector with regards planning, development and management (Go, Glover & Vliegenthart, 2002; Price & Becker, 2002). In spite of the sector's increasing global presence, it is a sector that is fragmented geographically. (Ladkin & Spiller, 2001).

Additionally, the conference sector, like the tourism industry in general, is an amalgamation of many different elements including buyers (corporate, association and government); suppliers (destinations and venues, accommodation and service providers); agencies, intermediaries and industry organisations (trade associations, national tourism organisations, trade media, industry consultants, convention bureaus and educational institutions) (Ladkin & Spiller, 2001). The conference sector should not be considered as a homogeneous market (Pearce 1989; Weirich, 1992; Montgomery & Strick, 1995; McCabe et al, 2000; Rogers, 2003). Furthermore, it is not an isolated sector, but is complex and inter-linked with other sectors of the economy. The conference sector is a "multimillion pound business, but it is not generally perceived as a separate entity, as its fortunes are bound up with that of the hospitality and tourism industry" (Shone, 1998 p.3).

For researchers, the challenges brought by this complex, global and fragmented nature of the conference sector are threefold, namely the collection of accurate data is geographically fragmented, the lack of coherent data and a lack of existing academic research.

1.4.1 – Accurate data is geographically fragmented

Although the International Congress and Convention Association (ICCA), the International Association of Convention and Visitor Bureaus (IACVB) and the Union of International Association (UIA) collect data worldwide, in the majority, the collection of conference statistics remains with individual countries. However, due to the differing emergent stages of conference sector development within nations, "many governments and organisations have only just begun to realise the importance of the industry and relatively little importance has thus far been given to the collection of statistics on a national and global scale" (Ladkin, 2002 p.107). Due to this fragmentation, the challenge facing the sector is the ability to unite and to speak as one (Go, Govers & Vliegenthart, 2002). As a consequence, not only is the sector geographically fragmented, but the data upon which research is reliant is also geographically fragmented (Ladkin & Spiller, 2001).

1.4.2 – The lack of coherent data

As a result of the fragmentation of data collection there is a lack of coherent and accurate data that researchers can utilise. The reliability of data concerning the size of the conference sector is weak due to inconsistencies in definitions and measurements (Crouch & Ritchie, 1998). Within Asia, the Asian Association of Convention and Visitor Bureaux (AACVB) state that the terms 'conference' and 'event' are commonly used interchangeably and as a result it is difficult to establish the economic contribution of the conference sector. Additionally, within Asia few hotels maintain accurate records of conference trade and in many cases business tourism is not disaggregated from overall visitor arrivals (Carlsen, 1999).

1.4.3 – The lack of existing academic research

With data being both geographically fragmented and incoherent, a further problem facing researchers is the lack of existing academic research in the sector to reference, with little academic research being undertaken in this sector prior to the 1980s (Ladkin & Spiller, 2001). From the 1980s onwards, authors have provided overviews of the conference sectors. The most recent overviews are from Rogers (1998; 2003), Lawson (2000), McCabe et al (2000), Weber & Chon (2002), Davidson & Cope (2003) which have created an awareness of the conference sector as a whole, with academic research predominantly a product of western Europe, the United States (U.S.) and Australia (Ladkin & Spiller, 2001; Spiller, 2002). These three regions have both mature conference destinations (Spiller, ibid) and have developed university disciplines in tourism, business and marketing in which research into the conference sector can flourish. However, critics of the academic research produced say that it is fragmented and difficult to compare both temporally and spatially and that research has omitted to examine the crucial link between business and leisure travel (Dwyer & Mistilis, 1999b).

As academic research in the conference sector has grown, there has been an increasing number of publications concerning the sector, including academic papers, books and journals. The Journal of Convention and Exhibition Management, renamed in 2002 to the Journal of Convention and Event Tourism, is specifically dedicated to conference and event research. In addition, a number of tourism and hospitality journals frequently publish research on conference activities. These are the EIU Travel and Tourism Monitor, the Cornell Hotel and Restaurant Administration Quarterly, the Journal of Travel Research., Annals of Tourism and Tourism Management.

"Clearly the challenge for research is to encourage the collection of statistics at all levels and to improve the accuracy of data collection methods by developing standards or best practice for industry guidelines" (Ladkin & Spiller, 2002 p.108). In order to correct the deficiencies in data collection, definitions used must be well defined and accepted on a wide-scale in order to carry out research. In doing so, statistics can be accurately compared (Ladkin & Spiller, ibid). This research supports this view and aims to add to the existing knowledge base of the U.K. conference sector by collecting primary data from a U.K. industry-wide sample population. This research examines the supply side of the U.K. conference sector, adding to the existing conference venue body of knowledge regarding venue classifications, identifying the most significant growth in the U.K. conference sector and identifying changes to conference venues. Additionally, this research adds to the existing body of knowledge by predicting the future composition of the U.K. conference sector. Thus, adding both coherent data and academic research that can be utilised in future research.

1.5 – The collection of conference related statistics

The conference sector has three main associations that collect data across different countries; they are the International Congress and Convention Association (ICCA), the Union of International Association (UIA) and the International Association of Convention and Visitor Bureaus (IACVB).

1.5.1 – International Congress and Convention Association (ICCA)

The ICCA was founded in 1963 and is based in Amsterdam. It currently has over 550 members in 76 countries. Its data research department maintains an extensive database on the location of international meetings, which have to fulfil strict criteria in order to be included. This criteria are that meetings;

- Must attract at least 50 participants.
- Must be organised on a regular basis, therefore one-time meetings are not included.
- Must be rotated between at least four different countries (http://www.icca.nl/index.htm).

However, "the ICCA does not claim to cover all meetings of all international associations and the figures refer to ICCA members only, usually on a sample basis" (Ladkin & Spiller, 2000 p.9).

1.5.2 – Union of International Association (UIA)

The UIA is based in Brussels and it has collected annual statistics on international meetings worldwide since 1949. Its congress department collects statistics that adhere to the following criteria;

- The minimum number of participants for conference events is 300.
- The minimum number of foreign participants is set as 40% (not including host country).
- All conference events must involve representation from at least five countries.
- All events must last for at least three days. (UIA, 2000)

The UIA and ICCA data viewed with caution as both organisations collect data on member conference venues only. Major disparities occur when comparing both organisations definitions, thus making it impossible to make comparisons between the organisations. A second major concern with both organisations is that they collect information on large international conferences only. Therefore, the majority of conferences that are of a smaller scale and predominantly non-international, are not recorded within their data collection (Ladkin & Spiller, 2002; Ladkin, 2002). The third trade organisation is that of the International Association of Convention and Visitor Bureaus (IACVB).

1.5.3 – International Association of Convention and Visitor Bureaus (IACVB)

The IACVB is an important organisation that acts as a clearinghouse for the exchange of sector data, ideas and information. "It represents the major conference cities throughout the world and has 395 member bureaus worldwide" (Ladkin & Spiller, 2000, p12). It maintains a digital information network entitled the Computerised Information Network (CINET) that captures both demographic and historical data on organisations holding meetings. This organisation periodically undertakes a Convention Income Survey, which aims to identify delegate expenditure and is therefore designed to measure the monetary value of conference business, thus permitting a host destination to estimate the value of a conference to the host community (Ladkin, 2002).

As stated, there is no single body for data collection and no widely accepted method for the data collection, thus this lack of unified data collection methods has created significant concerns with respect to temporal comparability and between both venue classifications and nations.

1.6 – Theoretical concepts that have been applied to the conference sector

In light of the challenges faced by researchers within the conference sector, theoretical concepts from other disciplines, such as economics, human resource management, marketing, service quality, along with lifecycle models, have been applied to the conference sector to provide greater understanding of the sector. One aspect of economics that has been applied to the conference sector is that of 'economic contribution'. Literature now exists in relation to estimating the economic contribution of special events (Burns, Hatch & Mules, 1986; Burns & Mules, 1989; Getz, 1994; Crompton, 1999). Such literature, with its associated methodologies and frameworks, has been applied directly to the conference sector (Dwyer & Forsyth, 1996; 1997; Dwyer, Mellor at al, 2000). In establishing the economic contribution made by a conference, the sector can be compared to other business activity, thus providing a measure of its importance (Dwyer, 2002). Within the U.S., the economic impacts of the conference sector have been extensively researched by Fenich, (1992; 1995; 1997), Braun (1992), Rutherford & Kreck (1994) and Grado, Strauss & Lord (1998).

Additionally, research within the conference sector has drawn upon the theories and concepts from human resource management. With the conference sector being firmly embedded in the tourism and hospitality industry, human resource issues identified in this broader context have been applied to the conference sector (MacLaurin, 2002). McCabe et al (2000) has examined attracting and retaining staff, in spite of the sectors perceived lack of status (Rogers, 1998) and the high turnover rates of staff that are prevalent within the broader tourism and hospitality domains (McCabe & Weeks, 1999). Issues of career progression, an issue identified by the International Hotel and Restaurant Association (IHRA) (2000) within the global hospitality industry, has been applied to the conference sector by Rogers (1998), who stresses the need for career structures within the conference sector in order that "experience and expertise are retained" (MacLauren, 2002 p.83). Research into other human resource issues identified within the wider tourism and hospitality domains have been applied to the conference sector, namely remuneration levels (Professional Convention Management Association, 2000) legal issues (Montgomery et al, 1995) and the impact of technology on human resource practices (Buhalis, 1998; Mistilis & Dwyer, 1999; Fox, 2000).

Marketing theories and concepts have also been drawn upon by researchers in the conference sector. Some destinations consider the marketing of their conference product as merely "an exercise in promoting a destination" (Crouch & Weber 2002 p.57), although effective marketing is more than simple promotion. In light of this, the 7-P model which encompasses the product, place, promotion, price, people, physical evidence and process has been applied to the conference sector (Zeithaml & Bitner 1996).

Associated with the successful marketing of a venue, is the site selection and service quality research, which is discussed further in Chapter Five. Researchers have identified that large-scale customer demand for quality products and service, has become increasingly evident to professionals in the tourism industry (Lam & Zhang, 1999). One of the biggest contemporary challenges of management in service industries is providing and maintaining a quality product (Su, 2004). Service quality has increasingly been identified as a key factor in the battle for competitive differentiation and customer retention. Among all customer demands, service quality has been increasingly recognized as a critical factor in the success of any business (Parasuraman et al, 1988; Gronoos, 1990). Within the U.S. a number of studies have drawn on the theory of service quality to explain conference and meeting venue site selection (Reneghan & Kay, 1987; Shaw, Lewis & Khorey, 1991; Bonn, Brand & Ohlin, 1994). Whilst in the U.K. researchers such as Oberoi (1989), Meetings Industry Association (MIA) (1990), Callan & Grayson (1997) and Robinson & Callan (2002) have drawn on the theory of service quality and applied them to the conference sector. Both U.S. and U.K. studies support the view that once the characteristics of service products have been consistently identified and comprehended, service providers will be able to act proactively with regards consumer requirements, rather than reactively to customer dissatisfaction (Robinson & Callan, 2002).

Finally in order to gain an understanding of destination growth and decline, lifecycle models have been applied to destinations. There has been limited application of lifecycle models to explain the conference sectors development, but researchers have examined the use of conference venues as tools to rejuvenate a destination (Knowles & Curtis, 1999; Agarwal, 2002).

This list of disciplines utilised by researchers within the conference sector is by no means exhaustive, but identifies the many different categories of academic research within the conference sector. The development of a lifecycle model provides a temporal analysis of the subject matter. This research is predominantly concerned with such a temporal analysis on the U.K. conference sector during the post-war period, including actions taken when the product is perceived to be declining, such as rejuvenation through service quality improvements. Thus, accepting that there are numerous concepts, theories and models that can be drawn upon from disciplines outside the realm of conference research, in order to increase the understanding of the conference sector, it is with the application of lifecycle models and service quality that this research shall concentrate on.

1.7 – Definitions of the conference and meeting sector

In examining the evolution of the conference sector, it is essential to identify the foundations upon which the modern conference sector is built.

1.7.1 – The historical terminology of meetings and conferences

Individuals have gathered together to discuss and make decisions for centuries. Archaeological excavations have found primitive ruins of common areas in which people would gather to discuss "communal interests, such as hunting plans, war-time activities, negotiations for peace or the organisation of tribal celebrations" (Montgomery & Strick, 1995 p.4 cited in Spiller, 2002). Commerce and human interaction have both focused on cities (Gartrell, 1992) and excavations within cities of ancient Rome have found that certain buildings existed for undertaking debates and meetings. The Roman Forum, a public square located in the city centre, was utilised for public discussion, judicial and other business, along with the Rostra, which was used for political debates and historical speeches, while meetings of the Senate took place at the Comitium (Spiller, 2002).

Many terms currently used in the conference sector are based on Latin terms, for example 'conference' is derived from the Medieval 'conferentia and 'auditorium,' from 'auditorius' (Thompson, 1995). Within the conference sector, definitions and related words are continually challenging this sector. "The problem is not simply one of trying to find a definition, but of sorting through a myriad of competing definitions to find those definitions for tourism-related phenomena that can be accepted across political jurisdictions" (Smith, 1997 p.39). Smith (ibid) continues by stating "the need for accurate and comparative data grows annually and that need is helping to drive the global tourism industry towards greater consistency in definitions and data collection procedures." It is therefore essential that definitions are provided for key terms used within this research, these definitions include:

- Activity types (conferences, conventions, congresses, meetings)
- Buyers (association, corporate, government)
- Delegates (participants, delegates).

1.8 – Activity types; conferences, conventions, congresses and meetings

This research is concerned with the U.K. conference sector, thus it is essential that the reader understands the definition used within this research for the term conference.

1.8.1 – Conferences

The British Tourism Authority (BTA) first defined a conference in 1977 as;

- A meeting held in hired premises.
- Lasting a minimum of six hours.
- Attended by a minimum of 25 people.
- Having a fixed agenda or programme (Lawson 1981, p.1).

The U.K. conference sector has evolved and changed since the end of the Second World War, competition has also grown over the same period and the U.K., in 2000, was ranked second on the basis of its share of the global meetings industry (Leask & Spiller, 2002; Robinson & Callan, 2002; Davidson & Cope, 2003). With such changes occurring, the BTA chose to modify its previous definition of a conference as it was considered outdated and in 1998 the BTA updated its definition. The latest BTA definition states that a conference is "An out of office meeting of at least six hours' duration involving a minimum of eight people" (British Tourism Authority, 2000). The key change relates to the number of attendees, reducing this from 25 to eight. This reduction should be seen as the BTA accepting that a large proportion of conferences are held with less than 25 delegates. By lowering the number of attendances to eight, more conferences are now included in the definition. This should promote accurate statistics, as it now exposes the importance of smaller conferences. However, it will provide an artificial expansion in the number of conference as smaller conferences are now included. It should also be noted that comparisons between pre-1977 and post-1977 statistics will be problematic due to these changes in definitions. Support for this definition comes from Falk & Pizam (1991) who state that conferences are not strictly for business people and professionals but also for people who meet periodically in groups as small as 15 and as large as 10,000 to discuss and exchange ideas on medical, political, religious, environmental and every other possible topic.

Other authors differ in their definitions. Conferences are large events and may attract hundreds or thousands of people. They often last for several days and involve a social programme and exhibition which has an international audience and are events of national and international interest (Seeking, 1996). Oppermann (1996a) & Lawson (2000) support this view that conferences have large numbers of participants, "The number of delegates attending a conference may range up to 150 or more, but 30-50 is more typical" (Lawson, 2000 p8), although these participants are usually from the same company, association or profession. Oppermann (1996a) and Lawson (2000) also state that conferences are primarily concerned with planning, obtaining facts and information, or solving organisational and operational problems.

1.8.2 – Meetings

A similar definition is provided for meetings as they are also viewed as a gathering of individuals to share knowledge and make decisions (Webster, 1974; Rutherford, 1990). However, Rutherford extends this definition by considering a meeting as having few attendees. Seekings (1996, p.18), agreeing with Rutherford, suggests that "A meeting is usually a much smaller event, often involving a few executives discussing business round a boardroom table." In

1993, the Convention Liaison Council and the Joint Industry Council, who publish the International Meetings Industry Glossary (IMI Glossary), defined a meeting as a general term indicating “the coming together of a number of people in one place, to confer or carry out a particular activity” (Ladkin & Spiller, 2000 p2). This definition contained no limit (upper or lower) on the number of attendees.

This research supports the view of Rutherford (1990), Seekings (1996), Falk & Pizam (1991) and the British Tourism Authority (2000), in that meetings have fewer attendees when compared to conferences and this level of attendees is the differentiating factor between meetings and conferences. As this research focuses on the U.K. conference sector and in order to gain the largest survey population possible, the BTA definition that a conference can take place with eight delegates will be accepted for this research. Additionally, within the research questionnaire sent to respondents, the terms meetings and conferences were associated together in order to eliminate any confusion with regards the number of attendees and their associated definitions.

1.8.3 – Congresses and Conventions

The terms conference, congress and also convention are often used interchangeably within the literature, depending on the country, international emphasis or author’s preference. For example, the U.K. tends to uses the term ‘conference’ as a generic term for all meetings, where as the U.S., Australia and Asia use both the terms convention and congress interchangeably, as such they have the same meaning (Spiller & Ladkin, 2001).

The term convention is commonly used to describe the traditional form of annual meetings (Astroff & Abbey, 1998) or total membership meetings of the sponsoring organisation or association (Rockett & Smillie, 1994). Within the U.S., over 80% of associations annually hold conventions for their entire membership, with many corporate bodies undertaking similar conventions for work-related and social purposes that are often linked to incentive travel (Lawson, 2000). Rutherford (1990), Seeking (1991) and Lawson (2000) all offer broader definitions, stating a convention is an assembly of people from a political, social, professional or religious group for the exchange of ideas, views and information for some common purpose. A convention is often periodical and accompanied by an exhibition of products or services. This compares to a congress, which is viewed as "an assembly or conference for the discussion or settlement of some question" (Lawson, 1981 p.1).

It is clear from the literature review that the terms conference, congress and convention are widely used interchangeably, depending, as stated, on the country, international emphasis or author's preference. As the literature above suggests, many of the definitions vary slightly in terminology from country to country. The term conference shall be used within this research. The second set of definitions shall be discussed, that of buyers, such as corporate, association or government.

1.9 – Buyers; corporate, association and government conferences

Various authors divide the buyers or demand generator for conference venues into two conference markets: these are the association and corporate conferences (Chon, 1991; Abbey & Link, 1994; Richards & Richards, 1994; Opperman, 1996a, 1997a; Choi & Boger 2002). The British Conference Market Trends Survey (British Tourist Authority, 1998) extends this classification by adding a third division, that of the government conference market, which "is sometimes defined separately as a third market but the characteristics are similar to that of the association markets" (Ladkin & Spiller, 2000 p.6).

1.9.1 – Corporate conferences

Corporate conferences accounted for more than 65% of all meetings U.K. in 1999 (Lawson, 2000). They are driven by business needs and take a variety of forms including board, management and shareholder's meetings, as well as partner, supplier and client meetings. The corporate meetings sector can be further subdivided into manufacturing, distribution, retail and services (McCabe et al, 2000).

The corporate conference sector contains a number of unique characteristics. They tend to have a small number of delegates, generally less than 100, with the majority being attended by between 26 and 50 delegates (Robinson & Callan, 2001), and are often short in duration (Lawson, 2000). Research from within the U.K. identifies that 50% of corporate conferences were attended by 100 delegates or less and that 40% lasted for one day only (British Tourist Authority, 1998). In light of these facts, the majority of corporate meetings have short lead times and are held within hotels facilities as part of an incentive package to their delegates (British Tourist Authority, ibid). Corporate delegates are usually employees of the business and are paid to attend such meetings, hence their mandatory attendance is required (Hoyle et al, 1995; Opperman & Chon, 1997) and hence return on the investment (cost and time) is a key priority (Crouch & Weber, 2002).

1.9.2 – Association conferences

Association conferences differ from corporate conferences, in that they have larger delegate numbers and are often longer in duration. Research by the BCTMS (1998) showed that in 1997, 60% of association conferences lasted for three days or more, with more than a third being attended by over 500 delegates. Such meetings are defined as "An organisation of persons having a common interest. The common interest can relate to a variety of interests such as vocational, recreational or political" (Hoyle et al, 1989, citied by Falk and Pizam, 1991, p.115). The main objective of the majority of association conferences is to provide services to members, with most events being deliberately non-profit making.

Association delegates choose whether to attend the conference or not, possibly requiring delegates to pay their own expenses, meaning that this market may be price-sensitive. Unlike corporate meetings, attendance at association meetings is optional, as the delegates pay their own registration fee and accommodation (Hoyle et al, 1995; Opperman & Chon, 1997). Overall association meetings are some of the largest held throughout the world, indeed larger that corporate meetings (Crouch & Weber, 2002). Association members meet for several purposes such as the giving and gathering of information, planning activities of the association or electing officers as leaders (Falk & Pizam, 1991). Due to these characteristics quite often an annual association meeting can create demand for delegate accommodation across the entire destination. Richards & Richards (1994) use the examples of Blackpool and Brighton, as association conference destinations due to their large conference centre capacities and wide range of accommodation available in both towns.

1.9.3 – Government conferences

Government conferences refer to central and local government, as well as statutory agencies, sponsored meetings and public enquiries that hold conferences and meetings (Ladkin & Spiller, 2000). "This category includes national government bodies, local government bodies, chambers of commerce and agencies such as English Heritage" (Shone, 1998, p.28). These are considered to be non-profit organisations, with delegates not normally expected to pay to attend conferences. Therefore government events tend to be run on tight budgets (Leask & Hood, 2000). The health and education sectors are two important public sector activities, which are heavily involved in organising business tourism events" (Swarbrooke & Horner, 2001 p.41).

1.10 – Delegates and participants

The people engaging in conference activities are often referred to as delegates or participants, with the terms often being used interchangeably. However, a 'participant' is used particularly for people attending training programmes (Shone, 1998, Seekings, 1996). Whereas, Swarbrooke & Horner (2001, p.342) state that a delegate is "a person attending a conference or meeting, although technically it is a voting representative at a meeting." This research shall use the term 'delegate' to identify those attending conferences and where applicable the term 'non-delegate' to describe all other hotel guests spending at least one night at the hotel.

1.11 – The U.K. conference sector

The 1990s were a decade of considerable growth for the U.K. conference sector (Robinson & Callan, 2002; 2003). However, over the first years of the current decade, the average number of delegates per conference, the average conference duration and indeed the number of conferences have all shown a reduction. This reduction was highlight by the BTA in 1998 (British Tourist Authority, 1998; Meetings Industry Association, 2002; Davidson & Cope, 2003; PriceWaterhouseCooper, 2003). In 2001, the UIA identified the U.K. as the principal European destination for conferences (PriceWaterhouiseCooper, 2003) and data published by the ICCA in May 2002, identified that in 2001 the U.K. was ranked second globally in respect to the market share of the global conferences, behind the U.S. (Rogers, 2003). In 2001 the U.K. conference sector contributed approximately £7.3 billion to the U.K. economy. This is an increase of 10.6% on £6.6 billion in 2000. This £7.3 billion was generated from an estimated 1.4 million conferences, defined as involving eight or more delegates, taking place at U.K. venues (British Tourism Authority, online, 2002).

Around three-fifths of all U.K. conferences are organised as corporate events (59%), a quarter (25%) being held by government and 14% by associations. U.K. non-residential conferences attracted on average 46 delegates, whilst an average of 50 delegates attended residential conferences. Fifty or fewer delegates attended approximately three-quarters (74%) of non-residential conferences, while 50 or fewer delegates attended 72% of residential conferences (British Tourist Authority, 2002). These findings suggest that the majority of U.K. conferences are small scale and thus require small venues. However, many conference venues have facilities to host larger events. Just over half (56%) of venues offer a maximum conference capacity (e.g. single largest area, theatre style) of between 101 and 500 delegates. The average maximum capacity of a U.K. conference venue is 391 delegates, which is slightly fewer than the average recorded in the 2000 survey, at 410 delegates (British Tourist Authority, 2002).

The British Conference Market Trends Survey report (2002) also details that overseas delegates attended 20% of residential conferences, this compares to

13% of non-residential conferences. A professional conference organiser or a venue finding agency was used to book a third of all conferences (34%). Similar proportions of non-residential and residential conferences were booked using this method (34% and 33% respectively). This suggests the majority of conferences are booked directly with the conference venue rather than a professional agency.

Demand for conference venues has increasingly been met by hotels and by 1990 hotels led the market in terms of supplying conference facilities, accounting for 77% of all conference venues and 68% of all delegates' nights (Travel Industry Monitor, 1991). This is still true at the beginning of the current decade, however, the use of other venue classifications, such as sports stadia, museums and castles is increasing (Leask and Digance, 2001; Leask and Hood, 2000; Leask and Spiller, 2002; Leask, 2003) and university facilities (Paine, 1993; Davidson and Cope, 2003). With the increase in the number and range of conference venues comes both increased competition and the use of quality to differentiate between conference venues. There is large-scale customer demand for quality products and service within the tourism industry (Lam & Zhang, 1999). Table 1.1 summarises the U.K. conference sector in 2001.

Table 1.1 – Summary of the U.K. conference sector

	All U.K Venues
Non-residential conferences	
Estimated volume	1.4 million
Average duration	1.4 days
Average size	46 delegates
Average achieved day delegate rate	£35
Residential conferences	
Proportion of conferences / residential	19%
Estimated volume	0.3 million
Average duration	2.4 days
Average size	50 delegates
Average achieved 24 hour delegate rate	£122
Type of conference	
Corporate	59%
Government	24%
Association	13%
Estimated value	£7.3 billion

Source: British Tourism Authority, 2002.

1.12 – Research structure

This research comprises of eight chapters. Chapter Two examines lifecycle models identifying that such models can be used to explain the development and decline of U.K. destinations. Chapter Three integrates the concept of the destination life cycle and conference tourism. The aim is to develop the argument that the evolution of the conference sector is an ideal solution for the post-stagnation phase of destination evolution. Once conference tourism has been introduced to the declining destination, it needs to continually redevelop itself to perpetually grow in order to offset any future decline.

Chapter Four discusses the general characteristics of the four venue classifications that comprise the U.K. conference sector. These distinct venue classifications are used within this research. It also highlights the need to both update and modernise venues in order to maintain a competitive advantage as a conference destination and as a nation. Chapter Five introduces the theoretical concepts of service quality and identifies that venue selection criteria is a fundamental aspect within service quality. Chapter Five also identifies the role of refurbishments as a means of achieving service quality.

Overall, Chapters Two to Five inclusive establish a theoretical framework upon which the studying of the U.K. conference sector will be undertaken..

Chapter Six details the methodology used within this research, whilst also detailing the survey population and response rates as well as identifying methods of statistical analysis. Chapter Seven details the results of the postal questionnaire regarding the research aim, objectives and hypotheses, identifying whether each of the hypotheses can be accepted or rejected, along with satisfying the research objectives in order to answer the overall research aim. Chapter Eight details the conclusions and findings of this research while proposes recommendations for future growth within the U.K. conference sector.

1.13 – A summary of Chapter One

Chapter One has identified the research aim, objectives and hypotheses and has provided the rationale for undertaking such research. In doing so this chapter has highlighted problems faced by researchers within the conference sector, namely the collection of data is inconsistent due to the fragmented nature of the sector. This results in a lack of coherent and accurate data that can be utilised by academic researchers, which in turn has resulted in a limited supply of academic research, particularly prior 1980. In light of this fact, Chapter One has also discussed several other disciplines which have been used by researchers in the conference sector. This research aims to build on existing knowledge of the conference sector by collecting and presenting primary data via academic research which can be utilised in future research.

This chapter has also highlighted that data within the conference sector is collected by trade associations who define conferences differently. Indeed this chapter has highlighted that many authors, such as Webster (1974), Rutherford (1990) and Seeking (1996), along with the British Tourism Authority (2000) all offer conference sector definitions that differ from one another. Although a wide range of authors have played an important part in the evolution and formation of various definitions of the conference sector, a clear set of universally accepted definitions for research in this area is required. It is clear that with so many varying definitions, an official organisation or an official 'voice' to enforce standards and promote a recognised definition for the conference sector status is required. However, to date, no global definition has materialised and independent definitions are still used from country to country. This research aims to provide a consistent set of definitions and classifications for venue classifications that can be utilised within future research.

Finally, the U.K. conference sector has been outlined to provide an introduction to the central topic of this research. In doing so it has been identified that the U.K. conference sector at the start of the current decade is competitive, crowded and seeking the means to differentiate venues.

CHAPTER TWO – THE RISE AND FALL OF DESTINATION POPULARITY

2.1 – Introduction

Some researchers have suggested that tourism destinations move through a continuum (Christaller 1933; Plog 1973; Butler 1980), a process of birth, growth, maturity and finally decline or rejuvenation which together are embodied in the concept of the destination lifecycle (Weaver & Opperman, 2000). In response to Objective Five and Hypothesis Five of this research, that of testing to identify whether a lifecycle model can be used to test and explain the development of the U.K. conference sector, the aim of this chapter is to examine the concept and theories of lifecycles, particularly within the tourism domain, by discussing a number of lifecycle models. Such models will in later chapters be applied to the empirical finding of the U.K. conference sector, and thus providing a theoretical framework for Hypothesis and Objectives One to Four inclusive. In doing so, these models will be used to provide clarity with respect to the temporal development of both the conference sector and the differing venue classifications within the conference sector. In order to gain a firm understanding of the applicability of these models to the U.K. conference sector, this chapter provides a detailed critique of the models concepts, assumptions and criticisms. This chapter introduces the concepts of Vernon's product lifecycle and Christaller's view of a destination passing through a lifecycle. However, this critique focuses on two of the most widely cited resort lifecycle models used within the tourism domain, that of Plog (1973) and the subsequent model presented by Butler (1980), which both highlight the stages through which a destination passes.

Once this detailed critique is provide, this chapter discusses how conference tourism could be used as a planning strategy to rejuvenate and re-orientate a stagnating destination. The view that the evolution of a conference sector may be an ideal solution for a destination entering the post-stagnation stage of the lifecycle model will be explored. Once conference tourism has been introduced to a declining destination, it needs to continually redevelop and evolve itself to offset any future decline. The rejuvenation of the destination through the introduction of and restructuring towards conference facilities is a key aspect of this research.

2.2 – Lifecycle models

Lifecycle models have been documented across many academic disciplines since the 1960s and as such there are many different interpretations of a 'lifecycle'. The most famous lifecycle model relating to business concepts is that of Raymond Vernon's product lifecycle theory, which demonstrated how new products evolve from inception through growth, maturity and decline over time in the U.S. (Vernon, 1966; Cooper & Jackson, 1989).

In his model, Vernon saw the first phase as the new product stage, with no international trade the product is only produced and consumed within the U.S. In the second stage, the maturing product stage, economies of scale are developed and the production process standardised, while demand for the good grows amongst other countries outside the U.S. and the good is exported. Eventually other countries begin to produce the same product and U.S. exports fall. If the labour costs in other countries are lower, then foreign firms are able to offer the same product at a lower price and the U.S. begins to import the product from overseas. The standardised product stage is the final stage in the cycle. In this stage the product is very familiar to both the consumer and the producer. By now production may have shifted to developing countries with lower labour costs. The U.S. now uses its labour to create new products which are only traded in the U.S. and the lifecycle commences for the new product. As new products are created so demand for existing products reduces (Vernon, 1966). Although describing how a product moves from inception to decline, Vernon's models shows that as cheaper substitutes are manufactured overseas, so resources are used to initiate a new lifecycle through the creation of new products within the U.S. The assumption is that the lifecycle of the original product is not rejuvenated within the U.S., but rather declines until the product is no longer manufactured in the U.S. Therefore the Vernon's lifecycle model offers no opportunity to rejuvenate the original product and decline is guaranteed.

Christaller (1933) was the first to make reference towards destinations undergoing such a lifecycle. He described how artists first seek out untouched places for inspiration and subject matter, resulting in an artist settlement being created. They are followed by poets who have similar ideals. Overtime more people, such as gourmets, join the artists and poets as the destination becomes fashionable. Tourism infrastructure develops as homes are converted to boarding houses, in order to offer accommodation to the masses that now visit. The original artists leave to find new untouched places to provide inspiration and in doing so initiate a new lifecycle in a different destination. An increasing number of tourists visit, as the destination is promoted, all the while an increasing number of people who seek real recreation stay away as the natural or cultural characteristics that fashioned the destination's original popularity deteriorate or are displaced. Meanwhile this same cycle is occurring at other places Christaller 1933).

Like Vernon's model concerning business concepts, Christaller's view of a destination passing through a lifecycle does not include the option of rejuvenating the original destination and thus by assumption decline is guaranteed for the original destination. Instead Christaller's view focuses on the psychology of the traveller, particularly from a European context (Tooman, 1997). The first to settle were not dependent upon the destinations tourism infrastructure, but merely attracted by the aesthetic qualities the destination offered. Artists and poets who were intellectually curious were the first settlers (Tooman, 1997). It was not until a decade later that the psychology of the traveller was conceptualised into theory, with Stanley Plog's (1973) Allocentric – Psychocentric Model. This model forwarded the view that destinations rise and fall in popularity due to the psychology of travellers.

2.3 – Allocentric / psychocentric theory of tourism (Plog, 1973)

According to Plog (1973), a population with normal distribution, i.e. represented by a bell curve, can be sub-divided into five main types of tourist, the allocentric, near-allocentric, mid-centric, near-psychocentric and psychocentric. Figure 2.1 shows Plog's diagrammatic representation of this distribution, with the x-axis not plotted against time, but rather the x-axis reflecting the five main types of tourist across this bell-shaped normal distribution.

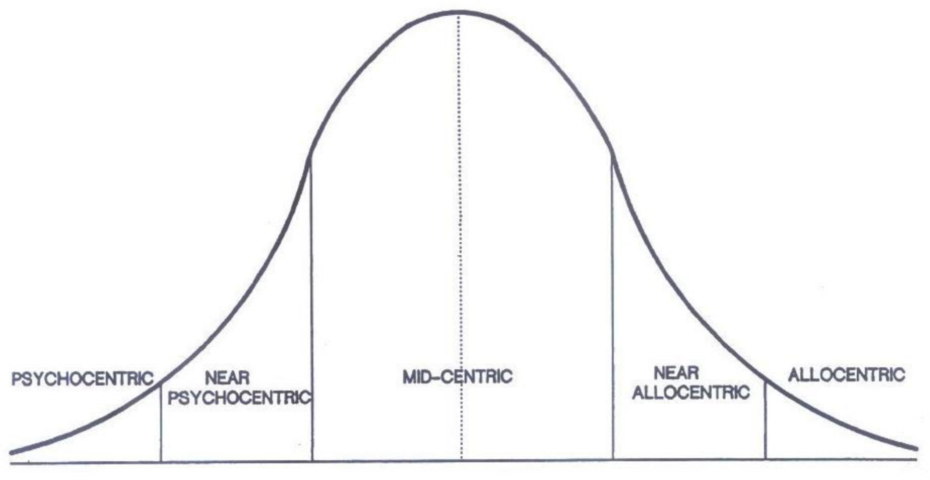


Figure 2.1 – Plog's psychocentric – allocentric classifications
Source : Plog, 1973, p.15

Each of these categorisations is based upon personality dimensions and income levels, ranging from higher income to lower income respectively (Weaver & Oppermann, 2000). Allocentric travellers are the first to visit or discover an area and are intellectually curious, thus supporting the view of Christaller. Allocentric visitors seek both cultural and environmental differences from their own norms, as such are more adventurous and require very little in the way of tourism infrastructure. Individuals are motivated enough to seek new destinations on a continuous basis and rarely return to any one destination. As the destination grows in popularity and its reputation spreads, it attracts near-allocentric, or slightly less adventurous visitors (Plog, 1973).

As tourism infrastructure such as hotels and attractions are developed, mid-centric visitors are attracted to the destination as it is now reasonably accessible, predictable and comfortable. Overtime the destination matures and a full array of amenities, services and attractions are offered, which in turn attracts near-psychocentric and finally psychocentric visitor to the destination. These two groups of travellers do not travel regularly, often stay for relatively short periods and have the lowest financial expenditure within the destination. As the destination grows so it becomes less and less of what original visitors sought. Plog's model supports Christaller's viewpoint, the original (allocentric) visitors leave to discover new destinations and commence a new lifecycle elsewhere. As more and more visitors fail to return to the destination so psychocentric tourists become the majority and the resort declines (Plog, 1973). Plog estimated that about four percent of a normally distributed population are ‘pure’ allocentric and a similar proportion is ‘pure’ psychocentric. Between these polar classifications are the ‘near’ categories, each containing approximately 12%, with the final 68% being midcentric (Plog, 1994).

Due to the conceptual simplicity of Plog’s model, the implications for a destination and its tourist systems can be clearly seen. As the destination moves from attracting allocentric to midcentric and finally psychocentric, so the very fabric that combines to make the destination what it is, must evolve in order to satisfy new demands, whilst trying to satisfy existing demands. Allocentrics demand small local guest houses with little tourism infrastructure, whereas psychocentrics demand national and international chain hotels, restaurants and attractions. Thus the implications for destination planners and managers are clear as the destination moves through the continuum.

Plog’s model is not without its critics. Criticism focuses on the application of the model, including whether or not Plog intended his model to be applied to all age groups, or if it is age specific. Should the model be applied to children, whose personalities are yet to be fully developed? Furthermore, is ‘personality’ a product of nature or nurture, can psychocentrics be transformed into midcentrics through learning and experience. Alternatively do visitors who are allocentric when young slowly move through the continuum over the years until they become psychocentric in old age? Or is it the case that once allocentric always allocentric and once psychocentric always psychocentric? Plog has never published the criteria upon which he based his psychocentric trends due to commercial sensitivity (Weaver & Oppermann, 2000). Therefore researchers are unable to repeat his methodology in order to establish support for or refute the models findings. Criticism of the model also focuses on two implied assertions. The first is that the location of a destination on the curve does not necessarily fit with the number of tourists received, although this relationship is implied by Plog (Opperman, 1997b) and secondly it is assumed that decline is a certainty. As with Vernon’s model and Christaller’s view no option is provided for a destination to rejuvenate. Rather that destinations possessing a competitive edge, such as a favourable climate or higher-grade tourism infrastructure, such as Walt Disney resorts, take longer to pass through the lifecycle and may perpetuate in the mid-centric market (Agarwal, 2002), but ultimately decline is a certainty.

As with Christaller's view, Plog's model focused on the psychology of the traveller and the destinations response as visitors move through a continuum. With its conceptual simplicity and accepting its criticisms, the model is a useful indicator of personal dimensions, but not for predicting tourist behaviour (Weaver & Opperman, 2000). Drawing upon this research and its criticisms, is the destination model that has attracted the most attention and discussion, that of Butler's Resort Lifecycle Model.

2.4 – The resort lifecycle model (Butler, 1980)

Arguably the most influential and most frequently quoted tourism lifecycle model is that of Richard Butler's (1980) Resort Lifecycle Model. Butler adopted the basic principles from Vernon's product lifecycle, as discussed in Section 2.2, which suggests that products go through a number of stages that ends in decline. Butler considered a destination to be a product and thus it too would pass through a number of stages which ultimately ends in decline. In doing so, his model charts the hypothetical temporal development of a destination in terms of a series of stages defined by growth, change, tourist numbers, limits and infrastructure, while bringing together the supply and demand factors (Butler 1980; 2000). These stages are termed exploration, involvement, development, consolidation, stagnation, post-stagnation, which takes the form of decline or rejuvenation. These stages are defines in Table 2.1.

Table 2.1 – The stages of Butler's destination lifecycle model

Lifecycle stage	Characterised by
Exploration	Limited and sporadic visitation by a few adventurous people Relates to Plog's allocentric stage.
Involvement	Defined tourist season created Local community encourages tourism Regular numbers of visitors are attracted to the destination. Relates to Plog's near- allocentric stage.
Development	Outside investment attracted and accessibility enhanced Well defined tourism market emerges Decline in local participation and control Relates to Plog's mid-centric stage.
Consolidation	Major portion of local economy tied to tourism Dominated by major chain and franchises Visitor level still rise, but rate slows Advertising and marketing increases tourism season Relates to Plog's mid-centric stage
Stagnation	Capacity levels reached / exceeded Resulting in economic, social and/or environmental problems Peak number of visitations is reached Artificial attractions supersede natural / cultural attractions Surplus capacity exists Relates to Plog's near-psychocentric stage.
Post-Stagnation Decline	Tourists are attracted away by newer destinations Remainder are weekend / day visitors Tourism facilities replaced by non-tourism establishments as the area disengages from tourism Area becomes a tourist slum or is devoid of tourism altogether Relates to Plog's psychocentric stage
Post-Stagnation Rejuvenation	Dramatic change in the resource based established Either new artificial attraction is developed or unexploited natural resource utilised.

Source: Butler, 1980 cited in Tooman, 1997, p.217

Plog's (1973) Psychocentric – Allocentric model was of great importance for the development of Butler's model for two reasons. First, the demand side of tourism is dynamic and provides a basis for linking the changes in destinations (supply) with changes in visitors (demand). Secondly, because the model was based on both empirical work and statistical analysis, limited though these may appear over three decades later, this was not common place within tourism research at the time the model was published (Butler, 2000).

However, Butler's model differentiated itself from previous models discussed. It introduced a theoretical exit from the lifecycle in order that the destination can rejuvenate itself and commence the lifecycle once more. Therefore during the final stage of the cycle, the destination can either rejuvenate which will initiate a new lifecycle, or continue to decline. Traditionally the destination passes through these stages following an S-shaped curve, as shown in Figure 2.2, with time as the x axis and number of tourists as the y axis.

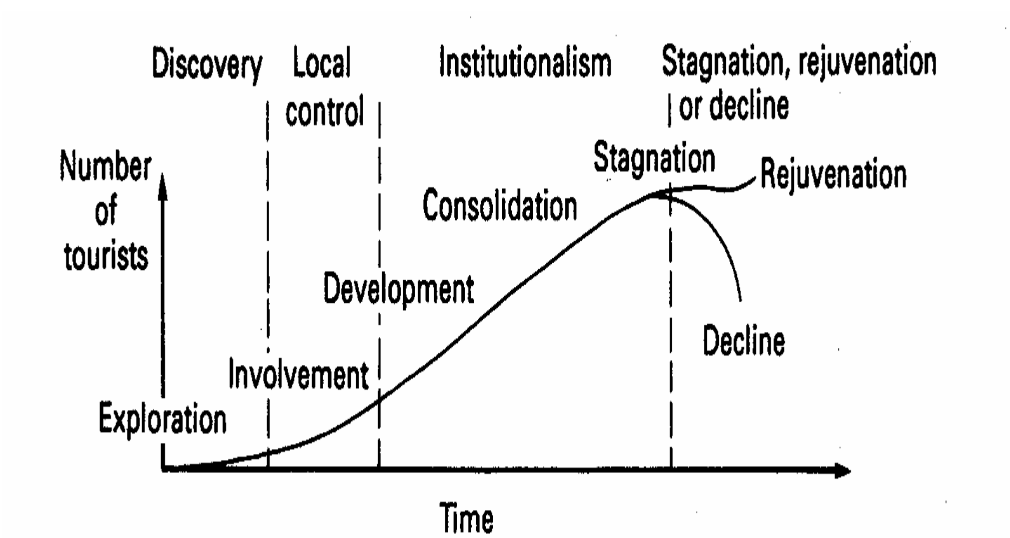


Figure 2.2 – The Butler's resort lifecycle curve

Source: Butler, 1980, p.10

The period of time each destination takes to progress through the various stages of the model differs. Some destinations may take a few hundred years to reach the stagnation stage, whereas others may pass through the stages within a couple of decades (Cooper et al, 1998). The period of time taken to pass through the model is dependent upon factors such as:

- The rate of development
- Access
- Government policy
- Market trends
- and competing destinations (Cooper et al, 1998 p.114).

Individually or as a combination, these factors can delay or accelerate progress through the lifecycle stages. Development can cease at any stage of the model until factors change or new factors are introduced. Therefore, the length of each stage and the time taken from exploration to stagnation varies between destinations. The direction (in terms of either decline or rejuvenate) that the resort takes is more likely to be determined by the interaction of government and the resort management in a response to stagnation. This is a crucial stage for the resort, whether the resort will re-evolve and survive, or perish and decline. Each stage of this model highlights differing capacity thresholds and requires distinct policy responses (Getz, 1992). In addition, during the growth and maturity stages, the management of change is key in order to prevent deterioration or decline. If such decline is experienced, then decisions must be made on whether to rejuvenate the destinations tourism industry and what means, such as incentives, should be used (Getz, ibid). The model is therefore supply-generated focusing on the tourism product, with the advantage of doing so being the embodied challenge for product development, particularly when the Stagnation stage is reached (Lundtorp, 2002).

The model is not without its critics. An initial criticism stems from the identification of each stage's point of inflection. It is recognised that each stage within the model is based on capacity levels and visitor numbers (Debbage, 1990) and that decline is witnessed when visitor numbers exceed the carrying capacity levels of the destination (Cooper & Jackson, 1989). This is only identifiable post-facto (Haywood, 1986; Agarwal, 2002). Thus the model is a hypothetical development path to which empirical findings can be compared. A second criticism is related to this identification of Butler's stages, in particular identifying when a destination passes from stagnation into post-stagnation. Many of the features of stagnation, such as economic, social and environmental problems, a bed capacity surplus, a heavy reliance upon repeat visitation and a poor image, are also key features within the decline stage. However, the model forwards the view that it is within the decline stage that corrective measures are introduced (Butler, 1980). Thus it is only when such corrective measures become apparent that it can be stated a destination has entered the decline stage. However, as the decline stage shares many of its characteristics with the stagnation stage, the destination may have actually been in decline for some time without actually realising it (Hovinen, 2002).

The model has also been criticised for its lack of geographical scale. A destination is a multitude of differing elements (hotels, attractions and retail units) each exhibiting their own lifecycle, each element would in fact progress through its own lifecycle, with some expanding and others contracting at any given moment in time, thus the unit of analysis is crucial (Agarwal, 1994; Cooper & Jackson, 1989; Priestley & Mundat, 1998; Weaver & Oppermann, 2000). The geographical scale employed by this research is at both the conference sector level and at individual venue level. A further criticism of the model has already been discussed in relation to the previous models and that is the certainty of stagnation (Tooman, 1997; Weaver & Oppermann, 2000). The model outlines that a destination must first stagnate before it can rejuvenate, but as stated a destination is comprised of a number of elements each at differing stages of the lifecycle. The rejuvenation in one element as it stagnates may result in the rejuvenation of other elements prior to its own stagnation, an example being the introduction of a conference venue may lead to the refurbishment and rejuvenation of nearby hotels, prior to hotels reaching the stage of decline, as demand for accommodation increases. In suggesting this Agarwal is in effect modifying Butler's initial model. Baum (1998a) also extend Butler's model by suggesting a reinvention stage within the overarching rejuvenation stage. This reinvention subset extends the lifecycle model by permitting a series of exits and re-entries to the model.

Although Butler accepted the role of entrepreneurs within the involvement stage of the lifecycle, Russell & Faulkner (2004) state that entrepreneurial triggers should be given greater acknowledgement. Such stage-changing triggers can either be in a positive or negative direction. For example, if development overwhelms the regulatory mechanisms and the destination infrastructure, waterways may be polluted, the beach quality declines due to overuse and overall the resort's appeal is diminished (Russell & Faulkner, 2004). Alternatively revitalising entrepreneurship occurs as a destination reaches a stage of maturity or stagnation. The community implements strategies to attract vibrant entrepreneurs who have the vision, the drive and the financial resources to revolutionise the destination (Warnken, Russell & Faulkner, 2003). In ignoring the role of the entrepreneur in the latter stages of the cycle, Russell & Faulkner (2004) also criticise Butler's model for its quasi-linear representation of a destinations lifecycle, preferring instead to suggest that combining a destinations lifecycle with entrepreneurial triggers results in a cyclical representation of the lifecycle model, as shown in Figure 2.3.

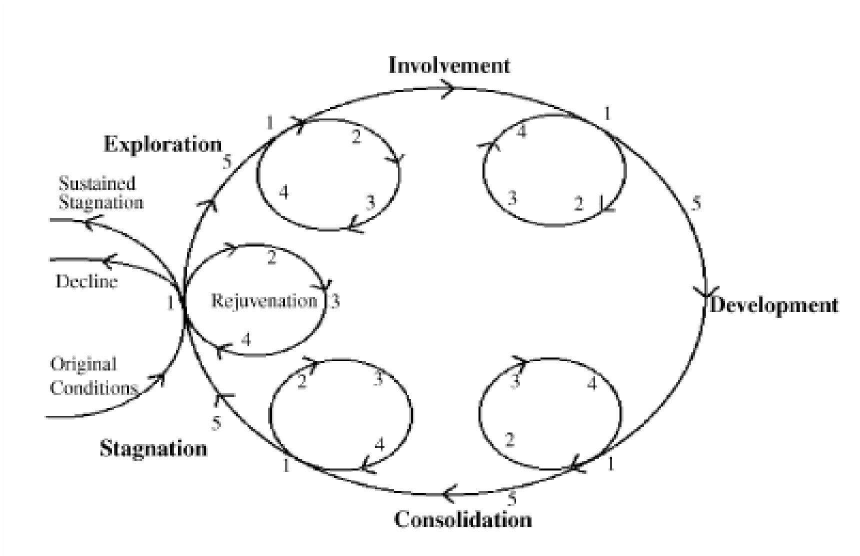


Figure 2.3 – A cyclical representation of butler's lifecycle model
with entrepreneurial triggers
Source: Russell & Faulkner, 2004, p.563

Figure 2.3 shows a representation of triggering mechanisms within each stage of the model and subsequent cycles of change within the evolution of the destination. The destination moves through the exploration stage as visitors are first attracted to the destination. Visitors have limited demands upon the destination, which in response supply facilities that can satisfy this limited demand i.e. artists demanding unspoilt subject matter. The destination then moves to a point of disequilibrium (point 1), for instance where visitor demands cannot be supplied by the destination. The destination then moves into a period of continued disequilibrium (point 2) until entrepreneurs create and supply corrective measures, (point 3), when the destination enters a new phase that reflects the old and continues in a state of equilibrium as it passes into the next of Butler's stages. Russell & Faulkner (2004) therefore suggest that the overall lifecycle model is indeed a succession of small lifecycles as the destination moves forward in response to entrepreneurial activity.

Drawing together the criticisms of Butler's model (Prosser, 1995 cited in Butler, 2000. p.292) identified five central themes;

- Doubts on there being a single model of development
- Limitations on capacity issues
- Conceptual limitations of the lifecycle model
- Lack of empirical support for the concept
- Limited practical utility of the model

Although the resort lifecycle model is not without its criticisms, a number of empirical studies have been undertaken to apply it to case studies. Although such studies broadly conform to the model, there is a lack of consensus within empirical findings as most applications have identified at least one aspect where the model does not fit the case study (Weaver & Oppermann, 2000; Hovinen, 2002).

In a study of Atlantic City the first two stages of the lifecycle were skipped as it was developed explicitly to emulate Cape May, an established tourist resort South of Atlantic City, U.S. However, the latter four stages are distinguishable, particularly as the destination entered the decline stage during the 1970s just as gambling was introduced to rejuvenate the destination (Stansfield, 1978). Indeed

Butler accepted that the involvement stage could be omitted due to the 'instant resort' phenomena such as Atlantic City (Butler, 1980). Additional empirical research of the Cayman Islands shows that local involvement increased as development increased, going against Butler's definition of the development stage. However, this increased local involvement was due to external factors including government policy and limitations on growth, which created a stable, longer maturity stage (Weaver, 1990).

External factors, rather than a decline in the destination, were also responsible for the decline of Lancaster City, Pennsylvania U.S. after 1978. These factors were the outbreak of polio in the local Amish community, the Three Mile Island accident nearby and the second oil shock of the decade (Hovinen, 1981). In contrast an examination of Niagara Falls found that the destination has evolved into what is considered to be a permanent state of maturity. Due its unique natural beauty combined with planning and control as problems arise, enables consolidation, stagnation, decline and rejuvenation to all coexist within the destination (Getz, 1992). In a study of the Isle of Man (U.K.) research found that it had reached the stagnation stage as far back as 1918 and had been struggling to rejuvenate itself ever since (Cooper & Jackson, 1989). Thus an exit strategy was proposed in order that the island refocused itself away from tourism entirely (Baum, 1998).

Since Butler first issued his model back in 1980, his theory has been applied to over 50 destinations (Weaver & Oppermann, 2000). There is not sufficient time or space to detail all empirical studies, further findings of the models applicability can be seen in the works of Douglas (1997), Tooman (1997), Priestley & Mundet (1998) and Hovinen (2002). It can be seen from this brief look at empirical research concerning the lifecycle model, that there is little consistency between findings, However, rejuvenation does feature in many of the empirical studies cited (Atlantic City, Niagara Falls and Isle of Man).

This post-stagnation stage is critical for any tourist destination's continual development. To prevent decline, rejuvenation will require a change in the attractions upon which tourism is based. Such changes include the re-orientation of the destination within the overall tourism market or environmental enhancements, for example the introduction of gambling in Atlantic City (Priestley & Mundet, 1998; Agarwal, 2002). The tourism lifecycle can be both extended and revitalised as a "result of conscious, deliberate decision-making on the part of management, this is referred to as a strategic lifecycle extension" (di Benedetto & Bojenic, 1993, p560). There have been relatively few empirical studies focusing specifically on this advanced stage of Butler's model, where rejuvenation may occur (Priestley & Mundet, 1998; Knowles & Curtis, 1999), as such "little is known about the role of restructuring [within the models advanced stages] or about the ways in which restructuring may be achieved" (Agarwal, 1994 p207).

It is this rejuvenation of the destination through the introduction of and restructuring towards conference facilities that this research is concerned with, such restructuring through the introduction of conference facilities has been witnessed in many coastal resorts of the U.K.

2.5 – Restructuring U.K. coastal resorts

One of the criticisms of Butler's model was that the differing stages cannot be identified until post-facto (Haywood 1986; Agarwal 2002). This is particularly the case for the exploration stage, however, Butler described this stage as being characterised by the destination receiving relatively few tourists, which for Bournemouth, was as early as the 1840s, when coastal resort vacations became fashionable (Soane, 1993). This compares to the resort of Scarborough which entered the lifecycle model over 300 years ago, suggesting the exploration stage took place in the 1700s (Cooper et al, 1998), when Scarborough was visited by a small number of tourists. Such resorts were planned and developed during the prosperous Victorian era when grand public architecture and town planning were at their peak (Knowles & Curtis, 1999). By the 1860s, Bournemouth entered the involvement stage, as it had experienced rapid expansion and prime villa sites were in short supply, as it became a popular resort due to being relatively close to London (Soane, 1993).

By the 1920s British coastal resorts entered the development stage as they were no longer seen as destinations only for aristocracy and royalty. "By the development stage, large numbers of visitors are attracted" (Cooper et al, 1998 p.115) and the image of the U.K. coastal resorts had changed. Such resort now attracted the working class masses from industrial towns (Knowles & Curtis, 1999). By 1933 coach holidays for the working class were commonplace from industrial towns in the North of England, such as Lancaster and by 1935, 799 coaches operating from 190 towns in England visited Bournemouth (Bournemouth Echo 3/4/1936, 7/4/1936 cited in Soane, 1993).

The consolidation stage of these resorts lasted from the 1930s to the 1960s, as access by car became more frequent and annual holiday leave was generally extended (Knowles & Curtis, 1999). The destination became part of the tourist industry and although growth in visitor numbers reduces, at this stage the number of visitors often exceeds the number of permanent residents. However, major changes in the U.K. domestic tourism industry occurred after the Second World War.

Overall "the concept provides a useful framework for research that seeks to enhance understanding of development processes and there implications" (Prosser 1995 cited in Hovinen, 2002 p.13). It is also viewed that "the true value of the lifecycle lies in the insights it can provide into the influences upon and decisions taken about, the product at different stages in the lifecycle" (Cooper, 1992 p.146). The model is also credited with "providing an analytical framework to examine the evolution of tourist destinations within their complex economic, social and cultural environments" (Cooper & Jackson, 1989 p.382) and that "The Butler's lifecycle at best can assist general trend prediction rather than causal forecasts…….The lifecycle approach has therefore much to offer tourism researchers. Its logical and intuitive appeal deserves greater attention among tourism researchers, who should not be swayed by those who criticise the lifecycle for its lack of operational value. By regarding destinations as dependent upon the actions of managers, the tourist industry and their markets, the lifecycle provides an integrating medium for the study of tourism, a promising vehicle for future research and a frame of reference for emergent themes in tourism such as sustainable tourism" (Cooper, 1992 p.156-157).

2.5.1 – Causes and consequences of resort decline

The technological advances in aviation made during the Second World War were applied to civilian aircraft, such as greater energy efficiency, faster aircraft with greater capacities. As such civilian aircrafts could move more people, over greater distances, quicker (Cooper et al 1998). Combining these technological advancements with the establishment of tour operators, such as Thomas Cook, resulted in the emergence of tourism as a "modern, large-scale industry" (Weaver & Oppermann, 2000, p.64). Such increases in mass travel and tourism resulted in price reductions, making tourism resorts affordable to those with lower levels of disposable income. In turn, many travellers preferred the newly available European destinations to domestic resorts which they traditionally visited, as these European destinations could offer lower prices due to favourable exchange rates and cheaper labour (Agarwal, 2002). "As a result, tourists were given three star quality at prices that would hardly pay for a guest house in their own countries….This further encouraged the growth in the overseas market at the expense of the domestic market, especially in Britain" (Morgan, 1994 p.381). Travel was no longer a luxury for the elite and as such this was the beginning of international mass travel. U.K. coastal resorts began to stagnate as domestic tourists chose overseas destinations and by the mid 1960s they offered traditional family holidays and little else (Agarwal, 2002).

During the 1960s, the standard of hotel accommodation in Bournemouth for example began to gradually decline and four star hotels continued to close (Soane, 1993). Within resorts such as the Isle of Man, issues of an over provision of small hotels, with large family sized rooms lacking en-suite bathrooms, lifts and toilets and the provision of small family businesses that dominate the guest house venue type became apparent in the Isle of Man. Many of which could not afford to invest in modernisation, due to the high degree of seasonality affecting profitability, instead they chose to change their use from accommodation to residential or other business use as confidence in tourism diminished (Cooper & Jackson, 1989).

There are also a number of additional problems faced by cold water resorts, that of "an eroding share and volume of the tourist market, low status, low-quality tourism, a high degree of seasonality, particularly during the months of July and August; a poor standard of tourist infrastructure; short term planning, inadequate financial and human resources and local opposition to change" (Cooper, 1992 p.153).

In studying the applicability of Butler's model, Agarwal (1997) clearly identified characteristics of the decline stage within the resort of Torbay, on the South coast of Britain. At the end of the 1960s, based upon the literature review undertaken, it was widely recognised and accepted that resort decline was endemic within U.K. coastal resorts and that the U.K. tourist industry needed to be rejuvenated (Agarwal 2002). Demand-side factors linked to the changing travel patterns and shifting demographics had occurred along-side supply side factors, such as a reduction in the quality of hotel stock and conversion of bed-space to residential homes for the elderly (Cooper 1990; 1997).

2.5.2 – Responses to decline within U.K. coastal resorts

The implementation of corrective action in order to address decline is an essential characteristic of the resort lifecycle's post-stagnation phase (Butler, 1980). The requirement to understand the processes involved in corrective action of restructuring stem from "the social and economic structure of any given area will be a complex result of the combination of *that area's succession of roles* within the series of wider national and international spatial divisions of labour" (Massey, 1978 p.116) (author's emphasis). This creates a "uniqueness" of place, which is a product of cultural, political and ideological factors that influence political strategies and investment decisions adopted by a destination (Agarwal, 2002).

U.K. based empirical research into the extent and nature of restructuring is confined to a limited number of resorts, including Torbay, Bournemouth, Brighton and Bognor Regis (Turner, 1993; Agarwal, 1997, 1999; Knowles & Curtis, 1999). These studies have highlighted that the action of rejuvenating through restructuring resorts differs between destinations. The ability to restructure a destination within the U.K. was instigated under the Development of the Tourism Act (1969).

Part I of the Development of Tourism Act 1969 established the tourist authorities and the tourist boards for the U.K., whereas part II of the Act provided financial assistance for hotel development in the form of 'Hotel Development Grants.' Grants were provided for the provision of new hotels, for extensions or alterations to existing hotels and for the provision of certain fixed equipment. The Act enabled hoteliers to reinvest in their hotels, in the form of grants to upgrade their existing facilities (Development of Tourism Act 1969, chapter 51, part one & two). This enabled the U.K. hotel sector to renovate the existing facilities in order to enter the rejuvenation stage. Additionally, between 1985 and 1995 Tourism Development Action Programmes were undertaken in an attempt to restructure resorts, such as Bridlington, Torbay and Weston-Super-Mare, as a whole. Such efforts centred primarily on the reorganisation and transformation of the tourist product (Agarwal, 2002), as shown in Table 2.2. Under the category of diversification it can be seen that business and conference tourism were developed in resorts such as Torbay, Bournemouth and Brighton.

Table 2.2 – Coastal resort restructuring

Forms & Strategies	
Product Reorganisation	
Investment & Technical Change	Introduction of a ten-pin bowling complex at Torbay (Agarwal, 1997)
Centralisation	The formation of COAST, a marketing alliance between some southern England seaside resorts including Torbay and Bournemouth
Product Transformation	
Environmental quality enhancements	Restoration of historic buildings has occurred in many some southern England seaside resorts including Bognor Regis, Ramsgate and Ilfracombe (Turner, 1993)
Repositioning	The re-alignment and strengthening of the resort image in Torbay and Weston-Super-Mare away from mass tourism low spend tourist and toward high-spend special interest visitors.
Diversification	The development of previously untapped natural, cultural and built resource to attract new markets such as business and conference tourism and domestic short breaks is being encouraged in Torbay (Agarwal, 1997) and in Bournemouth and Brighton (Knowles & Curtis, 1999)
Collaboration	The initiation of joint public / private sector ventures, such as Tourism Development Action Programs in some English seaside resorts (for example Bridlington, Torbay and Weston-Super-Mare) to encourage tourism development

Source: Agarwal, 2002, p.53

2.6 – The use of conference tourism to rejuvenate U.K. destinations

Once a destination has passed from the stagnation stage, destination managers may decide to rejuvenate a destination by looking at new markets, however, they should seek to protect the destination's traditional markets (Cooper et al, 1998). From Table 2.2 Agarwal (2002) identified that the introduction of a conference centre is a means by which a destination aims to diversify. As such, resorts should identify new markets that are both geographically and behaviourally segmented, thus reducing their dependence upon a single market. In order to identify and attract these new markets, changes will be required in the marketing mix. For example, the product offered, in terms of accommodation, attractions and prices charged, may not meet the needs of the new market and new distribution channels may be required (Morgan, 1994). In doing so the creation of a conference centre also acts as a tool to revitalise the destinations urban image. Often the aim of revitalisation is to construct a conference venue as the centrepiece for creating the image of a vibrant urban centre, which will improve the social conditions of the local community, such as creating employment opportunities. Overall, revitalisation stimulates economic growth (Business Tourism Partnership, 2003; Dwyer & Forsyth, 1997; Fenich, 1992; Go, Govers, & Vliegenthart, 2002).

It was therefore important to create and implement a sustainable strategic tourism plan, designed to protect the resorts traditional markets, whilst testing markets in selected emergent sectors. During the 1970s, as the resort of Bournemouth entered the decline stage of its lifecycle, Bournemouth Council realised the traditional leisure product could not be sustained and the Local Authority accepted that the town needed a "degree of economic diversification which complemented, rather than detracted from, the existing qualities of the resort" (Soane, 1993 p.271). It was planned that any strategy introduced would, for Bournemouth, provide the foundations to modernise existing hotels and the construction of a purpose-built conference centre. As part of this strategic planning, Bournemouth's Local Authority invested £25million in building the Bournemouth International Conference (BIC) centre (Morgan, 1994). Hotel owners, identifying that Bournemouth was re-orientating itself away from a single 'product' of mass tourism, towards a mixture of both mass and conference tourism, took advantage of the funding available under the Development of Tourism Act (1969). Many began to introduce facilities demanded by conference delegates, such as en suite bathrooms, with the benefits being witnessed mainly, though not entirely, by larger business–orientated hotels (Morgan, 1994). This conference centre has revived Bournemouth as a destination generating economic benefits for local businesses in excess of £50 million per year (Bournemouth Borough Council, online, 2003).

The success of Bournemouth regenerating itself into a conference destination has also stimulated other declining tourist destinations to follow suit. For example Llandudno was rejuvenated by constructing the North Wales Conference Centre in 1994, at a cost of £6,000,000 (Cooper et al, 1998). Blackpool has focused on the conference industry and is continually trying to reinvent itself, although still maintaining traditional events such as the town's illuminations, which continue to attract larger numbers of visitors. In 2002, Blackpool Borough Council unveiled a £1 billion initiative to establish the town as a spectacular, world-class resort for the 21st century – creating more than 20,000 jobs and initiating a major programme of regeneration. These ambitious proposals outlined in a draft master-plan covering a 200-hectare site at the centre of the resort. This could take 15-20 years to be fully developed, with the plans include a major new entertainment complex, up to four casino hotels and a new conference / arena facility (Blackpool Borough Council, online, 2003).

Edinburgh ICC was built in a blighted area, the aim was also to 'bring business life to Edinburgh's traditionally bleak winter months between November and March' (Tarpey, 1996 p.64). "In a sense, conference facilities contribute to a structure supporting both business and cultural community activities and have become an important element of city life across the world (Go, Govers, & Vliegenthart, ibid p.46).

It is clear that many U.K. destinations have restructured their tourism product to include the conference sector as the destination enters the decline stage. In essence, as the destination enters the decline stage, it is important to modify its brand positioning, as well as its target market. The destination should implement strategies rather than temporary cosmetic fixes (Knowles & Curtis, 1999), with the overarching strategy to change the tourism product over time in order to eliminate stagnation of the destination or tourism product. Further discussion relating to the economic, social and environmental consequences of establishing conference venues are discussed in Section 3.3.

2.7 – Summary of Chapter Two

This chapter has highlighted research regarding the process through which products pass, a process of birth, growth, maturity and decline which is termed a lifecycle. There are many different types of lifecycle, ranging from Vernon's (1966) Product Lifecycle model within business concepts, Christaller's (1933) view of a destinations development and decline, Plog's (1973) Allocentric – Psychocentric model and Butler's (1980) Resort Lifecycle Model. The latter three models which are widely used in the tourism domain. Common to Christaller's view and Plog's model is the assumption that decline is a certainty, although some destinations may take longer than others to pass through the continuum, decline remains an inevitable. There is no theoretical option for a destination to rejuvenate or to return to a stage within the lifecycle that it had previously passed through.

Butler's Resort Lifecycle Model (1980) is credited with "providing an analytical framework to examine the evolution of tourist destinations within their complex economic, social and cultural environments" (Cooper & Jackson, 1989 p.382). This model utilises Vernon's Product Lifecycle model, viewing destinations as products themselves and it is Butler's model that introduces the theoretical option of rejuvenation as the destination (or product) declines.

This rejuvenation is seen as diversification, restructuring or re-orientating the destination within the overall tourism market, as the destination develops a succession of roles. In doing so, the tourism lifecycle can be both extended and revitalised as a "result of conscious, deliberate decision-making on the part of management, or "strategic lifecycle extension" (di Benedetto & Bojenic, 1993, p560). Such deliberate decision-making has been witnessed in many U.K. destinations through the introduction of conference and business tourism to combat the decline in U.K. coastal resorts which occurred through the 1960s and 1970s, such as Torbay (Agarwal, 1997), Bournemouth and Brighton (Knowles & Curtis, 1999).

As stated, Butler conceptualises that a destination can be considered as a product and this research supports this view by considering both the U.K. conference sector and venues within the sector as products. Empirical research has identified that the construction of a purpose-built venue has revived Bournemouth as a destination, generating economic benefits for the local economy in excess of £50 million per year (Bournemouth Borough Council, 2003). As such, it is proposed within this research that the process of passing through a lifecycle from inception until stagnation can be applied to both the U.K. conference sector and its venues. The subsequent possibility that the product, be it the conference sector as a whole or individual venues, has the theoretical option of decline or rejuvenation is fundamental to both Butler's model and this research. Chapter Seven within this research shall present empirical findings in support of this view. Additionally, the extension of Butler's model by Russell & Faulkner (2004) is of interest to this research. The extension of the destination model from a quasi-linear representation to that of a cyclical model is applied to the overall U.K. conference sector.

CHAPTER THREE – REASONS FOR ESTABLISHING A CONFERENCE SECTOR IN A DESTINATION

3.1 – Introduction

This chapter shall discuss the costs and benefits of establishing a conference venue within a destination. It is accepted that establishing such a venue will create costs and benefits not only for the destination, but for the nation as a whole, through, for instance the generation of foreign exchange earnings (Fenich, 1997; Knowles & Curtis 1999; Go, Govers, & Vliegenthart, 2002). However, as this chapter is focuses on the use of a conference venue as a tool for rejuvenation, discussion will be limited to the costs and benefits incurred and/or accrued by a destination in response to the conceptual characteristics of a destination stagnating or declining, as forwarded by Butler (1980), as identified and discussed in chapter two. Conclusions are drawn concerning which economic, social and environmental consequences are addressed by the introduction of such conference facilities.

3.2 – The economic, social and environmental consequences of a conference venue within a destination

The majority of research carried out on the impacts of the conference sector comes from Australia and the U.S. The principal authors from Australia are Dwyer & Forsyth (1997), Mistilis & Dwyer (1999), Dwyer et al (2000) and McCabe et al (2000). The predominant author from the U.S. is Fenich (1992, 1994, 1995, 1997 and 1998) who has written numerous articles about the economic impacts and benefits of conference development. Fenich identifies many advantages and disadvantages associated with the presence of a conference venue. The works of Forsyth & Dwyer (1997) and Fenich (1992) have been adapted, to focus on the economic, social and environmental consequences of introducing a conference venue within a destination, these are shown in Table 3.1.

Table 3.1 – The economic, social and environmental consequences of introducing a conference venue

	Advantages	Disadvantages
Economic Impacts	Public / private investment collaboration in tourism and recreation infrastructure Contribution to employment and income Stabilisation of tourist flows	High costs involved Sphere of influence small Increased competition
Social Impacts	Improved destination image Increase number of local attraction for use by locals	Resident attitudes remains negative
Environmental Impacts	Revitalisation of blighted area	Carrying capacity exceeded

Source: Adapted from Dwyer & Forsyth (1997 p. 21-22); Fenich, (1992, p.194)

By classifying Forsyth & Dwyer (1997) and Fenich (1992) consequences of introducing a conference venue into economic, social and environmental, as seen in Table 3.1, a direct comparison can be made between them and the economic, social or environmental consequences of entering Butler's decline stage. These factors can be seen both through the establishment of a conference venue and its operation.

3.3 – The economic, social and environmental consequences of establishing a conference venue

Investment in establishing a conference sector has in many instances supported improvements in the destinations environment, through the revitalisation of blighted areas which have been created through the decline of a destination. Tooman (1997) suggested that as a destination declines so it becomes a tourist slum, or becomes devoid of any tourism activity. As stated in Section 2.6, often the aim of such revitalisation is to use the conference venue as the centrepiece for creating the image of a vibrant urban centre, which will improve the social conditions of the local community, such as creating employment opportunities. Overall, revitalisation stimulates economic growth (Dwyer & Forsyth, 1997; Fenich, 1992).

This has been seen in both coastal resorts and inner city areas of the U.K., as experienced by Bournemouth, Birmingham, Belfast, Brighton, Cardiff, Glasgow, Harrogate and Manchester (Business Tourism Partnership, online, 2003). An example of regional regeneration can be seen in Bournemouth, which has been discussed in Section 2.6. Additionally, as Birmingham progressed through the latter stages of its lifecycle it experienced high unemployment and blighted areas through the decline of its manufacturing industry. In response to entering the stagnation phase of its lifecycle, Birmingham's International Convention Centre (ICC) was built to regenerate the region by acting as a catalyst for growth within the regions retail, hotel and leisure sectors. As a result it generated £1.5 billion of public and private investment within the city, as well as attracting 1.5 million people to the city in its opening year, including 120,000 delegates attending more than 360 conferences and seminars (Bowie, 1991). As well as this public and private investment within the region, the Birmingham's National Exhibition Centre (NEC) venue has generated more than £711 million in visitor expenditure per annum. Birmingham has pioneered the use of conference venues to regenerate its city, it now has 70 conference hotels (Waight, 2002). The overall effect of developing the ICC was the rejuvenation of the region, which rejuvenated the destinations' lifecycle.

As a destination replaces its tourism infrastructure with non-tourism infrastructure during the decline stage of the destinations lifecycle, the development of a major conference centre can reverse this process. The construction of a conference venue spurs additional capital improvements through public and private collaboration, including the upgrading and re-establishment of accommodation stock, as well as the construction and renovations of restaurants, retail units and entertainment facilities (Nelson, 1996). "The development of a variety of cultural, educational and conference facilities often results in the augmentation of productivity at the local level" (Go, Govers, & Vliegenthart, 2002 p.46). Additionally, these benefits filter down throughout society quicker than they do for most other industries (Law, 1993). The result of which is that "communities are willing to subsidise construction and operation of conference centres" (Nelson, 1996, p.145), because these additional retail, entertainment and food outlets are available for the local community to use. Furthermore, the overall economic development which is stimulated by conference activity will lead to greater income levels for and higher demands from the host population. This will not only increase taxation revenue available for local investment, but also make local investments more attractive by generating higher levels of local demand for general consumption, particularly for consumer durables. This is seen as a cascading effect of expenditure (Rogers, 2003).

3.4 – The economic, social and environmental consequences of operating a conference venue

Once developed, the conference sector within a destination is able to attract delegates. Business tourism generates over £15 billion annually for the U.K. of which £4 billion is inbound and £11 billion is from domestic business tourism. This represents 29% of all inbound tourism visits and 32% of inbound expenditures (Office for National Statistics International Passenger Survey, 2000). Within this overall £15 billion business tourism market, conferences accounted for £7.3 billion in 2001 (British Tourist Authority, 2002). No other tourism sector generates as much revenue as the conference sector and the economic prosperity it generates for a destination is indisputable (Greaves, 1998a). It contributes substantial revenue to a local destination and it is for this reason that destinations may restructure their tourism plans by introducing conference facilities. By introducing a conference venue, the primary means of the destination obtaining the financial resources to rejuvenate its lifecycle is through delegate expenditure during the time spent in the destination, this expenditure stems from delegate numbers.

Figure 3.1 demonstrates the growth of inbound business tourists to the U.K. showing a growth from 23.7% in 1993 to 29% in 2000 (Office for National Statistics International Passenger Survey, 2000).

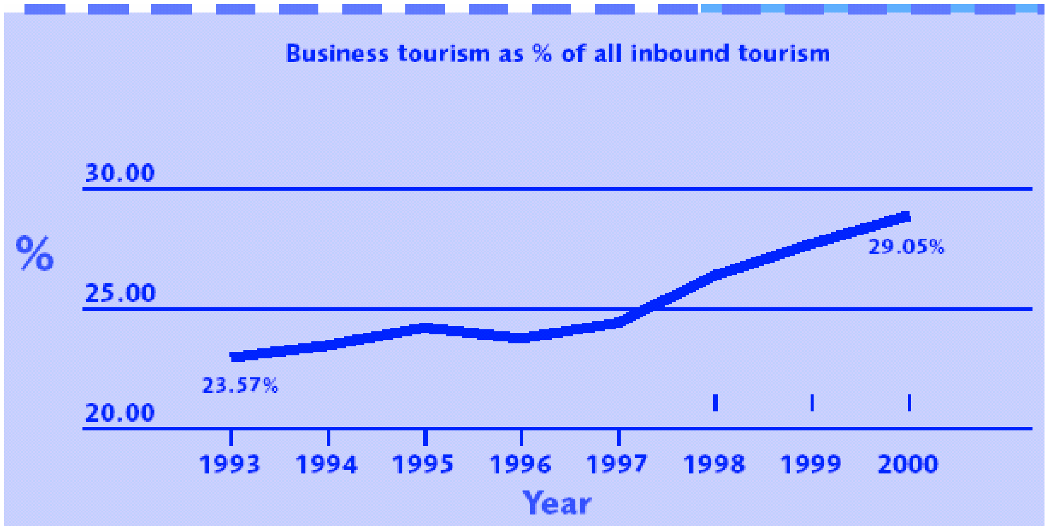


Figure 3.1 – Business tourism as a percentage of all inbound tourism
Source: Office for National Statistics International Passenger Survey, 2000, p.33

Although business tourism visitor numbers have increased, in general there has been a shortening of conference durations in favour of single day conferences (British Tourist Authority, 1998). The average conference duration within the U.K. is 1.4 days (British Tourist Authority, 2002). Although the British Conference Market Trends Survey (2002) identified that the length of corporate meetings decreased from 1.7 days in 1999 to 1.3 days in 2001. Furthermore the average length of an association meeting declined from 2.2 days in 1998 to 1.8 days in 2001 (British Tourist Authority, 2002).

In Table 2.1 it was identified that a characteristic of Butler's (1980) decline stage is the increase in day visitors, thus by implication a reduction in overnight visitors is a characteristic of the decline stage within a destinations lifecycle. However, more one-day conferences create the potential for a destination to host a greater number of events. This creates pressure for both the venue to attract more events and for accommodation providers to be able to provide accommodation for only one-night, creating a greater turnaround of conference delegates on a day-to-day basis.

Although a decrease in overnight visitors is a characteristic of the decline stage, however, conference delegates often remain in the conference destination beyond the closure of the conference and are often accompanied by their spouse and/or family In Orlando, U.S.A, a survey of conference delegates between 1989 and 1992 highlighted that such delegates spent an additional 2.08 days in the host destination (Braun, 1992). Furthermore, approximately 70% of delegates travelled with their spouse and/or family (Meeting & Conventions, 1988 cited in Braun, 1992). In remaining in the destination for additional periods the conference sector is also encouraging the use of the destination's tourism infrastructure for cultural and economic exchange (Kulendran & Wilson, 2000a).

The generation of revenue and employment opportunities is the single most effective way that the establishment of a conference venue can rejuvenate a declining destination. For each day that a delegate remains in a U.K. destination they spend in excess of £100, with a further £100-£200 channelled into accommodation, an average of £30 is spent on meals and £16 on shopping and gifts in the host community (Greaves, 1998a; Business Tourism Partnership, online, 2003). Figure 3.2 represents the average spend per day of conference delegates compared to business tourists and the total market.

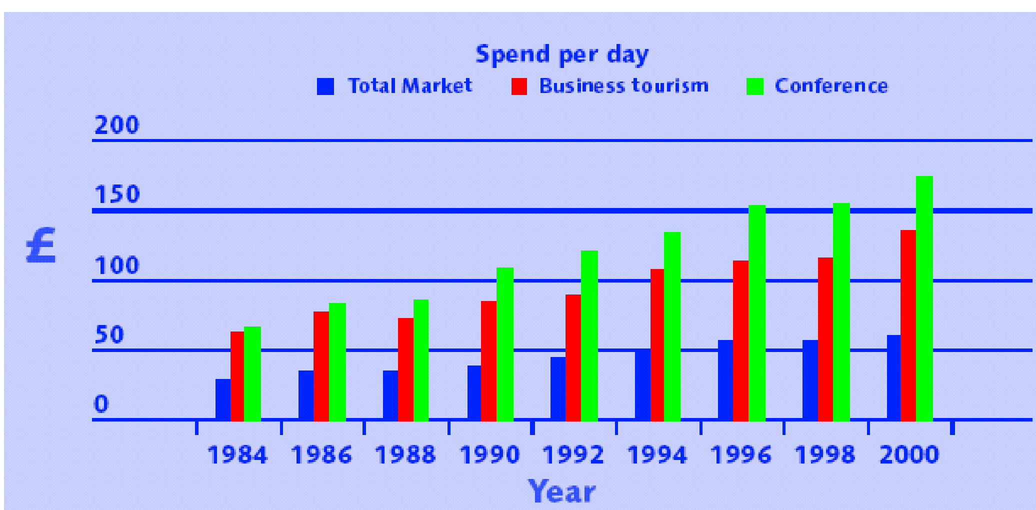


Figure 3.2 – Spend per day for inbound business, conference tourism
Source: Office for National Statistics International Passenger Survey, 2000, p.35

Figure 3.2 demonstrates that conference delegates have the highest expenditure levels in comparison to business tourists, although care should be taken with these figures are not expressed in real terms. The amount spent per delegate has also risen continually, from approximately £60 in 1984, to £177 per day in 2000 (Office for National Statistics International Passenger Survey, 2000). Examples highlighting the financial contribution of a conference venue to the destinations economy can be seen. The Edinburgh International Conference Centre (EICC) generated over £17 million for the local area in 2001 alone and over £90 million since its opening (Edinburgh International Conference Centre, Online, 2002). Moreover, in Harrogate direct spend by business visitors in 1999 was £139.6m, in the same year general tourist generated half this amount at £70m. This produced a total direct spend of £209.6m from both business and general tourism (Yorkshire Tourism Board, online, 2003). From this literature review it can be seen that the conference sector is able to attract high spending visitors who stay longer in the destination than the conference they attended (Braun, 1992; Greaves, 1998b; Office for National Statistics International Passenger Survey, 2000; Business Tourism Partnership, 2003).

Butler (1980) defined the involvement stage of the destination lifecycle as a period where a defined tourist season was created, however, during the decline stage the majority of visitors do not stay over night. Through the introduction of a conference venue the destination will benefit through the lengthening of the tourism season, as conference travel is less seasonal, compared to holiday travel, enabling better planning and utilisation of tourism infrastructure, while increasing the longevity of the tourism season (Kulendran & Wilson, 2000b). The destination is therefore not reliant upon day visitors within a defined season. This can be demonstrated within the U.K. where the largest number of non-residential conferences is more likely to be held in March, September and October, with residential conferences most likely to take place in September and October (British Tourist Authority, 2002). Conversely, smaller proportions of both non-residential and residential conferences took place during January, July, August and December, the peak holiday months (British Tourist Authority, 2002). There is generally a lull in the primary holiday periods of July and August as well as Christmas including the New Year, due to staff taking their annual vacations (Astroff & Abbey, 1991). The British Association of Conference Destinations (1998) strengths, weaknesses opportunities and threats (SWOT) analysis highlighted that one of the U.K. conference sectors strengths is that conference business is conducted throughout the year. The peak seasons are autumn and spring, complimenting the leisure tourism sector which peaks in summer. This seasonal pattern makes the conference sector particularly attractive to seaside resorts (Law 1993) and supports the theory that conferences are held in the ‘shoulder months’ of the tourism season, which helps to prolong the revenue-generating season for a destination (McCabe et al, 2000; British Tourist Authority, 2002; Business Tourism Partnership, 2003). Edinburgh ICC was built with the aim of ‘bringing business life to Edinburgh’s traditionally winter months between November and March’ (Tarpey, 1996 p.64).

As Butler (1980) stated, during the decline stage, the destination relies upon day visitors who do not demand overnight accommodation. Through the introduction of conferences this reduction in hotel occupancy rates experienced during the decline stage of the destinations lifecycle may be reversed. Up to 40% of overnight visitors in serviced accommodation are conference delegates with accommodation accounting for approximately 60-65% of total delegate expenditure in hotels, even where the hotel is not the conference venue (Law, 1993). This additional revenue flowing into the local economy invariably leads to the upgrading and expansion of the tourism infrastructure, such as the improvement in the hotel stock in order to supply a higher standard of accommodation as demanded by conference delegates (Lawson, 2000). This improvement in the destinations infrastructure will also promote the development of a high quality tourism industry, with the aims to reverse the decline experienced through the stagnation of a destination.

The introduction of conferences has been shown to attract delegate expenditure within the destination and also to extend the longevity of the destination’s revenue generating season, thus reversing aspects of the destinations decline stage. The net effect is to protect existing employment and also to provide additional employment opportunities. The British Association of Conference Destinations (1998) SWOT analysis identified that a further strength of the U.K.

conference sector is that it helps to sustain full employment. This protection and generation of employment opportunities is fundamental in the rejuvenation of a destination. Various methods have been employed to establish the levels of employment generated by a conference sector within a destination. An impact study utilises delegate numbers and expenditure to derive an estimate of the number of jobs created (Braun, 1992; Law, 1993). For example, the Birmingham ICC estimated that the centre itself would only generate approximately 125 jobs, however, an estimated 1959 further jobs would be created in the local economy (Saunders 2002). Furthermore, Edinburgh's ICC was estimated to create almost 1,000 additional employment opportunities within the local economy (Munro, 1994). PricewaterhouseCoopers (PwC, 2000) surveyed 264 venues in 11 countries (Australia, New Zealand, USA, Germany, China, Canada, Japan, Taiwan, Thailand, Austria and Switzerland). Of these 264, 94 were conference and trade show facilities, 82 were sports facilities and 88 entertainment facilities such as performing arts centres and other concert / theatre related venues, as shown in Table 3.2. Each venue was questioned on their activities and financial operations including the number of events, attendance, delegate origin, revenues, payroll and the number of employees.

Table 3.2 – Employment for participating facilities per venue

	Conference / Trade Venues	Sports Venues	Entertainment Venues
Per venue	157	185	76
Per 10 Event / Performances	7	20	5
Per 10,000 delegates (actual)	3	4	4

Source: Facility Management cited in PwC, 2000, p.23

Table 3.2 shows that on average, sports venues employ the greatest number of individuals per venue, with entertainment venues employing the least. A further seven jobs are created at participating conference and trade venues, 20 jobs at sports venues and five jobs at entertainment venues for every ten events held. In addition, every 10,000 delegates at participating venues generate three to four jobs for all venue classifications. The number and range of employment opportunities created both directly and indirectly through the introduction of conference facilities will create additional operational jobs for both the skilled and unskilled members of the community within many sectors (Janarius, 1991). Table 3.3 shows the indirect employment generated for the various conference venue classifications.

Table 3.3 – Employment for participating facilities by venue classification

	Conference / Trade Centres	Sports Venues	Entertainment Venues	All Venues
Surveys Completed	94	82	88	264
Employment**	14,800	15,200	6,700	36,700

** Rounded to nearest 100:

Source: Facility Management cited in PwC, 2000, p.24

Table 3.3 shows that the participating venues across 11 countries generated almost 37,000 jobs. The results from the PwC (2000) survey suggests that sporting conference venues generated even higher job opportunities indirectly than purpose-built venues and that the entertainment conference facilities generated the least job opportunities.

In order to assess the economic impacts of conference tourism, Dwyer & Forsyth (1997, p.23) adopted "an illustrative model that can be used to estimate direct spending, added value, economic output, direct employment and total employment generated by conference tourism within a nation". This model is a descriptive model, they did not present any figures with regards to the economic impact of conference tourism, but forwarded the theoretical linkages to form the multiplier effect of Meetings Incentives Conferences and Exhibitions (MICE) tourism, as shown in Figure 3.3.

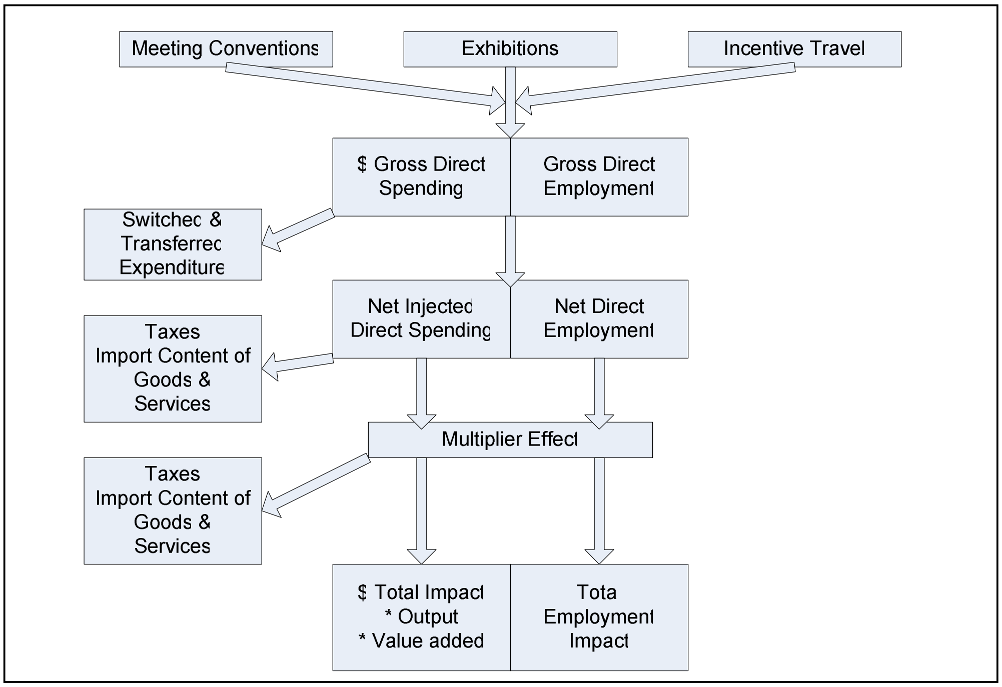


Figure 3.3 – Conference multiplier effect

Source: Dwyer & Forsyth, 1997, p.24

Through the economic multiplier effect, meeting conventions, along with exhibitions and incentive travel generates an increase in gross direct spending and employment (as shown in Figure 3.3). The amount of indirect impacts on income, employment, output and value added depends on the leakages out of the regional or national economy by way of taxes paid and the import content of goods and service demanded at direct and indirect levels.

Social development highlights the positive impacts of conference development within the community. The undertaking of a prestigious conference may result in a considerable amount of credibility for the destination and such publicity often promotes a 'sense of pride' within the host community (Rogers 1998). This is especially the case if a conference venue can attract large-scale conferences, such as the political conferences, which are often held in U.K. conference towns such as Blackpool, Brighton, Bournemouth or Harrogate.

These events produce an array of publicity, promotion and public relations advertising as well as exposure for the destination and the region. Delegates become unpaid ambassadors (Davidson & Cope 2002) and as such "a large number of potential repeat visitors become acquainted with the destination. If they are treated well and pleased, they will not only advertise with word of mouth, but will also likely visit the area on other occasions" (Abbey & Link 1994, p.275). As such resident's attitudes have the opportunity to undertake a degree of rejuvenation through the creation of a new sense of pride within the destination. Although there are many positive aspects to the introduction of a conference sector to a destination which counteract the onset of stagnation and decline, there are negative impacts on the destination that should be considered.

3.5 – The negative impacts of introducing a conference sector to a destination

Destinations should consider both the cost of construction and the operating costs when considering whether to rejuvenate through the establishment of a purpose-built venue, particularly when the venue is publicly funded. Future revenue should be offset against both initial construction and ongoing costs. Development and operating costs of a conference venue varies considerably, Table 3.4 shows the cost of constructing U.K. purpose-built venues that opened from 1991 to 1997. The lowest cost purpose-built venue opening during this period cost £6 million, with the most expensive venue costing £180 million (Scarborough Borough Council 1998).

Table 3.4 – The cost of major new conference & exhibition venues opened between 1991-97 in the U.K.

Location	Year of Opening	Capital Cost (£m)
International Convention Centre, Birmingham	1991	180
Edinburgh International Conference Centre	1995	38
Clyde Auditorium	1997	38
Belfast Waterfront Conference & Concert Centre	1997	32
Plymouth Pavilions	1992	25
Cardiff International Arena	1993	25
North Wales Conference Centre, Llandudno	1994	6

Source: Scarborough Borough Council, 1998

Additionally, refurbishment and / or extension costs can occur once the centre has been opened. For example Bournemouth's BIC cost £18 million to construct and £5 million to extend (Candal, 1989). The economic viability of building a conference venue is reduced in today's competitive climate as the lavishness and size of conference venues has increased the cost of construction considerably (Nelson, 1996).

Any benefits accrued through the construction of a conference venue may not necessarily aid the destinations peripheral regions. Thus, the sphere of influence is small as most conference delegates "meet, eat and sleep under one roof – the venue" (McCabe et al, 2000, p.21). Any new tourism infrastructure that interacts with conference delegates is established close to the venue, such as a conference hotel. Minimal development occurs in peripheral areas, as delegates are often limited in their ability to travel within a destination, preferring instead to rely on tourism infrastructure located centrally to the destination, such as hotels, restaurants and retail outlets.

As more destinations restructure towards offering conference facilities, so the sector is becoming increasingly competitive (Vogt et al, 1994). With this increased competition comes the possibility that supply may exceed demand (Murray 1995). Murray (1995, p.16) questions, "When will the bubble burst?" as the number of delegates and conferences cannot continue to increase. Evidence that supply may be exceeding demand comes from conference planners bargaining for lower rental rates (Nelson 1996; Shallcross, 1998; Davidson & Cope, 2003). This can be seen in the declining daily rates charged by conference venues for corporate delegates. In the U.K. the Conference Market Survey (Meetings Industry Association, 2001) identified that average daily corporate delegate rates fell from £34.50 in 1999, £32.95 in 2000. Investors should learn from the construction boom in hotels during the mid-1980s, which led to an over supply of rooms, which in turn led to hotel occupancies and room rates plummeting with many hotels going bankrupt (Nelson, 1996). The marketing reality of the 1990s has made large venues recognise that in today's highly competitive environment they cannot afford to ignore any potential markets (Letich, 1991). Basically, 'business is tough and the competition for meetings has become intense' (Crystal, 1992 p.84).

When a destination considers whether or not to develop a conference sector, it should also look at macro economies conditions, such as interest rates. 'When interest rates rose in 1998 in the U.K. the consumer, anticipated the harder times, by ratcheting down spending' (Brummer, 1998 p.28). This had a detrimental effect on the conference sector. Fewer bookings occurred, leaving spare capacity unsold which in turn resulted in a reduction in prices and profit levels (Brummer, ibid). However, large international meetings are often organised between two and four years in advance so that the true impact of any downturn may not be witnessed for some years in the future. The destination should therefore consider carefully the economic cycle, to ensure that the opening of any conference venue does not coincide with a period of economic recession. Opening a venue in times of economic recession would make the establishment of the venue within the conference sector more difficult, compared to opening the venue during a period of economic prosperity. Economies experience periods of economic prosperity and recession, with potentially positive and negative impacts for the conference sector respectively. During a recession, the corporate sector often reduces expenditure on conferences due to concerns over meeting travelling costs as it is discretionary expenditure (Bull, 1995; Lawson, 2000). This was experienced in the U.K. during the recession at the beginning of the 1990s (Davidson & Cope, 2003)

Social and environmental disruption within a destination due to conference venue development is inevitable (Rogers, 2003). When large numbers of delegates attend conferences, they often move on mass to a conference destination for short periods of time. This increased population density manifests itself in a number of ways including the level of traffic congestion and related parking availability, crowding of footpaths and streets as well as overcrowding in shops, restaurants and accommodation, presence of carnival atmosphere and the number of tourist in general. Once the conference is over, the density of inhabitants returns to pre-conference levels. This can create peak-trough population densities, which at their height may be greater than the carrying capacity of a destination. In developing a conference sector, a destination should therefore consider what changes will be required to its infrastructure. Associated with these changes will be an additional cost to the local economy of providing an infrastructure that can cope with the additional visitors that a successful conference venue brings (Davidson & Cope, 2003). Other social impacts include the residents' attitudes. The presence of a conference venue, and in particular high status conferences, can lead a considerable amount of credibility for a destination (Rogers 1998), and as such the local inhabitants may initially feel euphoric as the conference venue generates economic gains for the local community.

Tables 3.5 and 3.6 in Appendix A (refer to pages 404 and 409) provide a summary of the authors and research which support each of Dwyer & Forsyth's (1997 p.21-22) and Fenich's, (1992, p.194) positive and negative responses to the economic, social and environmental consequences of stagnation and decline by destinations through the introduction of a conference venue.

3.6 – Summary of Chapter Three

Although there is a dearth of literature specific to the use of conference venues as a rejuvenation tool for destinations within the post-stagnation stage of its lifecycle (Knowles & Curtis 1999; Agarwal 1997; 2002), this chapter has linked research concerning the economic, social and environmental costs and benefits of introducing a conference venue, to the economic, social and environmental consequences of a destination entering the post-stagnation stage, as conceptualised by Butler (1980) as discussed in Chapter Two.

Butler (1980) stated that for a destination to be within the post-stagnation stage of rejuvenation, it would have to develop either a new artificial attraction or utilise an unexploited natural resource. In response to this theoretical construct this research highlighted the studies by Bowie (1991), Morgan (1994) and Waight (2002) as examples of destinations introducing a conference venue, which resulted in both public and private investment in the local infrastructure (Nelson, 1996). Often the strategy of introducing conference facilities includes social and economic objectives at a local level (Go, Govers & Vliegenthart, 2002; Business Tourism Partnership, 2003) through the provision of infrastructure that can be used by local residents (Nelson, 1996).

To reverse the decline in employment, delegate numbers and expenditure are used to derive employment generated by conference venues (Law, 1993). The generation of employment is not limited to the venue itself, but also within the local community (Janarius, 1991). Associated with a reduction in employment is a reduction in income to which Greaves (1998a) highlighted the fact that conferences provide economic prosperity to a destination, to the extent that for each day a delegates remains in a destination they spend in excess of £100, with a further £100-£200 channelled into accommodation (Greaves 1998a; Business Tourism Partnership, 2003).

Butler (1980) also stated that as a destination enters the post-stagnation stage so fewer overnight guests visit the destination during the defined tourist season, hence revenue falls particularly for accommodation providers. In order to extend this defined tourism season, the Business Tourism Partnership (2003) and British Conference Market Trends Survey (2002) both highlight the use of conferences to prolong the revenue-generating season for a destination.

As a destination passes through the stagnation stage, Butler (1980) theorised that a destination would increasingly be viewed as unfashionable and as such visitors are attracted away, as the destination disengages from tourism. In response to this consequence, Rogers (1998) stated that undertaking a prestigious conference may result in a considerable amount of credibility [for the destination] (Rogers, 1998). In effect delegates become unpaid ambassadors for the destination and advertisers by word of mouth (Abbey & Link, 1994; Davidson & Cope, 2002).

The introduction of a conference sector is also associated with a number of negative aspects which may strengthen rather than reverse a destination's decline. In support of this view, Nelson (1996) stated that if the cost of construction results in the failure of the venue to be price competitive, delegates will not be attracted and the gains discussed may not be seen in the destination.

Linked to price competitiveness is the level of competition. The U.K. conference sector is becoming increasingly competitive (Vogt et al, 1994). Excessive competition may result in a reduction in the demand for conference facilities. Finally, there are negative social factors that affect a destination, in particular the peak / trough cycle of conference venues attracting more delegates than the carrying capacity of the destination can cope with during peak periods. Overall social and environmental disruption within a destination is inevitable (Rogers, 2003).

Overall this chapter has identified that many of the economic, social and environmental consequences of a destination entering the post-stagnation stage can indeed be corrected and reversed through the introduction of a conference venue. As such this research is in agreement with the work of Agarwal (1997; 2002) and Knowles & Curtis (1999) that a conference venue is a valid tool for rejuvenation. It should be noted that there are a limited number of negative factors, in the majority macro economic concerns, that should be considered when introducing a conference venue to a destination, however, the positives far outweigh the negatives.

CHAPTER FOUR – U.K. CONFERENCE SECTOR TYPOLOGY – A SECTORAL ANALYSIS

4.1 – Introduction

Rogers (2003) estimated that there were approximately 5,000 venues within the British Isles, however, less than a fifth of these would generate more than 40-50% of their annual turnover from conferences. This suggests that for the majority of venues, conferences are not their primary source of revenue. Other estimates have also been made with regards the U.K. conference sector size. Robinson & Callan (2003, 2005) estimate the number of U.K. conference venues to be 3,888, which together host an estimated 283,824 conferences per annum and attract an estimated 9,176,976 delegates per annum. Although estimates regarding the number of venues within the U.K. conference sector differ, authors agree that the U.K. conference sector is composed of many differing types of venues, thus the sector should not be considered as homogeneous (Pearce 1989; Weirich, 1992; Montgomery & Strick, 1995; McCabe et al, 2000; Rogers, 2003). This chapter outlines a number of typologies that have been used within the literature to classify venues within the U.K. conference sector. The chapter also highlights that many of theses typologies are now no longer valid, thus the need for a new typology is apparent. In identifying the need for a new typology this chapter will identify a number of new classifications which can be used to categorise the U.K. conference sector, in response to Objective and Hypothesis One. The classifications identified within this chapter, based upon the literature review, will then be utilised for development of appropriate questionnaires within the empirical data collection stage of this research.

4.2 – Conference venue supplier classifications

Suppliers are those involved with the provision of the conference market product to buyers (Leask & Hood, 2000). Table 4.1 in Appendix B (refer to page 412) highlights seven differing typologies proposed by authors since 1992 for the categorisation of conference venue suppliers. Within each typology are a number of classifications. This table highlights the temporal changes that have taken place since 1992 in both the terminology used and the number of classifications used by authors. Weirich (1992) uses seven differing classifications to categorise the conference industry, while Montgomery & Strick

(1995) reduces this to six. This is further reduced with both McCabe et al (2000) and Lawson (2000) using three classifications, however, these latter two authors sub-divided their dominant headings. The Venue Directory (2002) expanded the number of classifications used to four, which was again expanded to five by Davidson & Cope (2003) and Rogers (2003). Although the number of classifications differs and some authors use sub-divisions, there are many commonalities between the six authors for example, all authors use the term hotel as a classification.

4.2.1 – The dominance of hotels

During the past few decades, hotels have increasingly acknowledged the benefits of supplying conference facilities (Davidson & Cope, 2003). The British Tourism Authority (1984) estimated that the hotel conference industry was worth £1bn in the mid 1980s, in comparison to the Coopers & Lybrand Deloitte survey (1990), which valued the hotel conference sector at more than £6bn in 1990. During the 1990s, the hotel conference sector grew at a tremendous speed, faster than the previous decade. Hotels now account for approximately two-thirds of all conference venues (Rogers 2003) and provide approximately 70% of the meeting space in the U.K. (Shone, 1998).

All six typologies shown in Table 4.1 have the typology of hotels, indeed half of Montgomery & Strick's (1995) six categories are concerned with hotel classifications, namely 'Hotels', 'Resorts' and 'Limited service hotels'. McCabe et al (2000) lists hotels as a sub-division of 'Residential' venues and in doing so sub-divides hotels further based upon their location. Although Lawson (2000) does not sub-divide hotels by location, he does not list hotels within their own classification, preferring instead to list 'Convention hotels' under the classification of 'Adapted Use'.

This research does not support, for two distinct reasons, the view approach taken by McCabe et al (2000) with respect to the sub-division of hotels. First the other dominant headings concerning the U.K. conference sector, that of 'Non-residential' and 'Special venues' have not been sub-divided by location, leading to a bias within 'Residential venues' towards hotels. Secondly, sub-dividing hotels by location, or indeed any other characteristics, whilst maintaining an acceptable number of sub-groups, introduces the possibility that some hotels are not covered by any sub-grouping. This also applies to Montgomery & Strick (1995) as the only differentiation between hotels and limited service hotels is cost, where limited service hotels provide a service to smaller budget conferences. In essence both of these venue classifications are hotels. Additionally, resorts are seen simply as hotels which provide sporting attractions (McCabe et al, 2000). This research considers the use of sub-groups more appropriate when analysing only one specific category of conference venue, rather subdividing all categories for the entire U.K. conference sector.

Additionally, it is felt that Lawson's (2000) classification of hotels as being 'Adapted Use' is no longer valid. Due to the tremendous success of hotel conference facilities, many new hotels are constructed specifically with conference facilities rather than adapting their use. Many international and national hotel chains have now adopted a corporate stance of focusing on conference and business trade. "Many changes in the corporate structure of these groups have taken place over the past few years as they have repositioned themselves and adopted global strategies" (McCabe, 2002, p.188) so that they can become large providers of conference facilities to corporate groups. "Large hotel groups can build up links with companies and associations and can be important influences on the location of conferences through this knowledge of the market" (Law, 1993, p.42). In light of hotels dominance with regards to the provision of conference facilities, this research supports the view that the use of 'hotels with conference facilities' as a category of the U.K. conference sector is valid.

4.2.2 – Conference centres or purpose-built venues?

All authors in Table 4.1 (Appendix B, refer to page 412) use either the term 'Conference centres' or 'Purpose-built', however, within many of the typologies employed a number of related classifications are found. Weirich (1992, p.115) uses the terms 'Conference centre', 'Community centre' and 'Exhibition hall', where a conference centre is seen as "specifically designed, engineered and managed especially to accommodate meetings. Their entire physical plant is dedicated to making the running of meetings smoother and easier". This compares to a community centre, which is described as having a registration area, large area for general session along with smaller breakout rooms. Catering facilities are also offered, thus overall "they will have a great deal to do with the physical set-up of the actual meeting….. This is their business. Thus all meeting functions may be held under one roof" (Weirich, ibid, p.117). Fundamentally these two venue classifications serve the same purpose, indeed within the definition of a community centre no mention is made by Weirich as to why the term 'Community' is used, but the definition focus's on the purpose of the venue. The terms of conference centre and community centre can in the view of this research be simply classified as conference centres because the descriptions provided offers no clear differentials. Finally an "exhibition hall ordinarily does not offer meeting space…..however, focuses on trade shows and exhibitions with booths" (Weirich, ibid, p.119). This term of 'Exhibition Hall' can therefore be discounted as a typology within the U.K. conference sector, as generally, they do not cater for conferences alone.

Montgomery & Strick (1995, p.129) differentiate between convention and conference centres by stating that the latter provides overnight accommodation for delegates. This differs from the more traditional view, stated in Section 1.8.3, that both these terms are used to describe the same venue classification with the differentiation being that the U.K. uses the term 'conference' as a generic term for all meetings, where as the USA, Australia and Asia use the term convention, as such they have the same meaning (Spiller & Ladkin, 2001). Montgomery & Strick's (1995) use of accommodation to differentiate therefore ignores *the purpose* for which both convention and conference venues were built. They view the purpose of both convention and conference venues as being "created to meet the growing demand for specialised meetings". This research therefore rejects Montgomery & Strick's use of accommodation to differentiate between convention and conference venues, because the underlying purpose of these venues is indeed the same. Furthermore, they differentiate between hotels offering conference facilities and conference centres offering accommodation by focusing on their respective purposes, stating that the latter is "focused on the specific requirements of conferences rather than tourist travel" (Montgomery & Strick, 1995, p.129). Clear differentials are therefore provided between purpose-built venues and hotels. However, Montgomery & Strick (1995) offer no clear differentiation between the purpose of conference and convention centres.

The same pattern of inter-related terms can be seen with other authors in Table 4.1 (Appendix B, refer to page 412). McCabe et al (2000) uses the terms purpose-built and exhibition halls. While Rogers (2003) considers purpose-built and civic to be two differing classifications. With respect to civic venues, Rogers provides a brief description as "council chambers and committee rooms, town halls and other civic facilities, which are available for external hire" (Roger, 2003, p.48). These facilities were purposely built to undertake civic meeting and where required civic conferences, although initially not for financial gain. These venues have adapted to the increasing recognition of the benefits conferences provide for destination and are now offering these purpose-built meeting and conference facilities for external use. It is the view of this research that 'civic' is an unnecessary sub-division of the purpose-built category, as they are indeed built for the purpose of meetings and conferences, albeit not for commercial gain initially. A similar sub-division of purposely designed is seen in Lawson's (2000) differentiation between a conference venue and a multi-use auditorium.

Overall, with regards to the use of 'Purpose-built' and 'Conference centres' as classifications used to describe the U.K. conference sector, in many instances the terms can be used inter-changeably as the definitions provided by authors provide no clear differentials between the terms used. A typical purpose-built conference venue will "provide two auditoria, each with stage facilities and in some cases a dedicated concert hall may be included as part of the complex. There is also a range of multi use halls for meetings, banquets, functions and exhibits associated with conventions and numerous meeting or breakout rooms for smaller groups" (Lawson, 2000, p.41). In this definition of a conference venue Lawson brings together many of the terms used by other authors, such as auditoria, multi-use halls, exhibits and conventions into one definition. As such this research combines elements of two categories, namely 'Purpose-built' and 'Conference centres' to create a single classification of 'Purpose-built conference venues' which shall be used within this thesis.

4.2.3 – Universities, colleges or academic venues?

The authors in Table 4.1 (Appendix B refer to page 412) use the terms 'Universities' (Weirich, 1992; McCabe et al 2000; Lawson, 2000; Venue Directory 2002; Rogers 2003), 'Colleges' (McCabe et al 2000; Lawson, 2000; Rogers 2003), 'Academic' (Doyle, 2002a; Davidson & Cope 2003; Rogers, 2003) and 'Non-traditional' (used for many venues including universities and colleges) (Montgomery & Strick, 1995) to classify the provision of conference facilities by venues that focus on the provision of education. However, within the authors detailed in Table 4.1, it is only Davidson & Cope (2003) that include 'management training centres', which they classify as residential conference centres. Scandinavia and the U.K. were the first to develop the concepts of the dedicated management training and conference centres with accommodation (Davidson 1998; Gannaway, 2002). These venues are built for commercial purposes and are exclusively geared for business clientele. There are many advantages of hosting a conference, meeting or training programme at such venues.

> *"They have conference rooms with natural daylight specifically designated to hold meetings and a large amount of break-out rooms next to one another so access is easier. Nowadays, you can hardly distinguish between a training centre and a four star hotel, the standard of accommodation and catering has improved so much that these venues now compete on an equal footing" (Doyle, 2002a, p.29).*

With the inclusion of management training venues for educational purposes, the categories of universities, colleges and academic are no longer valid. The term 'universities' is also restrictive, as it does not encompass higher educational establishments or secondary schools, all of which have the possibility of hosting conferences and meetings as they offer a main hall and classrooms that can be used as breakout rooms. Thus, this research forwards the view that the term 'educational establishments with conference facilities' is today a more appropriate classification to describe venues within the U.K. conference sector, as this does not differentiate between the venues purpose.

4.2.4 – Unusual, miscellaneous or special venues?

Having defined a number of logical categories, authors have for many years been unsure how to classify those venues that do not fit neatly into their chosen groupings. Montgomery & Strick (1995) having defined typologies that take into account hotel related venues (hotels, resorts and limited service hotels), along with purpose-built venues (conference centres and convention centres), classify any other venue as 'Non-traditional'. However, as stated this includes colleges and universities, along with trains, cruise ships.

Other authors use terms such as 'Special Venues' (McCabe et al, 2000), 'Miscellaneous' (Venue Directory, 2002) and latterly 'Unusual' (Venue Directory, 2002; Davidson & Cope, 2003; Roger, 2003). The term unusual is a somewhat ill-defined term (Rogers, ibid). When examining the list of venues included in this classification, namely museums, historic houses, art galleries, theatres, sports venues, theme parks and castles amongst others, it can be seen that no 'unusual conference venue' is specifically catering solely for the needs of conference delegates, but rather visitor attractions are offering conference facilities alongside their primary business activity (British Tourism Authority, 1997; Leask and Hood 2000; Leask & Spiller, 2002).

'Unusual' should therefore not be related to the conference venue classification and the World Trade Organisation (WTO) supports this view, preferring instead to relate the term unusual to the delegates environment. The WTO suggests two dimensions to be considered when defining usual and unusual environments for delegates (den Hoedt, 1994 cited in Smith, 1997), that of frequency and distance. Destinations visited frequently and on a routine basis, even at great distances from the individual's residence, should be considered as part of that individual's 'usual environment'. Furthermore, places close to the individual's residence are

also considered within their 'usual environment' even if the specific sites are not often visited. WTO recommends that a threshold of 160km be taken for defining the 'usual / unusual environment' for domestic same day travel (den Hoedt, 1994, cited in Smith 1997). Thus environments further than 160km away from the delegate's place of residency and visited infrequently are termed 'unusual'.
The term 'unusual venues' is therefore viewed by this research to be inappropriate and not sufficient for venues which "continue to play a key part in the overall infrastructure of supply in the meetings market" (Davidson & Cope, 2003, p.106). Instead the trend is towards 'visitor attractions' diversifying to attract the conference market as a means of generating revenue, thus this research forwards the view that 'unusual venues' should be referred to as 'visitor attractions with conference facilities'. Whereby a visitor attraction is defined by the English and Scottish Tourist Boards as being;

> *"a permanently established excursion destination, a primary purpose of which is to allow public access for entertainment, interest or education, rather than being primarily a retail outlet or a venue for sporting, theatrical or film performances"* (Millar, 1999, p.5).

However, Millar (1999) disagrees with the omission of sporting, theatrical or film performances and suggests that they are all visitor attractions. This research supports the view of Millar that sporting venues are indeed visitor attractions. Many now offer conference facilities as well as a tour of the venue or venue museum to which delegates have access, for example Old Trafford Football Ground, Silverstone motor racing circuit and Twickenham rugby stadium (Saunders, 2001a; Gosling, 2002a).

Visitors can be categorised into tourist (overnight visitor) and same day visitors (Smith 1997). The term visitor has therefore been chosen simply because it does not indicate that the delegate has stayed overnight, which is an appropriate definition as not all attractions offer facilities for an overnight stay. Indeed only 8% of visitor attractions in the U.K. offer residential facilities (Leask & Hood, 2000). Many meetings are held for less than 24 hours and do not require overnight accommodation. It is therefore fitting to use the term 'visitor attraction with conference facilities' rather than 'tourist attraction with conference. Refer to Table 4.2 for the WTO definitions for travellers' classifications.

Table 4.2 – WTO travellers' classifications

Terms	International tourism	Domestic tourism
Resident	A person who has lived in a country for at least 12 consecutive months prior to arrival in another country for a period not exceeding one year.	A person residing in a country for at least six months prior to arrival in another place in the same country.
Visitor	A person who travels to a country other than that of his usual residence and that is outside his usual environment for a period not exceeding one year and, whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited.	A person residing in a country, who travels to a place within the same country but outside his usual environment for a period not exceeding six months and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited.
Tourist	A visitor who travels to a country other than that of his usual residence for at least one night but not for more than one year and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited.	A visitor residing in a country, who travels to a place within the same country but outside his usual environment for at least one night but not for more than six months and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited
Same day visitor	A visitor who travels to a country other than that of his usual residence for less than	A visitor residing in a country, who travels to a place within the same country but outside his usual

	24 hours and without spending the night in the country visited and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited.	environment for less than 24 hours and without spending the night in the place visited and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited

Source World Tourism Organisation (1991) cited in Smith 1997, p.24.

Note; The following classes of individuals are excluded from tourism statistics: boarder workers; temporary immigrants; permanent immigrants; nomads; transit passengers; refugees; military personnel; consular representatives; diplomats; and dependents and household servants accompanying military personnel, consular representatives and diplomats.

The demand for visitor attractions with conference facilities is growing, as companies have become more competitive in choosing venues, which shall impress their clients. After all, the attraction is not the room, but the venue itself. Companies look for venues that will fit the theme of the event. For example, an ecological company may choose a horticultural venue. Such venues are no longer as much of an unconventional choice as they once were. As more museums, castles, stately homes and theme parks identify the value of the conference market, the more they will respond to conference organisers' needs (Wills, 2002c).

Visitor attractions offer the greatest diversity within venue classifications, Table 4.3 highlights that there is an extensive range of visitor attractions with conference facilities (venuefinder, online 2004). These ranges from castles, country houses and historic buildings with or without accommodation, museums, galleries, fun parks, boats, trains, sport and leisure centres, theatres and concerts. Examples are seen in Madame Tussaud's in London, Haynes Motor Museum in Yeovil, Legoland in Ascot, Alton Towers in Staffordshire, the Eden Project in Cornwall and the Globe Theatre in London (Gosling, 2002a; Pemble, 2000; Nicholson, 2000; Saunders, 2001a; Wills, 2002c).

Table 4.3 – Examples of visitor attractions with conference facilities within the U.K.

Attraction type	Example
Racecourses	Ascot, Chepstow, Sandown, Newmarket and Brighton.
Theme parks	Alton Towers, Thorpe Park, Legoland and Diggerland,
Motor Racing	Brands Hatch, Donington Park and Silverstone
Castles	Amberley, Caernarfon, Cardiff, Dalhousie, Edinburgh, Hever, Kenilworth, Leeds, Shieldhall and Warwick
Museums;	The RAF Museum in Hendon, The Cabinet War Rooms, the Natural History Museum, Duxford Imperial War Museum, National Museums of Scotland, National Museum and Gallery in Cardiff, Beaulieu Motor Museum and the National Motorcycle Museum.
Stadia	Old Trafford (Manchester United) Celtic Park (Glasgow) and the Millennium Stadium (Cardiff) and The National Indoor Athletics Centre at UWIC in Cardiff
Houses	Spencer House, Highgate House (near Northampton), the Chartered Institute of Marketing (Cookham), Hill House, Somerton (Oxfordshire), Middle Aston House (Oxfordshire) and Coopers & Lybrand's Latimer House in Buckinghamshire and Elvetham Hall (Hartley Wintney)
Cruise ships	Radisson Seven Seas Cruises, Carnival Cruise Lines, Golden Princess Royal Caribbean International, Radiance of the Seas, Celebrity Cruises, Norwegian Cruise lines, Silversea Cruises, Royal Olympic Cruises, the QE2 and Stena Sealink,
Miscellaneous	The Eden Project in Cornwall, London Zoo, British Airways London Eye and The Lowry Centre in Manchester

(Source; venuefinder, 2004; venue directory, 2004)

Leask & Hood (2000) suggest that many visitor attractions enter the conference market based on perceived demand, rather than actual evidence of real demand. Suggesting little research is carried out before the visitor attraction diversifies its product to supply conference facilities. It is perceived that the conference market offers these venues the opportunity to attract business in off-peak times, when the properties might not otherwise be occupied and to broaden their revenue mix (Leask & Hood, ibid). The addition of conference facilities not only perceived to lengthen the revenue-generating season in terms of months of the year but also extends it from day into night. Visitor attractions are open to the public during the day, but closed during the night. Rather than wasting their resources, many have started attracting corporate events. Such venues offer their facilities during the day, most provide great ambience and atmosphere in the evening, this way they boost their revenues and give prestige to the company (Saunders, 2001).

There are few barriers to entry within the conference market. Organisations with the necessary facilities (room, table, chairs and basic equipment) can provide an area for conference activity and thus enter the conference market (Leask & Hood, 2002). This would suggest that many venues such as the visitor attractions, which enter the conference market purely to broaden their revenue mix, would start by offering the most basic conferencing facilities. Additionally, they are able to assess the market before investing heavily. To those outside the sector offering conference facilities is considered very attractive as it is viewed as simply using otherwise empty space (Leask & Hood, ibid).

In addition it is hoped that the business visitor to a property will return at a later date as a leisure visitor. (Leask & Hood, ibid). Such venues have either adapted or added to existing facilities in order to offer meeting facilities to subsidise income for the upkeep of the building or generate additional revenue. Changing funding systems and increased competition for leisure spend within the U.K. tourism industry has resulted in many properties having to generate more revenue or look to alternative business mixes (Leask & Hood, ibid). In particular museums and galleries have been hit by decreased central and local government funding (Leask, Fyall & Goulding, 2000). Additionally, Shallcross (1998) forwards a further contributing factor that of the National Lottery who provides development grants which often contain conditional clauses that state such venues must seek income from new sources. A reduction in government funding has encouraged many visitor attractions to diversify their revenue generating activities, with conference activity providing lucrative and innovative opportunities (Leask, Fyall & Goulding, 2000; Leask & Hood, 2000). It was not until funding sources, such as the Millennium Commission and the National Lottery, became available that the number of visitor attractions offering conference facilities increased.

4.2.4.1 – The Millennium Commission

The Millennium Commission utilised funds from the National Lottery. It funds projects throughout the U.K. and stimulates partnership funding from local authorities, government programmes, charities, private investment and European grants (The Millennium Commission, 2001). The awards were often one off payments, in comparison to previous government funding or local authority funding, which may be given on an annual basis. Although no direct award was given to build a purpose-built conference venue, many attractions decided to incorporate conference facilities into their development proposals to stimulate revenue on an annual basis, with the aim of becoming self-sufficient. Examples of visitor attractions or venues, which have received grants and provided conference facilities, refer to Table 4.4.

The Millennium Commission is not solely connected with the establishment of new visitor attractions but existing venues have benefited since the new source of funding has become available. Overall the conference sector has benefited from this upsurge in the number of attractions renovating and refurbishing their facilities and has started supplying conference facilities.

Table 4.4 – Examples of visitor attractions that have received grants and which provide conference facilities

1. **The Northern Ireland Community Outreach Centre**, University of Ulster, Belfast, received a Millennium Commission grant of £1,500,000. This is a high–quality building of unique design to provide a bridge between the university and the community via Internet links and video-conferencing.
2. **Norfolk and Norwich Millennium project** established by the Norfolk and Norwich Millennium Company Ltd. This is a project linking three main facilities - a millennium library, a conference business / learning centre and a heritage attraction all contained in the new urban square. This project received £30,069,000 in Millennium Commission grants.
3. In Greater London, the **Leadership Development Centre** provided by the Mentor Trust and City Islington College. It involves the provision of an IT and conference facility, supporting community leadership training on the site of the former sports hall of City and Islington College. This project received a £500,000 Millennium Commission grant.
1. Many other attractions have incorporated conference facilities into their proposals, for instance, **Our Dynamic Earth in Edinburgh, the Millennium Stadium in Cardiff, the redeveloped Hampden Stadium in Glasgow, Tate Modern in London and the National Botanical Gardens of Wales in Carmarthenshire** all offer conference facilities.

Source; The Millennium Commission Annual Report, 1999-2000, pp.11-17.

4.3 – Four classifications for the U.K. conference sector typology

A review of typologies forwarded by six authors for the U.K. conference sector since 1992, has identified that many do not offer any clear differentials between the categories used, leading to confusion. Additionally the use of sub-divisions based on characteristics, such as location or cost, results in a number of concerns and/or consequences, namely;

- The identification of valid characteristics to differentiate between venues.
- If not all dominant headings are subdivided by the selected characteristic, then bias within classifications in favour of the selected characteristic will occur.
- The opportunity for venues to fall between sub-divisions and hence not be included in any category.

Overall the review of the selected typologies has highlighted that such venue classifications are often confusing and unnecessarily protracted through the use of sub-divisions. In response to these criticisms, this research forwards the view that four classifications are sufficient to classify the modern U.K. conference sector. This classification is based solely upon the nature of the venue, as opposed to the level of usage or location. The four classifications forming the most applicable typology for the U.K. conference sector are;

1. Purpose-built conference venues.
2. Hotels with conference venues.
3. Educational establishments with conference venues.
4. Visitor attractions with conference venues.

4.4 – The characteristics of purpose-built conference venues

A purpose-built conference venue can be considered as the most visible indicator of a destinations active role within the conference sector (Davidson & Cope, 2003). There is an extensive range of purpose-built venues located in almost all major cities globally, which have invested in prestigious venues in order to attract major international events (Seekings, 1996). The U.K., for example, has 11 international conference venue cities (Aberdeen & Grampian, Belfast, Birmingham, Bournemouth, Brighton & Hove, Cardiff, Edinburgh, Glasgow, Harrogate, London, Manchester (British Tourism Authority, 2003).

As the name 'purpose-built' suggests, these venues are intentionally designed to host the largest conferences (Rogers, 1998). Indeed the primary differentiating characteristic between this venue classification and the other venue classifications is the extensive space provided to cater for conferences where delegate numbers may run to several thousands. They are in general well-equipped with modern audio-visual-equipment, as well as offering a full range of hall sizes for meetings, banquets and functions, along with numerous meetings or breakout rooms and typically employ professionally trained staff (Foster, 1994; Lawson, 1996; Shallcross, 1998). "Besides meeting rooms, a typical purpose-built conference venue also offers on-premises business and telecommunications services and provides guests with access to computers, fax machines and other equipment" (Foster, 1994, p125). In particular, the possibilities offered by new technology such as teleconferences, are considered to be essential equipment for international facilities (Davidson, 1998). "One of the main reasons organisers will choose purpose-built venues over hotels is their flexibility" (Medhurst, 2000, p39). Purpose-built venues are very adaptable as they are specifically designed to cater for the conference sector. "The versatility of the building means we can do almost anything our clients want, from installing a cyber-cafe to completely theming a banqueting room" (Taylor cited in Medhurst, 2000, p39).

A fundamental characteristic of purpose-built conference venues is that the majority are municipally owned, although the management of such venues is a combination of public / private sector partnerships (Mills, 1991; Davidson & Cope, 2003). In many instances it is the local authority that has funded the construction of conference centres. The management of the venue is subsequently passed to a mixed economy company (a mix of public and private ownership), with the local authority remaining a major share holder (Tuppen, 1996). Often local authorities intervene to subsidise the running costs of the venue, as it is rare that revenue exceeds costs. Purpose-built conference centres have often been constructed and operated using public funding. In many cases "few make a true profit, taking into account the cost of construction and interest on capital" (Seekings, 1996 p.52).

Any loss or debt charges incurred by a conference venue are borne by local inhabitants and businesses through taxation (Lawson, 2000). However, the economic benefits of attracting delegates, as discussed in Section 3.4, should be considered. Investment in purpose-built venues therefore is not based upon traditional project-cost feasibility analysis alone, as revenue rarely exceeds operating costs, but rather its dependence upon public funding is justified through wider economic, social and environmental objectives that the destination strives for (Davidson & Cope, 2003). Therefore purposes built venues are often run as loss leaders, to bring business to the conference destination (Davidson, 1998).

As stated in Section 3.3, investing in a conference venue can result in the revitalisation of blighted areas through the use of a conference venue as a centrepiece for creating the image of a vibrant urban centre (Dwyer & Forsyth, 1997; Fenich, 1992). Therefore purpose-built venues are often built close to the centre of a destination and it is this central location that is also one of the essential advantages of attracting conferences to a destination. A conference venue location must be central and easily accessible (Murphy, 1985; World Trade Organisation, 1997). When such venues are planned, transportation networks and car parking facilities are key to the planning procedures (Medhurst, 2000), with the aim to absorb a large number of people entering and leaving a destination at any given time. A study by Coopers Deloitte (cited by Richards & Richards, 1994) indicated that accessibility is paramount, particularly the proximity of a motorway and a major city, as conference delegates must be able to attend the conference with minimal travelling time to the destination. To reduce travel costs and paid-time for travelling, conference organisers will prefer to choose a conference venue which is accessible by all modes of transportation.

Due to their central location, ease of access and in order that a venue maximises its revenue streams, many conference venues are in reality multi-purpose buildings (Davidson & Cope, 2003). This is another important characteristic of many conference venues. Although designed and planned as conference venues, once opened they have extended their revenue streams by competing for events from a multiple of sources, such as the entertainment, recreational and cultural needs of the local inhabitants and tourism visitors (European Federation of Conference Towns (EFCT), 1997 cited in Davidson, 1998). In support of this move, Lawson (2000, p.8) provides economic justification by stating that "it makes economic sense to provide for dual or alternative use. Meetings mainly occur on weekdays whilst weekends and the evenings are times for leisure and entertainment."

Although Montgomery & Strick (1995) include the provision of accommodation in their definition of conference centres, it is accepted that another key distinguishing feature of a purpose-built conference venue is that the majority do not traditionally offered on site overnight accommodation to delegates. Instead they rely on accommodation provided by hotels within the vicinity (McCabe et al, 2000). For example, the Manchester International Convention Centre (MICC) offers capacity for 800 delegates, 11 breakout rooms and a 2,000sqm multi purpose hall with seating for 1,300 people. Financed by Manchester City Council and a European development fund grant, the MICC has three hotels within 50 metres of its doors and a further five hotels within five minutes walking distance (Roberts, 2000). However, in recent years there has been trend towards the establishment of dedicated residential conference centres.

4.4.1 – Dedicated residential conference centres

Similar to the concept of management training venues, the concept of privately funded dedicated residential conference venues with accommodation, built for commercial purposes, are most developed in Scandinavia and the U.K. (Davidson, 1998). Such venues have developed throughout the U.K. due to a lack of public funding to build purpose-built venues. They have been developed to meet the demand of the conference delegate, who require specifically built conference facilities along with residential facilities free from the distraction of general tourists (Davidson, ibid).

There are many advantages of hosting a conference, meeting or training programme at such venues. "Because they're purpose-built they have conferences rooms with natural daylight specifically designated to hold meetings and a large amount of break-out rooms next to one another so access is easier" (Doyle, 2002a, p.29). Davidson (1998) highlighted that few U.K. dedicated residential conference venues have emulated the resort orientation of their U.S. counterparts through the integration of leisure facilities, such as golf courses, into the work environment without it becoming counter-productive to the principal objective. However, this may not always be the case. An example can be seen at the Wyboston Lakes Centre at St. Neots, Bedfordshire, which offers a purpose-built venue that has incorporated soundproofing, air-conditioned facilities and breakout rooms. Along with 370 bedrooms, a golf driving range, health and fitness centre, water sports and a swimming pool (Wyboston Lakes, 2003).

4.5 – The characteristics of a hotel conference venue

For hotels, the appeal of offering conference facilities enables underutilised resources and infrastructure to be put to profitable use, whilst increasing occupancy rates (Shallcross, 1998). Although badly lit rooms, flipcharts and indelible marker-pens were once marketed as a complete package, hotels offering conference facilities are today characterised by trained staff offering specialist marketing and organisational skills, a single point of contact, money back guarantees and all-inclusive quotes (Chetwynd, 1998). To these selling points must be added the clearest advantage that a hotel offers a conference delegate. Where overnight accommodation is required, delegates remain in a single place not only for the conference location and accommodation, but also catering and leisure activities (Davidson & Cope, 2003).

Although there are many benefits offered by a hotel with regards conference facilities, hotels are by no means suited to every conference type. By offering conference facilities, hotels must cater for both the needs of delegates and non-delegates, thus mixing leisure and business guests requirements requires hotel staff to adapt (Davidson & Cope, 2003). Additionally, many have limited capacity when compared to purpose-built venues discussed earlier, doing extremely well as conference venues for several hundred delegates (Greaves, 1999). Associated with this restricted capacity is another distinguishing characteristic of many conference hotels, that of inflexible conference space. Telford (1999, p.78) cites the director of a meeting planning agency who states that “London is deficient when it comes to decent conference space coupled with bedroom space. The problem is that hotels tend to have one available meeting space – usually a wonderful ballroom – and that's it”.

4.5.1 – Hotel Classifications

Although this research does not favour the sub-division of categories used to describe the *entire* U.K. conference sector, hotels can be sub-divided based upon hotel classifications, refer to Table 4.5.

There is a number of differing hotel classifications competing for this conference trade. The hotel sector is classified in a number of different ways based on hotel characteristics, including size of establishment, tariff charged, ownership and location. The main types of hotel involved in providing conference facilities can be grouped into five categories (Lawson, 2000, p27) see Table 4.5. Each of these five differing groups are characterised by a distinct set of qualities. Large city centre business hotels are characterised by the ability to host the largest conferences in terms of delegate numbers and the largest variety of events, from international meetings to product launches. They are also characterised by having a location central to the destination, thus being close to the commercial area.

The central location has good transport access to it and public transport is easily accessed within it. Within the venue, the hotel is focused towards business guests and hence offers a high standard of business service, with all the facilities expected of a hotel, such as room service, health and fitness centres along with evening function rooms. Due to the central location of the hotel often the size of this type of hotel is restricted, therefore meeting planners need to cope with smaller average size of the conference and meeting space. Conference organisers are able to negotiate favourable rates for the whole meeting package and ensure quality, arrangements and attention (Smith, 1989).

Medium-sized suburban hotels are characterised by being smaller than the city centre business hotels in both the number of delegates catered for and the variety of events attracted. Their location is characterised by being away from the city centre of the destination, although still within reach of the destination's centre, they are located close to major road junctions, such as motorways (Law, 1993).

Table 4.5 – Hotels types and their characteristics.

Type of hotels / locations	Meetings accommodated	Locational requirements	Distinctive features
Large city centre business hotels 250-600 rooms	International meetings (1) Medium–large conferences (2) Association meetings (3) Regular corporate events (4) Product launches	Central location Near commercial / business districts Good access / public transport Car parking	High standard business services Large ballrooms Spacious lobby Room service Leisure / fitness centre
Medium–sized suburban hotels 100-250 rooms	Corporate meetings Associations meetings	Near major junctions Access to highway routes Access to city centre	Meeting rooms for 25-100 Work stations in guestrooms Easy access Car parking Small gymnasium
Large resort hotels integrated resorts 300-12,000 rooms	Major conferences (2) Corporate training and events Incentive travel	Near resort centre and /or attractions Spacious grounds	Large ballroom(s) Extensive meeting and function room, Recreation facilities Golf courses (6)
Airport hotel 250-400 rooms	International meetings Regular corporate events Association meetings	Linked or near to terminal, Easy access to city and regional transport and highways signposted	May have purpose-designed lecture theatre Usually a range of medium-sized and small meeting / function rooms, Health / fitness suites Extensive glazing / soundproofing
Country hotels, boutiques resorts, 80-120 rooms	Exclusive corporate meetings	Remote locations Spacious grounds	Small meeting rooms and suites High quality services Health / fitness suites golf course

(1) International congress and other meetings; (2) Full membership association meetings (3) Committee, professional development and similar association sponsored meetings; (4) Management, sales, stockholders' and other corporate meetings;(5) Mainly for the services sector and fashion goods; (6) Golf course on site or nearby (Source; Lawson, 2000, p.130).

As with the city centre hotels, suburban hotels have all the facilities expected of a hotel, although such hotels are often smaller. Again, as with the business hotels, the conference and meeting space is small. On average, they have meeting rooms for between 25 and 100 delegates. Conference organisers are also able to negotiate favourable rates for this type of venue with respect to the whole meeting package and ensure quality, arrangements and attention (Lawson, 2000).

Resort hotels attracts the largest number of delegates, although attracting delegates from three main events which is a narrower focus than the business hotels but wider than the suburban hotel (McCabe, 2002). Their location is characterised by being close to the resort centre as well as the local attractions. This enables the delegates to not only participate in conference activities but also participate in local attractions. The hotel is located in large grounds often containing a golf course or such a course located close by. Inside the hotel, as with business hotels, there are large ballrooms, although differing from suburban and business hotels, the resort hotel has extensive meeting and function facilities. By providing conference facilities, it enables the resort hotel to remain open all year round (Lawson, 2000).

Airport hotels attract a similar number of delegates as business hotels, with three of the six business hotel events also occurring at airport hotels (British Tourist Authority, 2002). Their location is dominated by their close proximity to airport terminals, as well as having easy access to the destinations centre and public transport for the region. Airport hotels charge high prices for their conference product due to their prime location of their venue (McCabe, 2002). Inside the hotel, they have similar sized function and meeting rooms to that of the suburban hotel. Due to their proximity to airports, a particular feature of airport hotels is the prominence of soundproofing, such as double-glazing. The Meetings Industry Association (2002) identifies that airport hotels are the third most popular meeting venue for corporate buyers. Ranked above purpose-built conference centres and visitor attractions, airport hotels were used by 50% of the 300 corporate buyers surveyed (Gosling, 2001). Until recently, airport hotels focused on the corporate business traveller, selling overnight rooms with little in the way of modern meeting space or leisure options. Conversely, the airport hotel 'product' has evolved considerably over recent years. The previous focus on such residential business has in many cases been superseded by the provision of high quality meeting rooms, business centres and a competitive market has prompted parallel investments in accommodation, dining and recreational facilities (Gosling, ibid).

Country or rural hotels attract the smallest number of delegates, with between 80 and 120 guestrooms and attracts exclusive corporate meetings (British Tourist Authority, 2002). They are characterised as being in remote locations and as with resort hotels, are often situated in spacious grounds, with a golf course either on site or within close proximity to it. The hotel is characterised by having small meeting rooms and offers a high quality service to corporate delegates. As with all hotel types, fitness facilities are available to delegates. Country or rural hotels try to capitalise on the exclusive end of the corporate market.

> *"Selling the idea that the venue is yours to use and you won't be disturbed by anyone else is a big pull for today's high-end meetings… Clients need to feel away from it all… They want to see rolling countryside, mountains or a lake at the least…the personal service these venues offer can create a relaxing, calm atmosphere you don't always find in a more stressful town or city hotel environment"* (Gannaway, 2002 p.42).

Irrespective of hotel type, ownership is another important differentiating characteristic. Ownership can be either independent or chain owned. Hotel chains have been particularly effective in developing conference business by creating specialised conference sales teams.

> *"Service standards within the hotel conference sector are also likely to improve because the hotel groups will seek to provide branded conference and meetings facilities world-wide, which will offer product consistency regardless of location around the world"* (TTI, 1998 p.19).

The Conference Incentive Travel Hotel Chain Survey (Conference Incentive Travel Hotel Chain Survey) (2002), cited in Creevy, (2002a) identifies the top three hotel chains globally as Accor, which has 3,525 properties, Six Continents ranked second with 3,270 followed by Marriott International with 2,600. While all three have increased the number of properties in recent years, the major development is the re-branding of Six Continents, formerly Bass Hotels & Resorts (Creevy, 2002a). Most hotel chains and large hotels offer conference packages, which include the services of specialised professional conference staff and other facilities such as golf courses, swimming pools and fitness centres, which are attractive to delegates who are staying over night. There are a number of significant factors that, in combination, yield a competitive advantage to trans-national hotel groups (Go & Pine, 1995).

These include;

- Provision of high quality services under a brand clearly recognised by customers.
- Ability of such groups to respond quickly to new or changing market conditions.
- Considerable organisational and managerial economies that enable good standards of service to be provided.
- Availability of global travel reservations systems.
  (Go & Pine, 1995, p.8 cited in Williams & Shaw, 1998, p.30)

Chain owned hotels are characterised by the standardisation of its hotel product in order that it can be promoted globally, with a strong brand identity that will achieve more than just a price advantage. Such standardisation enables hotels to possess instantly recognisable styles and logos, which offer a standard quality to the delegate who faces the alternative of choosing a local hotel and conference product (Lawson, 2000). To quote one advertising slogan "you're never far from a Hilton….For the business tourist making his first visit to a country, the familiar hotel architecture and the multi-national promise an enclave of familiarity and security in a strange and threatening world" (Morgan, 1994 p.381-382). Creating such a standardised product enables chain hotels to use both centralised marketing techniques effectively in order to reach potential customers and central reservation systems. They can agree special terms with major clients who undertake conferences in multiple locations. However, the conference product they receive will be standardised across all locations. Due to their size of operation many chain hotels can negotiate competitive prices from suppliers, combining this with the standardised conference product creates a competitive advantage over independent hotels (Law, 1993).

4.6 – The characteristics of educational establishment conference venues

The third of the four venue classifications used within this research to classify the U.K. conference sector is that of educational establishment venues. The single most significant characteristic of an educational establishment, with respect to conferences, is that that are built with 'learning spaces', such auditoria, lecture theatres and classrooms are all suited to conference activity (Davidson & Cope, 2003). During vacations these resources can be utilised along with accommodation that is traditionally provided for students during term-time.

Another characteristic of educational establishments is that they are in general either located centrally to a destination, or located on its outskirts, with major trunk roads and/or motorway access (Paine, 1993). Both locations are ideal for conference delegates to reach. An example can be seen at The Lakeside Conference Centre at Aston University, which is easily accessible via the M6, M1, M5, M42 and M40 motorways and Birmingham International Airport is situated nine miles away (Aston University, online 2004). Centrally located hotel conference facilities are often very expensive, especially accommodation rates such as in central London. Educational establishments can offer the opportunity for a centrally located conference at a greatly reduce cost. Such venues "generate much lower revenue per delegate per day than venues such as hotels, but delegate volumes tends to be higher" (Shallcross, 1998, p.B-46). This lower cost of conference facilities offered by educational establishments is also a feature of such venues.

Although the design of educational establishments suits conference organisers, along with the ease of access and lower costs charged, much of the literature concerning the use of educational establishments as conference venues is limited, with a negative perspective (Rutherford, 1990; Davidson, 1998). Authors have frequently conveyed that educational establishments are for the conference organiser with restricted finances, or specific educational connections. Markets for conferences held in educational establishments tend to have a strong academic orientation and membership, with scientific and cultural subjects predominant. Educational establishments have the advantage of providing specialised facilities, adequate if not sophisticated accommodation which, for many delegates, is compensated by low costs and the availability of other sport and social facilities (Rutherford, 1990). Traditionally, universities have succeeded best in two niche markets: high attendance, low budget conferences and the smaller training and management seminar type of events (Davidson, 1998). Limitation can be summarised as:

- Limited period available, vacations usually do not match the conference season.
- Quality of student accommodation, which is offset by other economic criteria and is often inadequate for more mature business visitors.
- Design of classrooms and lecture theatres, which are mainly dictated by large group teaching needs and may not be able to meet the standards and flexibility required for conference organisation (Lawson, 2000, p.159).

Academic vacation periods do not naturally align with the peak conference season, creating difficulties for conference planners. As discussed in Section 3.4, there is generally a quiet period in U.K. conferences primarily in the holiday periods of July and August, as well as Christmas including the New Year (Astroff & Abbey, 1991). It is in this conference lull that educational establishments have the greatest availability of accommodation and conference rooms. During the peak conference season, educational establishments have limited spare capacity in terms of accommodation and conference rooms. "This is a major restriction for the commercial and industrial user since the university vacations coincided with the peak holiday periods, when business activity tends to slow down" (Seekings, 1996, p.50).

Educational establishment's accommodation is characterised as being 'utilitarian', with infrequent redecoration programmes (Seekings, 1996). In general, educational establishments possess a housing stock of some considerable age. Such buildings were designed and initially used solely for student accommodation, with the aim of housing as many individuals as possible. This desire to house most if not all students has resulted in accommodation being comprised of single dwelling rooms of limited space, with communal washing facilities, although most university accommodation possess a hand basin in each room (Paine, 1993). Additional facilities such as televisions and telephones are not common in accommodation offered by educational establishment; both of these facilities are often supplied as communal resources. This is in stark contrast to accommodation offered by hotels, which include en-suite facilities, telephones and televisions within the delegate accommodation. Furthermore, services such as room service and a dedicated conference resource are not usually offered within educational accommodation (Paine, ibid). However, one advantage of holding a conference at a university is the size of the accommodation stock. As educational establishments offer accommodation for large numbers of students. This is attractive for large association conferences, which need to accommodate large numbers of delegates. Conference planning is made much easier as all the delegates are located on one campus (Lawson, 2000).

The design of classrooms and lecture theatres also characterises educational establishment conference facilities, in that they are primarily dictated by large group teaching needs and may not be able to meet the standards and flexibility required by conference organisers (Lawson, 2000). Educational establishments offer practical conference rooms and good audio-visual equipment (Smith, 1989). Educational establishments such as universities and colleges offer their facilities for the corporate market, as investment occurs so academic venues are becoming more and more desirable (Walk Den, cited in Doyle, 2001) and are "an increasingly feasible choice" (Creevy, 2002b p43). Educational establishments are usually equipped with up-to-date equipment and some of the best lecture rooms (Seekings, 1989) and have support teams available for the technical equipment (Doyle, 2001). For Example, Warwick Conferences is the fastest growing commercial arm of the University of Warwick. It is highly successful with an annual turnover in excess of £17 million (Warwick University online 2003). Warwick promotes the importance of hosting conferences within an academic environment, as an important revenue generator for educational establishments.

Educational establishments are also flexible in terms of sizes and events. "Unlike hotels they provide a focused learning environment, geared towards business learning" (Doyle, 2001 p48). The popularity of educational establishments as conference venues is rising. However, they are also seen as a competitor to other types of conference venues. They have many other positive points, such as the size and number of rooms available, allowing flexibility in terms of space, quality of equipment and other facilities and a great choice of locations available (Doyle, 2001; Pemble, 2002). For example, the facilities on offer at the University of York include an exhibition centre with 900m^2 of space, a multi-purpose auditorium to seat 1,190 and over 100 fully equipped lecture theatres and syndicate rooms. Furthermore, accommodation is provided for up to 1,500 delegates with over 700 bedrooms with en-suite facilities (York University, online 2003). The University of Warwick's Conference Park utilises the main campus facilities and consists of over 300 meeting rooms, ranging from boardrooms to tiered auditoria, which are fully equipped with the latest technology, such as air conditioned flat floored lecture rooms with tiered seating containing audio-visual systems including projection, DVD and video players. As well as lighting controls, Internet connections and flip charts, the venue has 1,200m^2 of exhibition space, a 1,200 capacity hall and the largest arts centre outside of London. It is considered to house the widest choice of meeting space in the U.K. (Warwick University, online 2003). This demonstrates that educational establishments have large facilities to host large conferences.

Some facilities provided by these educational establishments are vital to the conference, such as laboratory facilities for medical conferences (Pemble, 2002).

They have a professional and business atmosphere, with a strong emphasis on service, which helps delegate's focus (Doyle, 2001), which is necessary for an important business meeting or a conference. This advocates that educational establishments have invested heavily in improving the design of classrooms and lecture theatres, in contrast to Lawson's judgement, which suggested that in the late 1980s, the lecturing facilities "may not be able to meet the standards and flexibility required for conference organisation" (Lawson, 2000, p.159).

A further trend in educational establishment's progress in offering conference facilities has been that numerous educational establishments have built purpose-built venues on campus. The advantage of having a purpose-built venue is that conferences can be held all year around (Rogers, 1998; Lawson, 2000), without being intrusive to the original educational curriculum. Another advantage of locating a conference venue on an educational establishment site is that the conferences can use their leisure / sports facilities and other activities available on campus. Previously, the attractiveness has been the comparatively low cost and value for money (Pemble, 2002); however, today the establishments are heavily investing to appeal to buyers (Doyle, 2001). Often purpose-built conference venues on educational establishment sites have a 'dual role' as they accommodate teaching programmes for intermittent short courses and they are available at other times for professional and management conferences (Rogers, 1998).

4.7 – The characteristics of visitor attractions conference venue

Table 4.6 highlights Leask & Hood's (2000) SWOT analysis of visitor attractions offering conference facilities within a U.K. context. Based on this SWOT analysis, many of the defining characteristics of this venue classification can be seen.

Table 4.6 – A SWOT analysis of visitor attractions offering conference facilities within a U.K. context

STRENGTHS	OPPORTUNITIES
• Unusual venues offer a unique, memorable experience • Quality and friendly service • Novelty value / Buyers demanding something different • Competitively priced • Ability to accommodate small meetings - trend for smaller-sized conferences and increase in corporate conference activity • Growing interest in unusual venues	• Demand for unusual venues is increasing • Conference facilities provide extra funding for property improvements • Conferences generally held during off-peak season therefore additional income for venue • Make contacts with businesses / companies for repeat business
WEAKNESSES	**THREATS**
• Size and range of facilities available such as breakout rooms and dedicated areas • Accessibility of venue not designed for purpose e.g. Britannia • Change to nature of facility may be restricted by Listed Building Regulations • Lack of funds for promotion and marketing of venue as it is secondary nature of business • Lack of accommodation on site • Limited facilities on offer - may have to hire in equipment e.g. technical or catering • No universally agreed terminology which is needed for measuring market activity • Lack of industry knowledge by the venue and staff • Offering a unique experience, once experienced not required again	• Decrease in cost of teleconferencing - not usually provided by unusual venues • Purpose-built venues - geared for conferences - everything on site • Lack of facilities, especially at heritage / historic venues • Volatile nature of customer base - conference expense most likely to be cut from the budget when a recession begins, particularly for the corporate market • Conference market in general not recognised for it's input into the economy, possibly not recognised internally for it's input to revenue • Lack of general conferencing statistics, especially unusual venue data, internal problem if using statistics to argue the development of the facilities • Potential oversupply of unusual venue facilities

(Leask & Hood, 2000, pp33-38)

Unlike other conference classifications discussed, visitor attractions with conference facilities have a unique selling point (Leask & Hood, 2000; Saunders, 2001). "They offer a more creative setting than a standard conference suite…...attractions are usually the first choice for a themed event" (Wills, 2002c, p.38) and "are often more flexible than hotels in terms of access times, theming and decorating" (Saunders, 2001, p.41). They provide so much to do and see, unlike any regular hotel or purpose-built centres (Saunders, ibid).

When visitor attractions are compared with other venues classifications (e.g. purpose-built), it can be seen that they offer a completely different product and experience. In general, they provide small meeting room facilities, with catering services available in-house or contracted in and a limited equipment base offering the basic equipment necessary (e.g. overhead projector (OHP) and flip charts). The duration of events is shorter than the U.K conference average, 1.2 compared to 1.5, which perhaps also reflects on the lack of accommodation offered by many unusual venues and the overall trend towards shorter events (British Tourist Authority*,* 1999). Figures for monthly distribution show that peak months for events were March, April, June and October (Ladkin & Spiller, 2000). These are all months when many of this type of venue are not busy, such as attractions or historic houses, where peak business is July and August. This means the conference business provides opportunities for shoulder month revenue generation, lessening the effects of seasonality (Leask & Hood, 2000).

Despite a measure of growth and success in visitor attractions with regards to offering conference facilities, such venues are not without their disadvantages and conflicts. Such drawbacks were highlighted by Leask & Hood (2000) and Wills (2002c) who identified that the structure of the properties, problems with staff, a lack of breakout rooms, restrictions and inflexibility of actual buildings, lack of up-to-date equipment, lack of staff availability, logistical problems, limited evening entertainment with no amplified music in some venues such as museums and balancing daytime use with conference use are all major drawbacks to offering conferences within visitor attractions.

With regards to the conflict between a venues primary activity and conference use, Gosling (1998, p.47) cites a conference organiser who states “one cannot easily do a large-scale conference at the Natural History Museum…because the museum cannot close to give time and space to setup”. Shallcross (1998, p.B-47) supports this view regarding visitor attraction limitations by stating that “after an initial period of growth, conference business will become limited by venue design and facilities such as the absence of breakout rooms”. If conference organisers wish to undertake a one day conference then they must make the choice between which type of visitor attraction is booked. Museums and historic buildings are open daily, whereas many sporting venues offer conference facilities throughout the day. Chelsea Football Club has more than 12 conference rooms with a maximum capacity of 300 delegates in the Galleria (Archer, 2001). Football stadia are growing in popularity for hosting corporate events due “to the size of the facilities, free on-site car parking, value for money and the peace factor generated by out-of-town locations” (Moore, 2001, p.33).

Very few delegates stay overnight due to the lack of accommodation offered by the majority of visitor attractions. As stated, only eight percent of unusual venue events are residential (British Tourist Authority, 1999). This is changing as many of the larger visitor attractions have identified this concern and have incorporated accommodation into their facilities. Once again, football stadia are one of the first visitor attractions to offer accommodation facilities to their conference delegates, to attract conferences from further a field and from overseas. The vast majority of stadia stand empty and unused for the greater part of any year (John & Sheard, 1997 cited in Leask & Digance, 2001). “However, as with any commercial development today where shareholders (whether public or private) expect a return on their investment, the biggest challenge facing those charged with managing stadia is to make them commercially viable operations” (Leask & Digance, 2001 p.57). For example the Reebok Stadium (Bolton Wanderers Football Club) offers delegates the De Vere Whites hotel, which has 125-rooms and offers group rates of £30 per person per night for bed and breakfast (Bolton Football Club, online 2003).

The uniqueness of the product often promotes the venue to charge inflated prices to host corporate events, such as the Victoria and Albert Museum which charges £10,000 to hire a room with an additional cost of £100 per delegate (Archer, 2001). Conversely, a number of visitor attractions offer exceptionally good value. Many football stadia offer non-residential day rates that are competitive with hotel prices. The rates at Chelsea Village (Chelsea Football Club), located close to the centre of London, start at just £45 per delegate, while Everton Football Club charge from £24 per delegate (Wills, 2002d). This same sense of uniqueness also produces rapidly declining returns (Davidson & Cope, 2003). Where visitor attractions are used for conferences on the basis that it will be a surprise and a memorable occasion, organisers are unlikely to return to the same venue for many years to come. Thus without the reliance upon repeat visitations such venues must constantly widen their marketing mix to attract new clients. Visitor attractions are frequently seen as 'one off locations' (Leask and Hood, 2000).

4.8 – A summary of Chapter Four

This chapter has identified that although many destinations have introduced conference venues and as such the true size of the conference sector is difficult to establish. What is certain is that this sector should not be considered homogeneous (Pearce 1989; Weirich, 1992; Montgomery & Strick, 1995; McCabe et al, 2000; Rogers, 2003). A number of typologies have been forwarded by authors to classify the conference sector. A review of six author's typologies forwarded since 1992 has highlighted that the selected typologies are often confusing with no clear differentiation between some of the categories used and unnecessarily protracted through the use of sub divisions. In response to these criticisms, this research has forwarded a more appropriate typology consisting of four classifications to categorise the modern U.K. conference sector. These categories are based solely upon and the nature of the venue and are;

1. Purpose-built conference venues.
2. Hotels with conference venues.
3. Educational establishments with conference venues.
4. Visitor attractions with conference venues.

These classifications are significant to this research in that a questionnaire will be designed for each of these specific classifications. Overall this chapter has responded to Objective and Hypothesis One, identifying that current classifications are not an appropriate way of segmenting venue supply. This chapter continued by detailing the characteristics of each of these four classifications, which are summarised in Table 4.7.

Table 4.7 – A summary of conference venue characteristics

Venue Classification	Characteristics
Purpose-built	• Focused on the specific requirements of conferences rather than tourist travel • All meeting functions can be held under one roof • Host the largest conferences with extensive space provided to cater for conferences where delegate numbers may run to several thousands • Purpose-built venues are very adaptable and flexible, offering a full range of hall sizes for meetings, often two auditoria, banquets and functions, along with numerous meetings or breakout rooms • Well-equipped with modern audio-visual-equipment • Offers on-premises business and telecommunications services and provides guests with access to computers, fax machines and other equipment • Typically employ professionally trained conference staff • Often constructed and operated using public funding, and they are often municipally owned. The management of such venues is a combination of public / private sector partnerships • Often local authorities intervene to subsidise the running

	costs of the venue, as it is rare that revenue exceeds costs. • Purpose-built venues are often used as a tool for revitalisation of blighted areas and created as a centrepiece to enhance an urban centre. • Purpose-built venues are often situated in central location which is an advantage of attracting conferences to a destination. • The majority of purpose-built venues do not offered on site overnight accommodation to delegates, relying on local hotel accommodation. • Dedicated residential conference centres are specifically built conference facilities with residential facilities free from the distraction of general tourists.
Hotels	• Hotels dominate the supply of conference facilities, accounting for two-thirds of all conference venues in the U.K • Characterised by staff trained specifically in conference products. • Where overnight accommodation is required, delegates remain in a single place not only for the conference location and accommodation, but also catering and leisure activities • Conference organisers are also able to negotiate favourable rates for this type of venue with respect to the whole meeting package (Lawson, 2000). • Centrally located hotels have good transport access, but this often restricts the size of venue. • Medium-sized suburban hotels are smaller than city centre business hotels in both the number of delegates catered for (meeting rooms for between 25 and 100 delegates). Within easy reach of the destination's centre and major road junctions (Law, 1993). • Resort hotels attracts the largest number of delegates (McCabe, 2002). Located close to the resort centre as well as the local attractions, such as golf course. • Airport hotels located in close proximity to airport terminals, as well as having easy access to the destinations centre and public transport for the region. Airport hotels charge high prices for their conference product due to their

	prime location of their venue (McCabe, 2002). Focus on the corporate business traveller. • Country or rural hotels attract the smallest number of delegates, with between 80 and 120 guestrooms and attracts exclusive corporate meetings They are characterised as being in remote locations are often situated in spacious grounds, with a golf course either on site or within close proximity to it. • Trans-national (chain) hotel groups (Go & Pine, 1995) provide a high quality services under a brand clearly recognised by customers. They have the ability to respond quickly to new or changing market conditions. Considerable organisational and managerial economies that enable good standards of service to be provided. Availability of global travel reservations systems.
Educational Establishments	• Educational Establishments are built with 'learning spaces', such auditoria, lecture theatres and classrooms are all suited to conference activity (Davidson & Cope, 2003) offering a large number of break-out rooms • Educational Establishments offer practical conference rooms and good quality and up-to-date audio-visual equipment • During student vacations Educational Establishments can be utilised along with accommodation that is traditionally provided for students during term-time, however, vacations usually do not match the conference season. Quality of student accommodation, which is offset by other economic criteria and is often inadequate for more mature business visitors. • Accommodation being comprised of single dwelling rooms of limited space, with communal washing facilities, although most university accommodation possess a hand basin in each room (Paine, 1993). • Large accommodation stock. This is attractive for large association conferences, which need to accommodate large numbers of delegates (Lawson, 2000). • Located centrally to a destination, or located on its outskirts, with major trunk roads and/or motorway access (Paine, 1993). • Educational establishments "generate much lower revenue per delegate per day than venues such as hotels, but delegate

	volumes tends to be higher" (Shallcross, 1998, p.B-46) • Conferences held in educational establishments tend to have a strong academic orientation and membership, with scientific and cultural subjects predominant. • Traditionally, universities have succeeded best in two niche markets: high attendance, low budget conferences and the smaller training and management seminar type of events (Davidson, 1998). • The popularity of educational establishments as conference venues is rising. • Educational establishments have built purpose-built venues on campus. The advantage of having a purpose-built venue is that conferences can be held all year around
Visitor Attractions	• Visitor Attractions have the greatest diversity within venue classifications. • Such venues have either adapted or added to existing facilities in order to offer meeting facilities to subsidise income for the upkeep of the building or generate additional revenue • Unusual venues offer a unique, novel value, memorable experience. Buyers demanding something different • Competitively priced • Ability to accommodate small meetings - trend for smaller-sized conferences and increase in corporate conference activity • Growing interest in unusual venues • Size and range of facilities available such as breakout rooms and dedicated areas • Accessibility of venue often not designed for conferences • Change to nature of facility may be restricted by Listed Building Regulations • Lack of funds for promotion and marketing of venue as it is secondary nature of business • Lack of accommodation on site and often limited facilities offered, may hire in equipment e.g. technical or catering

	• Lack of industry knowledge by the venue and staff • Offering a unique experience, once experienced not required again • Demand for unusual venues is increasing • Conference facilities provide extra funding for property improvements • Conferences generally held during off-peak season therefore additional income for venue • Difficult to gain repeat business • The uniqueness of the product often promotes the venue to charge inflated prices to host corporate events • Thus without the reliance upon repeat visitations such venues must constantly widen their marketing mix to attract new clients. Visitor attractions are frequently seen as 'one off locations' (Leask and Hood, 2000).

Purpose-built venues are, as their name suggests, intentionally designed to match the demands of the conference delegate. Such venues offer large conference space which can cater for many thousands of delegates, although small conferences can also be catered for, thus flexibility is a key characteristic of this venue classification (Rogers, 1998; Medhurst, 2000). Purpose-built venues also provide modern audio-visual equipment for delegates' use, along side additional business and communication facilities, such as fax machines, all of which are supported by trained conference staff (Foster, 1994; Lawson, 1996; Shallcross, 1998). The majority of such venues are publicly funded and often operate at a loss. The rationale for constructing purpose-built venues goes beyond traditional project-cost feasibility analysis to incorporate wider economic, social and environmental issues. Such wider issues include the rejuvenation of a destination central district thus many purpose-built venues are located close to a destination's centre, with good accessibility to transport networks also a key feature. Traditionally these venues do not offer on-site accommodation, relying on local accommodation providers in close proximity to the venue. Due to their central location, ease of access and in order that a venue maximises its revenue streams, many conference venues are in reality multi-purpose buildings (Davidson & Cope, 2003). In recent years there has been a trend towards the provision of dedicated residential conference centres. These centres offer dedicated conference facilities and accommodation, although the accommodation is solely for conference delegates thus focusing on their needs. Such dedicated centres also mix business and leisure with the provision of leisure pursuits such as golfing ranges and swimming facilities (Wyboston Lakes, 2003).

Hotels have improved their conference product over recent decades (Davidson, 1998). Many now offer a conference 'one stop shop', including specialist marketing, trained staff, accommodation, catering and leisure facilities. However, hotels are characterised by smaller less flexible conference space, thus such venues are able to cater for many hundreds of delegates rather than the many thousands of delegates catered for by purpose-built venues. Hotels can also be sub-divided by their characteristics and Table 4.5 details the five differing hotels types and their characteristics.

Overall educational establishments are suited to the conference market as they are built with learning spaces (Davidson & Cope, 2003). They are often located in a destination's centre with good access to transport links and provide a large accommodation stock. However, educational establishments have traditionally been seen in a negative light, due to the lower standard of accommodation facilities a focus on conferences with a strong academic content and the fact that the availability of educational resources do not align with the conference season.

Overall visitor attractions which offer conference facilities provide a unique experience, which the availability of such resources aligns well with the peak conference periods. However, there are many drawbacks that blight such venues. Many suffer conflicts of use between their primary business activity and conference use (Gosling, 1998; Shallcross, 1998). Their meeting capacities are smaller than the other venue classifications discussed, as such visitor attractions can often only cater for small conference sizes. The audio-visual equipment provided is limited and it is common that no overnight accommodation is provided to delegates (Leask & Hood, 2000). Although the uniqueness of the venue is the predominant marketing tool, such uniqueness has led some venues to charge high prices (Archer, 2001). This uniqueness also creates issues of diminishing returns (Davidson & Cope, 2003), where delegates do not return on an annual basis as the original conference has reduced the uniqueness of the venue. As such conference organisers seek new venues with their own unique characteristics. This single typology which draws from existing typologies / classifications to form four classifications which are most appropriate to the U.K. conference sector at the start of the 21st century will be used within this research.

CHAPTER FIVE – SERVICE QUALITY AND THE IMPORTANCE OF VENUE SELECTION ATTRIBUTES

5.1 – Introduction

Chapter Three identified that many U.K. destinations facing decline in their tourism lifecycle desire the benefits of conference tourism, which can be offered to both its residents and business community. “The attractiveness of convention tourism has spurred destinations to proactively pursue the conference market” (Crouch & Weber, 2002, p.57). This has resulted in an escalation in the building or expansion of conference venues and facilities not only within the U.K., but worldwide. There is an intensified incidence of venues competing in this sector (Robinson & Callan, 2001). The intensity of this competition naturally gives rise to interest in the types and ranges of factors that underlie the conference venue selection process employed by conference organisers and delegates (Crouch & Louviere, 2004). Venue selection is encompassed within the theories of service quality, which have been a significant preoccupation of the hospitality sector throughout the 1980s and 1990s (Johns, 1996).

This chapter examines rejuvenation not from a destination perspective, but focusing on individual conference venues. The chapter identifies the developing role of service and service quality within the U.K. conference venues, providing definitions and highlighting a theoretical model which has been used to measure service quality. This chapter also focuses on the role of conference venue selection attributes. These attributes act as a means of differentiating between venues and stimulating demand in an ever increasingly competitive U.K. conference sector. Finally this chapter highlights the role that refurbishment plays in the provision of service quality, identifying that refurbishment, when viewed as the rejuvenation of a venue, should not be seen as merely a means of both introducing and increasing service quality. It should also be considered as the primary means by which venues either initiate new lifecycles or extent their current lifecycle.

5.2 – Service and service quality

The study of service quality within business management has been undertaken for decades (Skalpe & Sandvik, 2002) because the market is now more competitive and marketing management has changed its focus from internal performance i.e. production, to external interests such as satisfaction and customers' perception of service quality (Gronroos, 1992). The concept of service comes from business literature, with many definitions of service being forwarded (Chang, Chen & Hsu, 2002). Gronroos (1990, p.27) stated that;

> A service is an activity or series of activities of more or less intangible nature that normally, but not necessarily, take place in interactions between the customer and service employees and / or systems of the service provider, which are provided as solutions to customer problems.

Whereas Ramaswamy (1996, p.3) described a service as "the business transactions that take place between a donor (service provider) and receiver (customer) in order to produce an outcome that satisfies the customer". Finally, Zeithaml & Bitner (1996, p.5) defined service as "deeds, processes, and performances".

Having reviewed definitions of service Yong (2000) identified three features of service that aid better understanding of the concept;

- First, service is a performance, interacting between consumers and service providers (Deighton, 1992; Gronroos, 1990; Ramaswamy, 1996; Sasser, Olsen, & Wyckoff, 1978; Zeithaml & Bitner, 1996).
- Second, other factors, including physical resources and environments are mediators in the process of service production and consumption (American Marketing Association, 1960; Collier, 1994; Gronnroos, 1990).
- Third, service is required by consumers to undertake functions including problem-solving (Gronroos, 1990; Ramaswamy, 1996).

These points when combined lead to the conclusion that, "a service, combined with goods products, is experienced and evaluated by customers who have particular goals and motivations for consumers for consuming the service" (Yong, p.43).

Quality within a service environment can be viewed from a number of differing approaches (Hope & Muhlemann, 1998). Although "there is no universal, parsimonious, or all-encompassing definition or model of quality" (Reeves & Bednar (1994, p. 436), the most commonly used definitions consider quality as the customer's perception of service excellence. Where quality is defined by the customer's impression of the service provided (Berry, Parasuraman, & Zeithaml, 1988; Parasuraman, Zeithaml, & Berry, 1985) and also Bitner & Hubbert (1994, p.77) defined quality as "the consumer's overall impression of the relative inferiority/superiority of the organization and its services".

One of the best known theoretical approaches to service quality can be seen in the work of Parasuraman, Zeithaml & Berry (1985), who formulated the ‘gap model’. This model forwarded the view that five ‘gaps’ may exist between expected service and the perceived quality of the service received by the consumer, which could lead to the reduction in service quality. These gaps are;

- Between management perceptions of consumer's expectations and expected service.
- Between management perceptions of consumer's expectations and the translation of perceptions into service quality specification.
- Between translation of perceptions of service quality specification and service delivery.
- Between service delivery and external communications to consumers.
- Between the customers’s expected level of service and the actual service performance.

  (cited in Hope & Muhlemann, 1998, p.368, Chang, Chen & Hsu, 2002, p43).

Additionally, Parasuraman, Zeithaml & Berry forwarded the ten second-order dimensions that they proposed were used by consumers in assessing service quality in a broad variety of service sectors: tangibles, reliability, responsiveness, competence, courtesy, credibility, security, access, communication, understanding (Parasuraman Zeithaml & Berry, 1985). Using these ten dimensions, Parasuraman, Zeithaml & Berry (1988) made the first efforts to operationalise the concept of service quality through the assessment of service quality that empirically linked the difference in scores between expectations and perceived performance. The questionnaire consisted of 22 items divided across the ten second-order dimensions listed above. Each response was measured on a seven-point answer scale to test the strength of relations. These 22 items were used to represent five dimensions: Reliability, Responsiveness, Tangibles, Assurance, and Empathy. An example of each can be seen in Table 5.1.

Table 5.1 – The five SERVQUAL attribute categories

Designation	Examples
Tangibles	Appearance of personnel, facilities and equipment
Reliability	Timeliness, error free records, service right first time
Responsiveness	Communication promptness, helpfulness
Assurance	Confidence, security, courtesy, knowledge
Empathy	Individual attention, convenience, specific needs

Source: Parasuraman, Zeithaml & Berry, 1991, cited in Johns, 1996, p.14

SERQUAL measured service quality as a gap between expectation and perception within an appliance repair and maintenance firm, several retail banks, a long-distance telephone provider, a securities broker, and credit card companies (Parasuraman Zeithaml & Berry, 1988). This study provided a comprehensive conceptualization of service quality with an instrument to measure perceived service quality for the first time in service quality studies. It became very popular among service quality researchers. SERVQUAL has been widely used to measure perceptions of service quality (Fick & Ritchie, 1991; Coyle & Dale, 1993; Knutson et al, 1995; Martin, 1995; Stevens et al, 1995).

However, SERQUAL is not without its critics. Brown, Churchill, & Peter (1993) stated that the difference in scores causes problems with reliability, discriminate validity, spurious correlations and variance restriction. Cronin and Taylor (1992) argued that SERVQUAL was inappropriate for measuring perceived service quality as it measures customer satisfaction not service quality.

Other researchers have attempted to create models of service quality. In comparison to the multi dimensional approach adopted by Parasuraman Zeithaml & Berry, (1988), Gronroos (1984) used a two-dimensional model to study service quality, with Technical Quality being the first dimension. This refers to the outcome of the service performance. Functional Quality is the second dimension and refers to the subjective perception of how the service is delivered. Gronroos stated that these two dimensions of service performance should be compared to the customer's expectations and ultimately to the customer own service quality perception. McDougall & Levesque (1994) extended Gronroos model, adding a third dimension - physical environment. The proposed Three Factor Model of Service Quality consists of service outcome, service process (Gronroos 1984), and physical environment. The model was tested by a confirmatory factor analysis using the dimensions of the SERVQUAL scale, which provided empirical support for the model.

Not only have theories to define service quality been forwarded, but the expected relationships between quality and variables such as costs, sales growth, productivity, return on investment, price, customer satisfaction and loyalty. All of which have been the foundation for the development of theories and hypotheses in current research (Andersen & Fornell, 2000). Such research has identified that approximately 70% of identifiable factors explaining why customers move from one service provider to another, relate to dissatisfaction with the service experience (Whitely, 1991). Additionally, estimates show that the cost of poor quality to the service sector is approximately 30% of gross sales (Tally, 1991).

Service quality is defined as a measure of how well the service delivered meets customer’s expectations (Lewis & Booms, 1983; Gronroos, 1984). It is also seen as confirming the requirements of customers, to meet their expectations and to satisfy them (Deming, 1982). The term ‘expectations’ is used within these definitions of service quality. Expectations are seen as reference points against which the performance of customer-satisfying behaviours by the service provider, including that of a conference venue provider, is judged by the service consumer (Parasuraman et al, 1991). For any business, including conference venues, that strives for longevity and an expansion of its market share, the fundamental principle in achieving service quality is to manage those customer-satisfying behaviours that are both specific and measurable (McCleary & Weaver, 1982; Peters & Waterman, 1982).

With reference to the conference sector, one aspect intrinsically linked to service quality is that of customer satisfaction (Zeithaml & Bitner, 1996). The quality of the conference product is reflected in the level of customer satisfaction and thus customer satisfaction can be used as an indicator of quality (Troye, Ogaard & Henjesand, 1995). Customer satisfaction is achieved through the provision of a quality product and a quality product is perceived to be in existence when the supplier meets the customers' expectations. This viewpoint extends the findings of other authors, namely Shetty & Ross (1985), Deming, (1986), King (1987), Headley & Choi, (1992), Culp et al (1993) and Yang (2003) who state that to understand the performance of service quality, firms must first examine whether the service provided will meet customers requirements and expectations. Therefore firms should focus on the following issues;

- Knowing the customers' requirements, especially those quality attributes considered to be important by customers (Deming, 1986; Headley & Choi, 1992).
- Fulfilling customers' requirements on quality attributes as much as possible, especially those that are considered important by customers.
- Investigating where the service performed is satisfactory to customers and where it is not.
- Taking appropriate action to correct or improve service in cases where quality is poor. (cited in Yang, 2003 p.310)

The above four issues are key with regards to the recognition of customers' expectations within the conference sector. Awareness of customers' expectations and the measurement of service quality, are both fundamental issues to any organization (Deming, 1986; King, 1987; Headley & Choi, 1992). Such expectations within the venue selection process stem from selecting the most appropriate venue for the delegates needs. An understanding of the venue's quality attributes demanded by the conference organiser within their venue selection criteria is essential, if conference service providers are to achieve and maintain service quality.

5.3 – Conference venue selection criteria

The focus of literature relating to conference venue selection attributes is split between two areas of interest. The first is the identification of such selection attributes (Alkjaer, 1976; Pizam & Manning, 1982; Var, Cesario & Mauser et al, 1985; Chon, 1991; Usher, 1991; Hiller, 1995; Benini, 1997; Oppermann & Chon, 1997; Chacko & Fenich, 2000; Robinson & Callan, 2001) and secondly the identification of which attributes play an important role in the selection process (Meetings Industry Association, 2000; Crouch & Weber, 2002; Dolnicar, 2002; Robinson & Callan, 2002; 2003; Crouch & Louviere, 2004).

Robinson & Callan (2001) reviewed previous empirical research studies on selection attributes, these included Reneghan & Kay (1987), Oberoi (1989), Oberoi & Hales (1990), Riley & Perogiannis (1990), Callan (1994) and Callan & Grayson (1997). Additionally, only two articles were identified which focused solely on the conference product, however, these were written by U.S. authors, Shaw, Lewis & Khorey (1991), Bonn, Brand & Ohlin (1994). Robinson & Callan (2001), in their pilot study, identified 76 attributes based on these previous research studies, to which they added five new attributes. These are;

- Additional social activities
- Clearly signed fire exits and routes
- Courtesy transport
- Disabled access and facilities
- Lounge / office for conference organisers (Robinson & Callan, 2001, p.75)

Additionally, Crouch & Ritchie (1998) reviewed 64 studies concerning conference site selection attributes. From this review it was established that limited empirical efforts had been undertaken with regards this subject. Instead much of the information concerning site selection was based on opinions, anecdotal evidence, reviews and conceptual studies (Crouch & Weber, 2002; Crouch & Louviere, 2004). Crouch & Ritchie's (1998) review did however, identify eight over-arching site selection factors, these being accessibility, local support, extra-conference opportunities, accommodation facilities, meeting facilities, information, site environment and other criteria, which are shown in Figure 5.1.

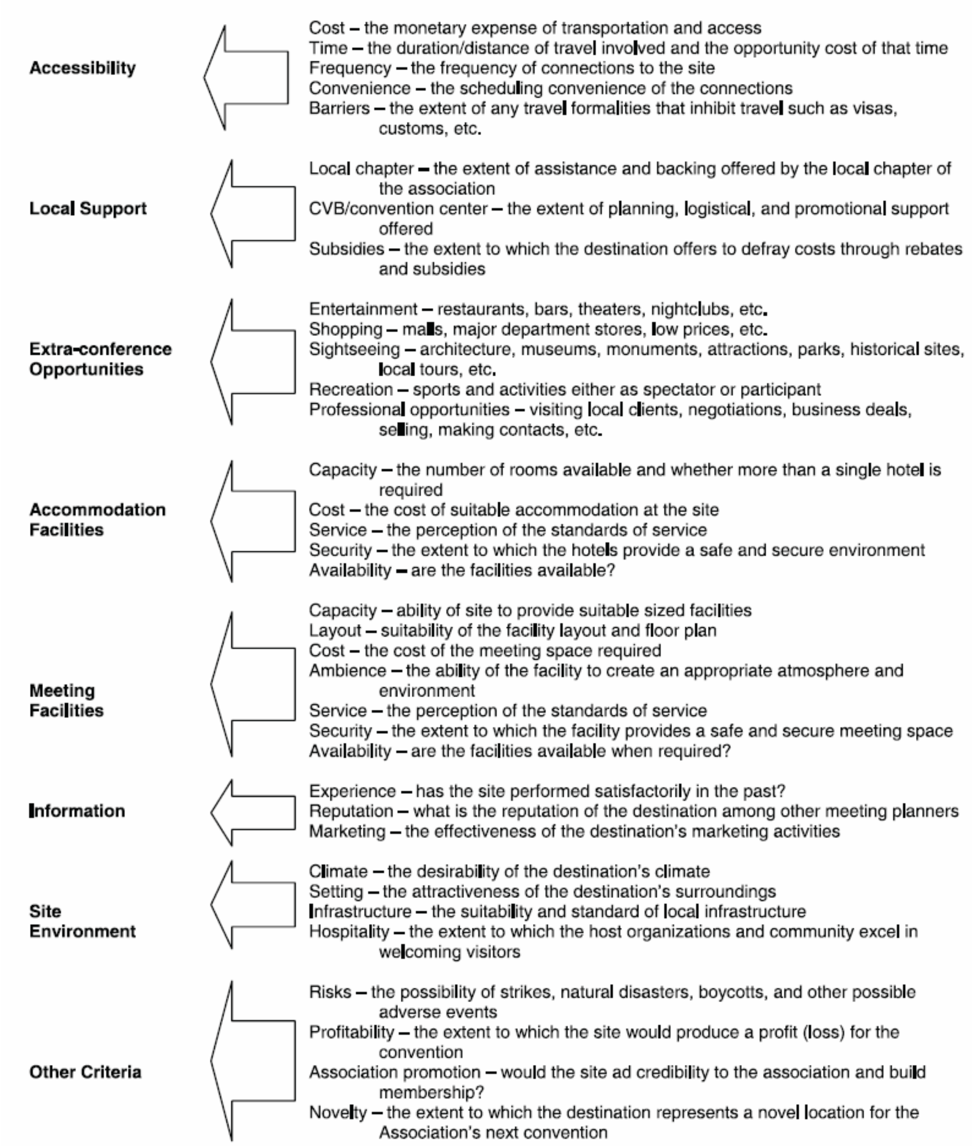


Figure 5.1 – Conference site selection factors

Source: Crouch & Ritchie, 1998, cited in Crouch & Louviere, 2004, p.120

Figure 5.1 also shows that each factor was sub-divided along several dimensions, for instance accessibility was divided by cost, time, frequency, convenience and barriers. In total 36 conference destinations attributes were identified, which the authors hypothesised as governing the choice of conference organisers through a three stage process (1) conference preplanning (2) site selection analysis and (3) site selection decisions.

Such destination selection attributes have been used in subsequent research (Meetings Industry Association, 2000; Dolnicar, 2002; Crouch & Weber, 2002; Robinson & Callan, 2001, 2002, 2003a, 2003b, 2005; Crouch & Louviere, 2004) to identify which attributes play a pivotal role in the destination selection process. Meetings Industry Association (2000) focused on the differences between corporate and association conference planners, identifying that corporate conference planners demand a high quality venue, whereas associations focus on value for money.

The Meeting Industry Association (ibid) study also identified similarities between the corporate and association conference planners. Both demand a full range of conference capacities and flexibility within the venue itself. Greenhill (2000) supports this view by highlighting that the presence of a purpose-built conference centre offering facilities of a suitable size will sway an association's decision to run their conference in a particular destination. Additionally, Greenhill identifies that a high level of service is also demanded by both corporate and association conference planners. This includes the staff's ability to provide accurate information and draw on excellent organizational skills. Additionally, the quality of bedrooms was also similarly ranked (Meeting Industry Association, 2000).

Not only are the venues service quality attributes central to the venue selection process, but also the destinations attributes. Inskeep (1991) draws attention to a range of destination attributes demanded by conference organisers. These are;

- Central location, with access to local hotels and intercity transportation for domestic delegates.
- In close proximity to major shopping or regional business district.
- Availability of vehicle parking facilities.
- In close proximity to recreation facilities and attractive surroundings.

(Cited in Davidson & Cope 2003. p.109)

This latter point is supported by Qu & Li (1999) who highlight that by providing a flexible, attractive conference product supplemented by opportunities to relax and enjoy the destination will lead to a successful conference. Oberoi (1987, p46) identified a range of conference room characteristics as being important, these are;

- A selection of room available.
- Natural daylight, but blackout facilities available.
- Not South facing.
- Adequate heating and cooling.
- Lighting and sound has to be good.

A survey of association organised conferences by Crouch & Louviere (2004) further supports this view. In their study, Crouch & Louviere (2004) examined the extent to which 20 different conference site attributes exert influence on the selection of a host destination for a conference. Their research identified that the attractiveness of a venue was related to both its cost and its proximity to conference participants. The ability of the venue to accommodate delegates on-site (i.e., in a hotel integrated with the conference venue) versus off-site (i.e., in other separate hotels) is also viewed as an important consideration. Venues are more attractive to conference planners when the majority or all of the delegates can be located in an integrated conference / accommodation facility. Associated with this ability to accommodate delegates is the room rate charged for accommodation, with venue attractiveness declining as these rates increase. The quality of a site's conference and break-out rooms are all highly significant, as is the availability of on-site audio-visual equipment and systems (Crouch & Louviere, ibid).

Additionally, sites offering opportunities for shopping, entertainment, recreation, sightseeing and organised tours or that provides unique physical, social and/or cultural settings have significant advantages. Thus research by Crouch & Louviere (2004) identifies that conference venue characteristics play an important role in venue selection, an attractive host destination must offer strengths across a broad range of other factors to succeed in an ever more competitive environment.

In relation to service quality attributes, Robinson & Callan (2003; 2005) questioned both corporate and association delegates. Both the empirical research papers presented by Robinson & Callan (2003; 2005) use the same survey of 547 conference delegates undertaken during April and May 1999. Using 81 service quality attributes, with delegates being asked how important these service quality attributes were in the selection of a conference venue. The 81 service quality attributes were grouped into ten subsets and the mean of each subset identified, which is shown in Table 5.2.

From Table 5.2 the subsets ‘competence’, which contains six factors, ‘tangibles - other’, which contains three factors, and ‘service providers’, which contains 12 factors, can be identified as the three most important subsets, with over 95%, 92% and 83% of delegates rating factors in these sub-groups as important or above respectively. Within the ‘competence’ subset, venue and service attributes such as arrangements carried out as instructed, efficient check in and out along with efficient billing procedures are grouped. Within the category of ‘tangibles - other’ as shown in Table 5.2, the ambience of the venue and food quality are grouped. Finally the subset of ‘Service Providers’ contains attributes including adaptable, dependable and competent staff along with the availability of an experienced conference manager (Robinson & Callan, 2003b; 2005).

Table 5.2 – Mean level of importance by subset of attributes

Attribute subset (brackets indicate number of factor in subset)	Mean importance (%)	Ranking
Competence (six factors)	95	1
Tangibles – Other (three factors)	92	2
Service Providers (12 factors)	83	3
Price / Value (seven factors)	81	4
Tangibles – Bedrooms (five factors)	79	5
Meeting Room Tangibles (16 factors)	77	6
Access (seven factors)	71	7
Additional Services (10 factors)	58	8
Leisure Facilities (three factors)	46	9 =
Location & Image (12 factors)	46	9 =

Source: Robinson & Callan, 2003b, p.255; 2005, p.92
N= 547 conference delegates
Percentages = number of delegates indicating important, very important or extremely important

These findings support the findings of the Meetings Industry Association (2000) research, which also found a high level of service is demanded by both corporate and association conference planners. However, in contrast to Robinson & Callan's (2003) findings which identified that the quality of human resources (i.e. the competence of venue staff) was the principle factor in venue selection, research by Weber & Chon (2002, p.211) which utilised a Delphi model, identified key issues concerning human resources. These were

- A lack of skilled human resources in the industry.
- Low rates of pay compared to other service industries.
- A need for improved educational and training of staff.
- A need for better terms and conditions of employment for staff that would attract and retain higher quality of staff.
- A need to create a career structure and professional status.

These author's identified that as part of the lack of education and training of U.K. staff, the lack of foreign language expertise was noted as reducing the attractiveness of U.K. venues in relation to international conferences. The areas of concern identified above are clearly interrelated, and although not directly a concern to the conference organiser and delegates, the overall effect of these factors within the conference sector results in a decreasing level of service quality offered by venues to their conference customers (Weber & Chon, ibid), the very factor that Robinson & Callan (2003) identified as being the principle factor in the venue selection process.

From Table 5.2 the least importance attributes in site selection were viewed as 'Leisure Facilities' and 'Location & Image', both with 46% of delegates ranking them as important, very important or extremely important. Thus, Robinson & Callan (2003) contrast with Crouch & Louviere's (2004) research which viewed the wider host destination as being important within the overall appeal of a venue. However, grouping attributes into subsets does mask the significance of individual attributes. Within the 'location & image' subset, accessible road links were viewed as important, very important or extremely important by 87.8% of delegates and a good standard of décor and facilities by 85%. However, only 31% and 40% of respondents rated the venue belonging to a group or chain and nightlife nearby as either important, very important or extremely important. These low levels of support for these latter attributes create a low average value across the subset.

This review of recent empirical based studies of site selection criteria highlights the critical importance of venue suppliers to the quality of the conference experience (Robinson & Callan, 2003a). Although not ranked as the most desired attribute, a common attribute highlighted within the research discussed is that of delegate accommodation. Crouch & Ritchie (1998) viewed accommodation facilities as one of their eight over-arching site selection factors, sub-dividing it into capacity, cost, service, security and availability (refer to Figure 5.1). Both corporate and association conference planner cited similar levels of support for the quality of bedrooms within the Meetings Industry Association (2000) research. The ability of the venue to accommodate delegates on-site is also viewed as an important consideration (Crouch & Louviere, 2004), with 90% of delegates viewing this as either important, very important or extremely important. While 87% of respondents viewed comfortable en-suite bedrooms as either important, very important or extremely important (Robinson & Callan, 2003b). Service quality provided by accommodation providers can be measured through classification and grading schemes.

5.4 – Hotel classification and grading schemes

Accommodation within the U.K. can be categorised based upon a number of defined and measurable characteristics, such as the proportion of bedrooms with en-suite facilities, the size of the bedrooms and the provision of room service. This is expressed as a rating (Lundberg 1984, cited in Law 1993). Such categorisations are offered by a range of organisations such as National Tourist Boards (NTBs), automotive organisations (Automobile Association (AA) & Royal Automotive Club (RAC) and organisations who specifically classify accommodation (Egon Ronay & Michelin) (Callan, 1995). In grading accommodation, the service quality offered by one hotel can be compared to others, although each different organisation uses their own terminology to express the classifications used. These are shown in Table 5.3. It should be noted that not all ratings presented in Table 5.3 remain valid in 2005, as such NTB crowns and Which are now obsolete. Ratings have increasing influence on venue selection decisions, particularly within the corporate sector (English Tourism Council (ETC) 2000).

In his research, Callan (1995) identified that approximately two-thirds of users staying in three, four or five star (or equivalent grades) hotels employ a grading scheme within their accommodation selection process, although such grading schemes are not the primary means of selecting accommodation. Indeed, of the 166 attributes used by Callan (1995) within his research, business users of hotels ranked the use of grading stars within their selection process as 109th and crowns as 118th. The most widely used grading schemes are that of the AA and RAC, having a 62.3% and 38.4% usage respectively (Callan, ibid).

Table 5.3 – Categories and equivalence of grading schemes

Category Two	AA – Two Star RAC – Two Star NTB – Three Crowns Michelin – One Pavilion Egon Ronay –Grade Two Which – Listed Entry	Category Four	AA – Four Star RAC – Four Star NTB – Five Crowns Michelin – Three Pavilions Which – Good Food/Value
Category Three	AA – Three Star RAC – Three Star NTB – Four Crowns Michelin – Two Pavilions Egon Ronay – Grade Two Which – Good Food/ Value	Category Five	AA – Five Star RAC – Five Star Michelin – Four/Five Pavilions Egon Ronay – Deluxe

Source: Callan, 1995, pp.275-276

A relatively recent advance in grading schemes has been the development of accreditation schemes for conference facilities. In 2003 the Wales Tourist Board initiated the Business Class accreditation scheme, which awards Platinum, Gold Silver grading's to venues meeting facilities thus informing potential conference organiser of the venue standards, and thus offering comparisons to be made. In total, since its launch up to July 2004, 75 venues have been awarded one of the three classifications (Business Tourism Partnership, 2004). Additionally, the Meeting Industry Association has introduced the Hospitality Assured Meetings standard for service excellence for the meeting venues. External assessment and customer evaluation are used to assess an organisations achievements, and thus indicated to conference organisers those venues that where service experience is guaranteed. For venues such accreditation provides a competitive advantage not only nationally but also internationally (Business Tourism Partnership, ibid).

5.5 – Hotel service quality expectations and disappointments amongst business travellers

There have been many studies specifically examining business travellers' expectations and disappointments of hotel service quality (Dolnicar, 2002).

Lewis (1984b) identified 'location', 'price', 'level of service', 'food quality' and 'cleanliness' as the five quality attributes used to select an appropriate hotel. These findings regarding the level of service and cleanliness are complimented by the work of Oberoi & Hales (1990).

In their study Oberoi & Hales (1990) interviewed 30 corporate conference organisers to identify venue selection criteria for hotels. These interviews identified 57 attributes covering facilities offered, catering, pricing and activities. A questionnaire containing these venue selection attributes was distributed to *The Times* Top 1000 Companies, requesting that the conference organiser in each organisation rank each attribute in terms of its influence in the venue selection process. A value of four indicating that it played a significant role in the selection process and one indicating a less significant role in the process. Based upon the 45.7% response rate 'Staff carrying out arrangements as requested', 'Dependable staff', 'Competent staff', and 'Cleanliness' were ranked as the top four hotel attributes considered by business travellers in their venue selection process.

Once Oberoi & Hales (ibid) had identified which attributes were significant in the venue selection process and which were not viewed as significant, they sought to investigate the perceived performance of the actual hotel service product. In order to achieve this Oberoi & Hales distributed a second questionnaire to 390 hotel conference users, with 133 returns (34.1% response rate). Respondent was asked to rank the attributes using a five-point scale, where one indicated the factor was much worse than expected and five indicating where the factor was much better than expected. Those factors identified as being much worse than expected by hotel business users include comfortable seating, attentive management and leisure facilities. Those factors viewed as being better than expected by hotel business included quality of food, politeness of staff as well as ambience and atmosphere.

Additionally, Weaver & Oh (1993) who questioned 3,187 business travellers of which 433 usable responses were obtained. Over 56 hotel attributes were listed for respondents to grade between one and five, where one equates to very unimportant and five to very important. Average responses were obtained for these 56 attributes, any attribute that received an average ranking of 3.5 or higher was considered as very important, while those receiving an average ranking of 2.5 or less were deemed unimportant, hence those over 2.5 and below 3.5 were deemed neither important nor unimportant. Overall, Weaver & Oh (ibid) identified 18 factors that had an average ranking of 3.5 or more which determined hotel choice, these included ‘convenience for the business’, ‘good reputation’, ‘friendly staff’, ‘cleanliness’ and ‘safety and security facilities’. In their study of 433 business travellers, McCleary, Weaver & Hutchinson (ibid) classified the 56 hotel attributes identified by Weaver & Oh (1993) into seven subsets, namely;

1. Basic product
2. Business service
3. Banqueting / Meeting facilities
4. Frequent traveller programs
5. Advertising / Public relations
6. Convenient location
7. No-smoking rooms

Of these factors McCleary, Weaver & Hutchinson (1993) identified just one factor that of ‘convenient location’, defined as the conference venues geographical location to the delegates business and to an airport, which strongly influenced hotel selection. Overall, “functional attributes major contributors to the overall quality as perceived by consumers” (Oberoi & Hales, 1990, p.719).

Extending the research to incorporate the attributes that create value during a guests’ stay, Dube & Renaghan (2000) identify ‘guest room design’, ‘physical property’, ‘service (interpersonal)’, ‘service (functional)’ and ‘food and beverage related services’ as those factor that create value to a guests stay within a hotel. Other research that examined value criteria is that of Williams & Teare (1990), who identified client perspectives on hotel conference facilities. Their research highlighted that conference organisers choose hotel conference venues that provide conference package prices that are fully inclusive with no hidden extras, such as rental charges for audio-visual equipment and catering. Additionally, they identified that conference organisers expect hoteliers to provide guidance on in-house conference planning and organisation, including face to face meetings with hotel conference managers at the planning stage. Overall Williams & Teare (ibid, pii) state that "Effective conference packaging, a reputation for attention to detail and an understanding of the needs and dynamics of in-house conference management are … valuable assets in building market share"

Based upon these previous research findings, three hotel service quality attributes are repeatedly cited as influencing the selection process, that of 'location', 'reputation' and 'value for money' (Dolnicar, 2002). A study by Dolnicar (2002) specifically examined the service quality expectations and disappointments of 195 business travellers staying in hotels with a range of quality classifications, ranging from one star to five stars. Overall 60% of respondents where questioned during the winter season, and 40% during the summer season. The questionnaire investigated the expectations, by asking the following question "So you have a lot of experience with hotels with the ….. star category. What do you expect from …. star hotels?" The question was presented in an open question format, with respondents permitted to list as many responses as possible. Once the survey time had elapsed the responses were categorised.

The results showed that on an industry wide basis, responses such as "hygiene" and "not dirty" were listed under the heading of "cleanliness", which was the most popular expectation, cited by 16.3% of respondents. This fell to 9.3% citing friendly staff and 7.2% cited good quality food, although no definition was given regarding these attributes. As stated, respondents were asked an open ended and thus responses were categorised. In doing so bias has to be kept to a minimum, as such separate categories of "good service" and "service" were created separately. It cannot automatically be assumed that respondents who stated "service" meant "high quality service", as Dolnicar did not provide definitions with the attributes, thus terms such as toilet and tv are merely accepted in terms of being present or not rather than in terms of their quality characteristics. However, the research identified fundamental differences between hotel star classifications these can be seen in Table 5.4, from which three conclusions can be drawn.

Table 5.4 – Business travellers' hotel expectations by hotel star category

	One/Two star (%)	Three star (%)	Four star (%)	Five star (%)
Good food	**8.0**	**10.0**	**5.6**	**3.7**
TV	5.3	**6.0**	2.1	0.0
Good service	1.3	**4.0**	2.6	**4.9**
Good location	2.7	3.0	2.1	**4.9**
Staff	2.7	2.0	1.0	0.0
Good value for money	5.5	1.5	**3.1**	0.0
Pleasant atmosphere	0.0	1.5	**3.6**	**3.7**
Large room	0.0	1.5	**3.1**	**3.7**
Toilet	1.3	1.5	0.0	0.0
Cheap	1.3	1.0	0.0	0.0
Shower	**9.3**	1.0	1.5	1.2
Internet	0.0	1.0	1.5	2.5
High quality	0.0	0.5	1.5	2.5
Availability of food	**6.7**	0.0	0.0	2.5
Comfortable bed	2.7	0.0	1.0	1.2
Comfort	0.0	0.0	0.5	**3.7**

Source: Dolnicar, 2002 p.32

Note: The three most popular factors for each hotel category are shown in **bold**

First, those business travellers staying in one and two star hotels cite factors which are considered fundamental by guests of higher quality hotels, such as the presence of a shower and the availability of a comfortable bed. Secondly, business travellers staying in three star accommodation share the same expectation as guests in the lower grade hotels, such as good food and the availability of television in the room. However, good service is cited by over three-times as many responds in three star accommodation as it is in one or two star hotels. Thirdly, guests staying at five star hotels cite a wider range of factors, with no one individual factor cited by more than 4.9% of respondents.

Indeed, they expect good service, a good location, good food, a pleasant atmosphere, a large room and comfortable surroundings in a five star hotel. Overall, Dolnicar identified that with regards to expectations it is apparent that the group of business travellers questioned not only utilise different hotel categories and possess differing expectations regarding their accommodation

Dolnicar (2002) also examined business travellers' disappointments with regards to service quality offered by hotels, by posing the open ended question "What were – for you personally – the main reasons for – dissatisfaction in … star hotels?". Responses were categorised with biased kept to a minimum through the use of clearly defined categories. Again from an industry wide perspective, 'cleanliness' (those issues relating to hygiene) although cited as the most widely expected attribute, was cited by almost a fifth of respondents (19.4%) as a disappointment. Overall 13% of the respondents cited inadequate room design and setup, while personnel and service were cited by 10.2% and 8.3% respectively.

Table 5.5 lists distinct disappointments for business travellers staying in hotels of differing star ratings. Again three conclusions can be summarised from Table 5.5. First, guests in five star hotels state they have been disappointed by the level of service, the standard of the personnel and the overall quality of the hotel. These three factors are cited by considerable more guests in five star hotels than guests in any other hotel classification, suggesting higher expectations of staying in a high rated hotel. Secondly cleanliness and noise are disappointments for guests in the lower three hotel accreditation categories. While the third conclusion is that the basics of a bed and food are cited most often by business travellers in one and two star hotels, suggesting low expectations and requiring only basic facilities.

Table 5.5 – Business travellers' hotel disappointments by hotel star category

	One/Two star (%)	Three star (%)	Four star (%)	Five star (%)
Weakness - cleanliness	**33.3**	**22.5**	**17.9**	5.6
Too noisy	8.3	**10.0**	2.6	0.0
Weakness - service	0.0	**7.5**	2.6	**27.8**
Weakness - bed	8.3	5.0	5.1	5.6
Weakness - food	**25.0**	2.5	5.1	5.6
Too expensive	0.0	2.5	**7.7**	5.6
Bad quality	0.0	0.0	0.0	**11.1**
Weakness - personnel	**16.7**	0.0	**12.8**	**22.2**

Source: Dolnicar, 2002, p.32

Note: The three most popular factors for each hotel category are shown in **bold**

These conclusions regarding disappointments mirror that of the expectations, in that fundamental issues are cited more often by guest staying in hotels with lower star ratings. Whereas guests in hotels with a higher quality rating express their disappointment with intangibles, such as service quality. It is clear that "Once the attributes of service products are more clearly known and understood, service providers will be in a better position to anticipate consumer requirements rather than, as at present, to react to customer dissatisfaction" (Oberoi & Hales, 1990, p.700)

5.6 – The refurbishment of conference facilities as a response to the demand for service quality

As competition increases within the U.K. conference market, service quality is playing an increasing role in the selection of conference venues by conference planners (Robinson & Callan, 2002). Empirical research has identified that both conference planners and delegates are increasingly demanding a high quality conference product that offers good value for money. A key element of relative importance as highlighted by published research is a comprehensive range of conference capacities, along with flexible room designs that permit smaller breakout sessions and the provision of modern, appropriate technology with a good standard of decor (Meetings Industry Association, 2000; Robinson & Callan, 2003a, 2003b; Crouch & Louviere, 2004). Additionally, the ability of the venue to accommodate delegates on-site is also viewed as an important consideration. Venues are more attractive when the majority or all of the delegates can be located in an integrated conference / accommodation facility (Crouch & Louviere, 2004). Along with the ability to provide overnight accommodation to delegates, is the demand for high quality bedrooms (Meetings Industry Association, 2000).

As the demand for service quality has increased within the U.K. conference sector, so this sector has undertaken refurbishments in order to continually meet the needs of conference planners and delegates. Rogers cited in Chetwynd (2001, p.41) stated "it is important that venues upgrade and keep in tune with what the market is looking for". In a bid to provide a quality conference product, Lawson (2000, p.200) highlights the key issues that venues must take into consideration when providing conference facilities and it is these factors that must be kept at the forefront when refurbishments are undertaken. These factors are;

- Access, external circulation (arrival and departure) and internal circulation around the venue.
- Ambience, the quality of the interior in terms of comfort, warmth, colour, furniture and general fixtures and fittings.
- Lighting.
- Air-conditioning.
- Noise, both internal and external.
- Servicing, the provision of adequate support areas for activities such as catering and housekeeping.
- Safety and security.
- The provision of technology.

The refurbishment of a conference venue can be viewed as rejuvenation through service quality improvements. Through refurbishment, the venue is not only seeking to continually meet the needs of conference planners and delegates, but also venues are both extending and rejuvenating their lifecycle as a "result of conscious, deliberate decision-making on the part of management, or "strategic lifecycle extension" (di Benedetto & Bojenic, 1993, p560). Through the initiation of a new lifecycle, the venue is thus theoretically able to pass once again through the stages of Butler's (1980) lifecycle model, refer to Section 2.4. Such deliberate decision-making through the use of refurbishments will be examined in Chapter Seven.

Many purpose-built venues have undertaken refurbishment / construction programmes. Having identified the relative importance of flexible room designs permitting smaller breakout sessions along with the provision of modern, appropriate technology with a good standard of décor and the ability to accommodate delegates from published research (Meetings Industry Association, 2000; Robinson & Callan, 2003a, 2003b; Crouch & Louviere, 2004), empirical evidence of refurbishment has also been identified. The Aberdeen Exhibition and Conference Centre (AECC) rejuvenated its conference space through the investment of £18 million to create a flexible conference space including increasing the plenary hall capacity up to 2,000 delegates, the construction of two halls for 700 delegates, increasing the capacity of the existing auditorium from 300 to 500 and adding further break-out rooms. Additionally, the venue has upgraded its audiovisual equipment (Chetwynd, 2001). In rejuvenating their conference space the AECC now has the potential to attract larger conferences, and thus extent the duration of its lifecycle.

Similar experiences of extending the venues lifecycle can be seen within the hotel classification, which have experienced similar investment in order to attract both new and repeat visitation (Richards & Richards, 1994). The Hilton London Metropole, has invested £100 million in 2001 to create one of Europe's largest purpose-built international conference hotel, with 4,100m^2 of pillar-less meeting space, 37 meeting rooms, two of which will accommodate 1,900 delegates each and the largest individual room in London at 600 delegates per event (Chetwynd, 2001).

Although the literature from the 1980s was predominantly negative towards educational establishments providing conference facilities, by the late 1990s educational establishments were characterised by investment in and taking seriously the importance of offering conference facilities. In the U.K. since the year 2000, more than £200m has been invested in new facilities and the rejuvenation of older facilities by British Universities Accommodation Consortium (BUAC) to upgrade lecture rooms, banqueting facilities and substantial investment in the standard of student accommodation. Feedback from delegates using educational conference facilities shows that they get a more dedicated service in educational establishments than from some 4 star or 5 star hotels, as they give more customer-centric approach (Pemble, 2002).

Many of the negative aspects discussed in Section 4.6, have been addressed in recent years as investment in accommodation and conference facilities has increased. Educational establishments are now characterised by practical conference rooms providing good quality audio-visual equipment (Doyle, 2001), which are marketed specifically as conference venues. In order to address the conflict between the availability of resources and aligning with the conference season, many educational establishments have in recent years constructed purpose-built conference facilities, which are available throughout the year (Rogers, 1998). The research by Doyle (ibid) and Rogers (ibid) has shown that through refurbishment and investment, educational establishments have increased their service quality though the provision of a high quality conference product and accommodation. Additionally, their lifecycle has been rejuvenated as educational establishments with purpose-built conference facilities are now able to attract conference business all year round.

Within visitor attraction venue changes can also be identified. Initially many such venues converted space or utilised unused rooms to provide conference and meeting rooms (Leask & Hood, 2000). In recent years, there has been a change in the type and style of facilities offered by these venues (Leask & Digance, 2001). A greater sophistication can be seen in many of the new facilities offered, in particular purpose-built conference facilities are being added to the visitor attraction to capture conference business (Swarbrooke, 1996). These changes have occurred due to changes in the economic environment in recent years. Visitor attractions are now seen as commercially viable organisations and are geared to profit making, whereas visitor attractions such as museums were seen as providing an educational experience for the public, relying on grants provided by the local authority or government, or from entrance fee revenue (Leask & Spiller, 2002).

5.6.1 – Refurbishment due to the Disability Discrimination Act (1995)

Although research by Robinson & Callan (2003) identified that the subset of factors entitled “Access”, which included disabled access, was ranked seventh out of a total of ten subsets, the Disability Discrimination Act (1995) has acted as a catalyst for the conference sector and hospitality industry in general (U.K. Government, 2005). “The introduction of the Disability Discrimination Act (1995) gives disabled people rights of access to buildings, transport, work, services, decision-making and all the cultural, commercial and social activities of a modern and civilised society. It provides the legislative backbone to a growing movement, which seeks to ensure that disabled people can play the fullest possible part in society, including the participation in meetings and conferences”. The Act states that all hotels should provide bedrooms fitted out for disabled visitors, the number of bedrooms being dependent upon the size of the hotel (Rogers 1998). The Disability Discrimination Act (1995) came into effect in October 2004.

Conference venues will need to work alongside external organisations, such as The National Holiday Care Service charity. This charity provides in the U.K. a consultancy service to venues on the needs of disabled visitors, including the ‘Tourism for all National Accessible Scheme’. This is a draft conference standard which encourages conference and meeting venues to consider a range of features which may be introduced to help disabled delegates, including the approach to the facility, ramps, steps and stairs, external stepped approach, internal stairs, doors and furniture, passageways and corridors, the conference rooms, lighting, signage, telephones, registration desk, toilets, lifts, restaurants, and staff attitudes towards disabled delegates (Ladkin & Spiller, 2000).

The importance of improving the disabled facilities is apparent, first, to comply with the changes in the law and secondly, to obtain business from disabled clients. Campbell (2002, p.16) believes that many venues are in denial of the importance of investing into improving disabled facilities;

> "When will venues see that meeting the needs of disabled people is not just red tape…When are hotels going to sort out this problem? Don't they realise the vast majority of clients will have disabled people among their delegates? Treat disabled people badly and they will take their business elsewhere or, more seriously, the venue could face a claim for damages under the Disability Discrimination Act".

However, some venues have recently improved their disabled facilities to abide with new laws and to attract more business. For example, Wembley Conference Centre and Exhibition Halls has recently spent £150,000 on facilities which now offers ample car parking for visitors with disabilities. In addition funds have been put aside for an innovative training scheme for both staff and contractors (Chetwynd, 2001).

5.6.2 – Refurbishment of technical services

Refurbishment not only occurs with regards to the physical structure of the conference venue, but also to the facilities provided. Facilities that are prone to becoming outdated are that of technical services. Although Robinson & Callan (2003) identified that the subset 'meeting room tangibles', which includes the availability of audio-visual equipment and state of the art communications, are ranked sixth out of ten subset included in their study, many venues conference venues have refurbished their technical facilities however, many venues may outsource the provision of technical equipment when needed, rather than purchase the equipment, due to the initial cost of conference technology

(Chetwynd, 2001). If conference venues desire to stay competitive within the market place, venues must continually update their conference facilities and technology.

Technology continues to make an impact on meetings, with video-conferencing becoming more of a standard feature of the high-tech venue (Bryant, 1998). Rogers (1998), suggests that conference organisers are looking for venues which contain technology facilities such as a video-conferencing and satellite facilities in the building and web casting, as well as other facilities such as facilities for different catering needs, a registration area and crèche facilities. In 2001, Birmingham NEC introduced Europe's most sophisticated fibre-optic network and will provide Internet access, email, video-conferencing and life web demonstrations in a comprehensive package (Saunders, 2002). As the need for technology is becoming more apparent within conference facilities, Lawson (2000, pp142-144) provides a summary of technical services required within a conference venue;

1. **Extensive cabling** installed within a network of ducts or conduits to a range of terminal points and controls. Key requirements are easy access and flexibility in room layout and use due to frequent changes in connections and equipment and space for additions.
2. **User systems** provided such as microphones, sound amplification, interpretation, data and telephone communication, projection controls, coordinated lighting controls and promoting systems.
3. **Building systems** including energy management, fire sensing and defence, fire mode ventilation / smoke control, lighting sub-circuits and controls, power ring mains and terminals.
4. **Audio-visual systems** including sound amplification and speaker arrays, closed-circuit television networks, camera / recorder points and remote projectors, video and slide projectors with mechanised screens, language interpretation systems and operator booths. Interpreter booths are usually portable to allow changes in use.

It can be seen from this list that a wide range of technical facilities and services should be provided by conference venues if they are to meet the demands of conference organisers and delegates. Not all these technical facilities are used directly by the delegates, but are provided to create a quality conference product.

5.7 – Service quality, refurbishments and the cyclical representation of the conference sectors' lifecycle

Chapter Two of this thesis provided a critique of Butler's (1980) lifecycle model which detailed the theoretical progress a destination makes through its lifecycle and the associated characteristics of each stage. Butler viewed a destination as a product. However, Butler's model differentiated itself from previous models by introducing a theoretical exit from the lifecycle, in order that the destination can rejuvenate itself and commence its lifecycle once more. Therefore during the final stage of the lifecycle, the destination can either rejuvenate which will initiate a new lifecycle, or continue to decline. This research extends the theoretical constructs of Butler, by viewing both the U.K. conference sector and individual venues as products themselves, as such the sector and/or individual venues can themselves pass through the theoretical stages of Butler's lifecycle, until they either decline or rejuvenate. Section 2.4 also detailed that Russell & Faulkner (2004) criticise Butler's model for its quasi-linear representation of a destinations lifecycle, preferring instead to suggest that combining a destinations lifecycle with entrepreneurial triggers results in a cyclical representation of the lifecycle model.

This chapter has highlighted through the examination of empirical studies and literature review how individual venues both extend and rejuvenate their lifecycles as a "result of conscious, deliberate decision-making on the part of management, or "strategic lifecycle extension" (di Benedetto & Bojenic, 1993, p560). This is achieved through the use of service quality improvements such as refurbishments, including those in response to changes to in legislation and improvement in technical services. This research therefore supports the view of Russell & Faulkner (2004) with regards to a cyclical representation of a products lifecycle and forwards the view that within the over-arching lifecycle of the U.K.

conference sector, there are numerous lifecycles occurring at the individual venue level. As such, the cyclical representation of Butler's lifecycle model as shown in Figure 2.3 can be applied to the U.K. conference sector. In subsequent chapters this thesis shall outline empirical research to support this view.

5.8 – Summary of Chapter Five

This chapter has highlighted that as competition within the U.K. conference sector increases so greater emphasis is being placed on venue attributes that can be used by conference organisers and delegates to differentiate between venues (Crouch & Louviere, 2004). This venue selection process forms part of the overarching service quality domain. Both quality and service quality have received substantial theoretical attention for decades (Skalpe & Sandvik, 2002). Research has identified that dissatisfaction with the service experience accounts for approximately 70% of identifiable factors explaining why customers move from one service provider to another (Whitely, 1991), which in turn accounts for an estimated 30% of gross sales (Tally, 1991). Service quality is the measure of how well the delivered service meets customer's expectations (Lewis & Booms, 1983; Gronroos, 1984). Within the conference sector, service quality is expressed as customer satisfaction which exists when the venue supplier meets the conference organisers and/or delegates' expectations (Shetty & Ross, 1985; King, 1987; Culp et al, 1993).

Empirical research discussed within this chapter has identified numerous conference venue attributes which play a role in the site selection process undertaken by both conference organisers and delegates (Meetings Industry Association, 2000; Davidson & Cope, 2003; Dolnicar, 2002; Crouch & Weber, 2002; Robinson & Callan, 2002; 2003; Crouch & Louviere, 2004). These factors include;

- The conference venue should be located centrally which is easily accessible to travelling delegates, with a range of retail, recreational and entertainment facilities within close proximity, along with good access to regional business districts.

- The conference venue should offer a high quality conference product, including the provision of a variety of conference capacities, modern, appropriate audio-visual equipment and a good standard of décor.
- Value for money.
- A high standard of service from staff.
- Accommodation on site is preferred, but the provision of accommodation close to the venue is also acceptable.
- Local support from local organisations.
- Effective marketing of the venue / destination.
- Uniqueness of the venue.

With regards to accommodation, the use of hotel classifications and grading schemes for the selection of hotels is common place. Around two-thirds of users staying in three, four or five star (or equivalent grading) hotels make use of hotel quality classifications within their accommodation selection process. Although this is not the primary means of selecting accommodation (Callan, 1995). Research has also identified three commonly cited attributes that are used within the accommodation selection process, that of location, reputation and value for money (McCleary, Weaver & Hutchinson, 1993; Weaver & Oh, 1993; Dolnicar, 2002). Findings by Dolnicar (2002) with regards to the expectations and disappointments of business travellers with regards to their stay in hotels have already been identified (Dolnicar, 2002) and are summarised in Table 5.6.

Although widely expected by business travellers, both hotel cleanliness and the hotel personnel are often disappointments. Additionally, Dolnicar (2002) examined expectations and disappointments across hotel classifications and grading schemes, identifying that guests within lower grade hotels cite expectations concerning fundamental issues. These expectations being the presence of a shower and comfortable bed, along with disappointments concerning beds and food provided. Guest within higher rated hotels expected a range of attributes, both tangible and non-tangible, whilst many were disappointed with the non-tangibles aspects of service quality.

Table 5.6 – Expectation and disappointments of hotels by business travellers

Expectations	%	Disappointments	%
Clean	16.3	Weakness : cleanliness	19.4
Friendly	9.1	Weakness : room	13.0
Good food	7.2	Weakness : personnel	10.2
TV	3.6	Weakness : service	8.3
Good service	3.4	Unfriendly staff	8.3
Service	3.1	Weakness : food	6.5
Good location	2.9	Too noisy	5.6
Good value for money	2.4	Weakness : bed	5.6
Atmosphere	2.4	Weakness : technical equipment	5.6
Shower	2.4	Small room	5.6
-	-	Too expensive	4.6
-	-	Bad location	3.7
-	-	Low quality	1.9
-	-	Weakness : bathroom	1.9

Source: Dolnicar, 2002, pp.32-33

The implications for the conference sector of these findings concerning both conference venue selection attributes and hotel selection attributes are clear. With competition between conference venues increasing, those venues providing service quality attributes as demanded by conference organisers and delegates may create a competitive advantage over those venues that do not. This is also true for conference venue accommodation. In the long term, those venues that continually fail to supply service quality attributes as demanded by their consumers may cease to operate.

In order to continually meet the expectations of conference organisers and delegates, conference venues within the U.K. conference sector have undertaken service quality improvements via refurbishment activities. Such refurbishment activities have wider implications than merely improving the quality of their conference product. As identified in Section 2.4, the time taken to pass through Butler's (1980) lifecycle model is influenced by a number of factors including the rate of development. Through the use of development such as refurbishment activities a conference venue may extend its lifecycle or indeed rejuvenate the venue through the inception of a new lifecycle. Refurbishments such as the creation of larger, more flexible conference capacities, offering a range of modern audio-visual and technical facilities, improvements in service quality offered by personnel and the creation of quality accommodation may result in the diversification, restructuring or re-orientation of the venue. Thus the venue through the initiation of a new lifecycle is theoretically able to pass once more through the lifecycle stages as define by Butler (ibid). As such it is proposed that the lifecycle of the U.K. conference sector is cyclical rather than the traditional quasi-linear as proposed by Butler (ibid), containing numerous lifecycles through which individual venues are systematically passing as a consequence of service quality improvements via refurbishment activities. Empirical research to support this view is discussed in Chapter Seven.

CHAPTER SIX – METHODOLOGY

6.1 – Introduction

This chapter examines the research process undertaken for this thesis. It identifies that there are four over-arching stages to this process, these being the essential first steps, the research design, the data collection as well as analysis of the data and interpretation of the results. The issues and concerns involved with each of these stages are outlined and the responses adopted to address these issues and concerns are discussed.

6.2 – The research process

Authors such as Veal (1992; 1997), Neuman (2000), Jennings (2001) and Weaver & Oppermann (2002) have identified models detailing the research process. Table 6.1 shows comparisons between such models. In many cases the four models listed in Table 6.1 share common steps through the research process, indeed very little differs between Neuman's and Weavers & Opperman's approaches except terminology. However, in practice, there is no overall consensus about the stages to be followed during research (Robson, 1993). Due to the level of granularity offered by Veal's (1997) approach, which makes it an ideal framework upon which to base research within the U.K. conference sector, this research adopts Veal's methodology.

Table 6.1 – Research process model comparison

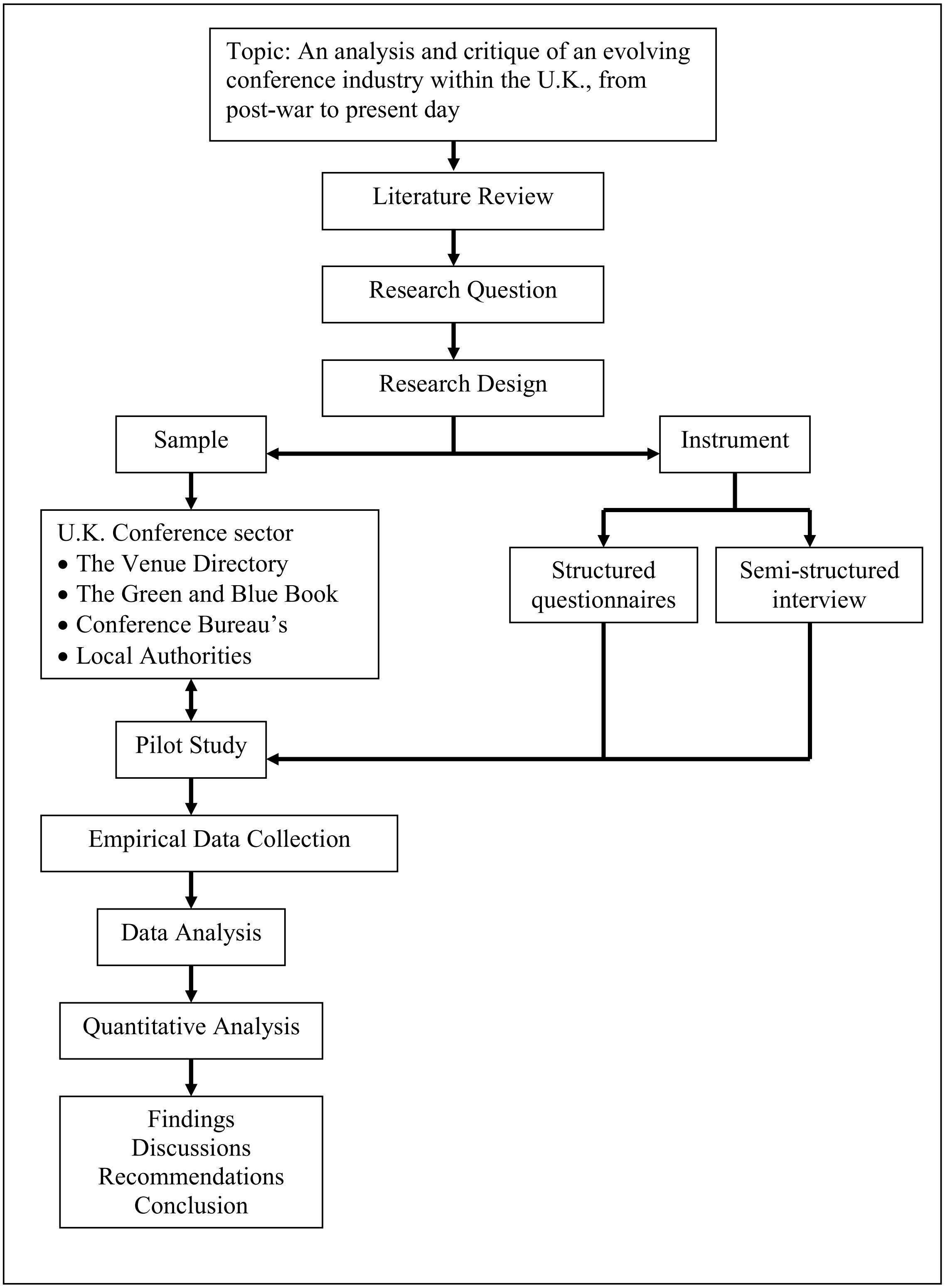
<table>
<tr><th>Veal
(1997)</th><th>Neuman
(2000)</th><th>Jennings
(2001)</th><th>Weaver & Opperman
(2002)</th></tr>
<tr><td>Research Problem</td><td>Choose Topic</td><td>Identify Research Topic</td><td>Problem Recognition</td></tr>
<tr><td>Review Literature</td><td>Focus Research Question</td><td rowspan="2">Develop Research Design</td><td>Question Formulation</td></tr>
<tr><td>Identify Aims Objectives Hypotheses</td><td>Design Study</td><td>Identification of Data</td></tr>
<tr><td>Research Question</td><td>Collect Data</td><td rowspan="2">Implement Research Design</td><td>Data Collection</td></tr>
<tr><td>Research Design</td><td>Analyse Data</td><td>Data Analysis</td></tr>
<tr><td>Data Collection Techniques</td><td>Interpret Data</td><td rowspan="2">Report Findings</td><td>Data Presentation</td></tr>
<tr><td>Subject Selection</td><td>Inform Others</td><td>Data Interpretation</td></tr>
<tr><td>Data Processing Analysis</td><td>-</td><td>-</td><td>-</td></tr>
</table>

As Table 6.1 shows, Veal's approach contains eight steps and it is possible to categorise these eight steps into four major stages of research. These are;

1. The essential first steps (steps 1 to 4)
2. Research design (step 5)
3. Data collection (steps 6 and 7)
4. Analysis and interpretation (step 8)

Figure 6.1 shows a process flow-line based upon Veal's (1997) eight stages to research that this thesis research shall follow.

Figure 6.1 – Procedure flow of the research, based on veal (1997)



6.3 – The essential first steps

The first stage of the research process can be broken down into four essential steps. At the commencement of this research these four essential steps were undertaken, the process of which is shown in Figure 6.2.

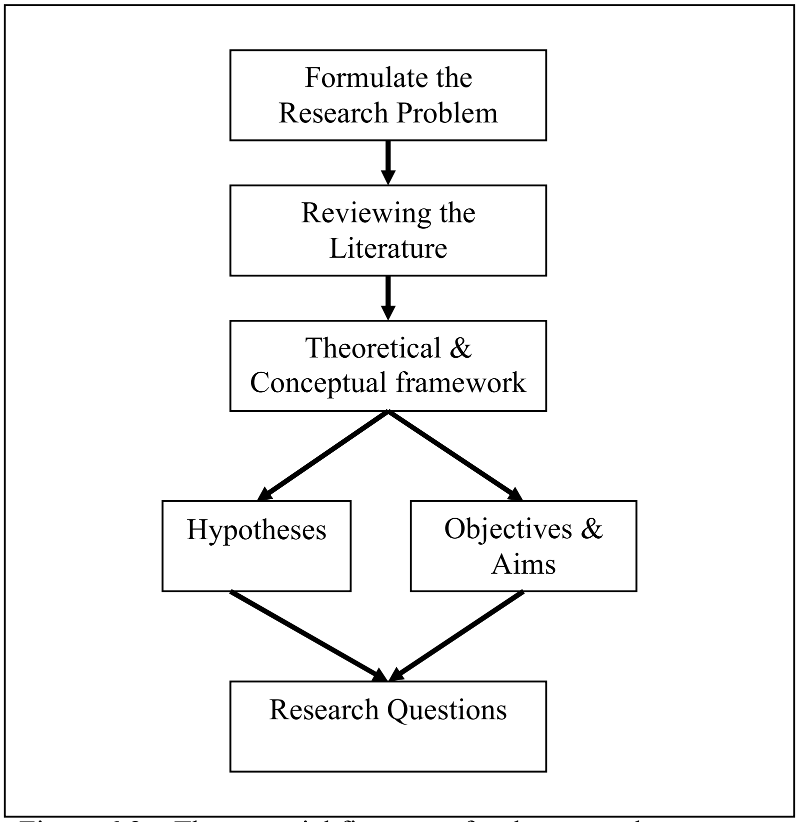


Figure 6.2 – The essential first steps for the research process

From Figure 6.2 these steps are seen as;

- The formulation of the research problem,
- The review of appropriate literature in order to construct a conceptual framework,
- The identification of aims, objectives and hypotheses,
- The identification of the research questions.

These steps can be viewed as essential on the basis that if they are not undertaken satisfactorily they will undermine the validity of the latter stages of the research.

This is a process of moving from the general to the specific and requires clear thinking as the focus of the research is narrowed (Pizam & Mansfield, 1996). The product of this stage is a clear statement of the issues to be researched, this includes the identification of a conceptual framework and the development of the research aim, objectives and hypotheses.

6.4 – Formulation of the research problem

The initial stage of the research process is to identify a research problem. According to Dixon et al (1987), a specific topic may arise from a variety of sources including the researcher's personal interest, which is generally the starting point in the selection process, along with social concerns, a popular media issue or issues identified from the literature review. This current research problem stems from the author's academic background in the field of tourism and specifically the author's previous research studying the U.K. conference sector.

6.4.1 – Review of the appropriate literature

"Reviewing the literature is an academic term referring to the process of identifying and engaging with previously published research relevant to the topic of interest" (Veal, 1997, p.43). The aim of any literature review is to familiarise the researcher with the existing body of knowledge relevant to the over-arching research topic. In identifying the existing body of knowledge, the researcher should aim to clarify and narrow the research question focusing on gaps in this body of knowledge (Preece, 1994). As such there are a number of questions that a researcher should consider when undertaking a literature review, these are seen in Table 6.2.

From Table 6.2 it can be seen that differing questions should be asked of the literature depending upon whether or not the research is examining a single piece of literature, or a body of literature. However, irrespective of whether the researcher is examining a single literature item or body of literature, the process of a literature review is as much to ascertain what is not known, as it is to determine what is known (Black, 1994).

Table 6.2 – Questions to be ask when undertaking a literature review

(a) Individual items • What is the (empirical) basis of this research? • How does this research relate to other research writing on this topic? • What theoretical framework is being used? • What geographical area does the research refer to? • What social group(s) does the research refer to? • When was the research carried out and is it likely to be empirically valid?
(b) In relation to the literature as a whole • What is the range of research that has been conducted? • What methods have generally been used and what methods have been neglected? • What, in summary, does the existing research tell us? • What, in summary, does the existing research not tell us? • What contradictions are there in the literature – either recognised or unrecognised by the authors concerned? • What are the deficiencies in the existing research, in substantive or methodological terms?

Source: Veal, 1997, p.32

Based upon the published recommendations in Table 6.2 for undertaking literature review, various sources including textbooks, journals, trade publications and the internet were utilised from the previous four decades. The basis of the literature review covered a wide spectrum of topics, including the U.K. conference sector, current research issues within the U.K. conference sector, the economic, social and environmental consequences of introducing a conference venue, conference venue classifications and their definitions, conference venue refurbishment programmes, lifecycle models and service quality including venue selection attributes.

The geographical area of the literature review was predominantly focused on the U.K., however, where a dearth of literature existed research from Australia and the U.S. was drawn upon. As stated in Section 1.4.3 authors including Rogers (1998; 2003), Lawson (2000), McCabe et al (2000), Weber & Chon (2002), Davidson & Cope (2003) increased the awareness of the conference sector as a whole, with academic research predominantly a product of western Europe, the U.S. and Australia (Ladkin & Spiller, 2001; Spiller, 2002). These three regions have both mature conference destinations (Spiller, ibid) and have developed university disciplines in tourism, business and marketing in which research into the conference sector can flourish, however, where research from outside the U.K. was drawn upon it's validity to the U.K. was examined in order to identify whether or not it was applicable to this U.K. based research. In doing so a body of knowledge was developed concerning the above subject areas. Within this body of knowledge complimentary research, i.e. a number of empirical studies that supported each other were identified, as was conflicting research, i.e. studies concerning the same issues but identifying differing conclusions. In identifying this body of knowledge, along with complimentary and conflicting research the author was able to identify gaps within the knowledge.

As stated, the literature review was concerned with identifying characteristics of U.K. conference sector, along with current research issues within the U.K. conference sector, the economic, social and environmental consequences of introducing a conference venue, conference venue classifications and their definitions, conference venue refurbishment programmes, lifecycle models and service quality including venue selection attributes. This research does not examine any sociological characteristics of the U.K. conference sector, indeed questionnaire respondents are anonymous, except for their job title. As such the literature review itself did not identify nor examine any social groups within any of the stated literature review topics.

6.4.2 – A conceptual framework

A conceptual framework is developed from theory, where theory is used as a guiding framework to help the researcher explain and understand the research findings. Both theory and empirical evidence are linked through the research process (Bryman, 1989). Research therefore requires a theory as a framework for analysis and interpretation, whilst theory requires research to constantly review, modify and challenge theoretical details.

6.4.3 – A summary of existing literature within the U.K. conference sector

As Section 6.4.1 details, various sources including textbooks, journals, trade publications and the internet were utilised from the previous four decades in order to carry out the literature review in response to the questions identified by Veal (1997) in Table 6.2. In doing so, gaps in the body of knowledge concerning the research subject were identified. The initial research problems that formed the reason for undertaking this thesis were crystallised further following the literature review that formed the basis of chapters one through to Chapter Five. The theoretical and conceptual frameworks underlying this research were developed following evidence and observations stated in Section 6.4.1. In Table 6.2 Veal (1997. p.32) identified that fundamental to the literature review is the identification of what the existing research informs the author. In summary the key findings of the literature review identifies that;

- The modern day conference sector is one of the fastest growing and highest yielding sectors within the overall tourism industry. It is an important generator of tourism expenditure, investment, foreign exchange earnings and employment (Abbey & Link, 1994; Dwyer & Forsyth, 1996; Oppermann, 1996a).
- The U.K. conference sector should not be considered as homogeneous (Pearce 1989; Weirich, 1992; Montgomery & Strick, 1995; McCabe et al, 2000; Rogers, 2003).
- In 2001 the U.K. conference sector contributed approximately £7.3 billion to the U.K. economy, compared to £6.6 billion in 2000. This was generated

from an estimated 1.4 million conferences, defined as involving 8 or more delegates, taking place at U.K. venues (British Tourism Authority, 2002).

- In 2001, UIA research identified the U.K. as the principal European destination for conferences (PriceWaterhouiseCooper, 2003) and the ICCA estimated that in the year 2000, the U.K. was ranked second on the basis of market share for global meetings (Leask & Spiller, 2002). The U.K. conference sector is therefore an important competitor in the global conference market place.
- With regards to the ability to undertake research within the U.K. conference sector, three principle issues hamper such research efforts. The first is that both the conference sector and data upon which research is reliant is geographically fragmented (Ladkin & Spiller, 2001). Secondly the reliability of data concerning the size of the conference sector is weak, due to inconsistencies in definitions and measurement (Crouch & Ritchie, 1998). Finally there is a lack of existing academic research in the sector to reference, with little academic research being undertaken in this sector prior to the 1980s (Ladkin & Spiller, 2001).
- The conceptual frameworks forwarded by authors such as Butler (1980) within the destination lifecycle model can be applied to the U.K. conference sector. Many U.K. coastal resorts have restructured and rejuvenated their tourism product, to include a conference venue as the destination enters the decline stage of its lifecycle, aiming to implement strategies rather than temporary cosmetic fixes (Agarwal, 1997; Knowles & Curtis, 1999).
- Through introducing conference venues to rejuvenate a destination, the tourism lifecycle can be both extended and revitalised as a "result of conscious, deliberate decision-making on the part of management, or "strategic lifecycle extension" (di Benedetto & Bojenic, 1993, p560).
- Often the strategy of introducing conference facilities to a destination is much broader then simply revitalising infrastructure, additionally including social and economic objectives at a local level (Go, Govers & Vliegenthart, 2002; Business Tourism Partnership, 2003).
- This research has linked theoretical benefits of rejuvenating a destination through the use of conference venues with the theoretical consequences of entering the post-stagnation phase of Butler's lifecycle. As such this

research is in agreement with the theories of Agarwal (1997; 2002) and Knowles & Curtis (1999) that a conference venue is a valid tool for rejuvenation.

- The temporal changes that have taken place since 1992 in both the terminology used by authors and also the number of typologies used by authors has been highlighted.
- Many of the typologies used to classify the U.K. conference sector are outdated, such as Lawson's (2000) classification of hotels as being 'Adapted Use'. Many are often confusing, with no clear differentials between terms used. Thus this research forwards the view that a typology consisting of four categories is best suited to describe the U.K. conference sector. These are; Purpose-built conference venues, hotels with conference facilities, educational establishments with conference facilities and visitor attractions with conference facilities.
- The U.K. conference sector has experienced an increase in competition (Robinson & Callan, 2003a, 2003b). This competition highlights the types and ranges of factors that underlie the conference venue selection process employed by conference organisers and delegates (Crouch & Louviere, 2004).
- Venue selection is encompassed within the theories of service quality, which have been a significant preoccupation of the hospitality throughout the 1980s and 1990s (Johns, 1996).
- Empirical research has identified numerous conference venue attributes which play a role in the site selection process undertaken by both conference organisers and delegates (Meetings Industry Association, 2000; Crouch & Weber, 2002; Dolnicar, 2002; Robinson & Callan, 2002; 2003; Crouch & Louviere, 2004). These factors include; the conference venue should be easily accessible to travelling delegates, with a range of retail, recreational and entertainment facilities with close proximity; the conference venue itself should offer a high quality conference product, including the provision of a variety of conference capacities, modern, appropriate audio-visual equipment and a good standard of décor; value for money; a high standard of service from staff.

- Accommodation on site is preferred, by the provision of accommodation close to the venue is also acceptable
- The expectations and disappointments of business travellers with regards to their stay in hotels have also been identified (Dolnicar, 2002). Although widely expected by business travellers, both hotel cleanliness and hotel personnel are often disappointments.
- The implications of these findings concerning both conference venue selection attributes and hotel selection attributes are clear for the U.K. conference sector. Those venues providing service quality attributes as demanded by their customer may create a competitive advantage over those venues that do not. This is also true for conference venue accommodation. In the long term, those venues that continually fail to supply service quality as demanded may cease to operate (Meetings Industry Association, 2000; Crouch & Weber, 2002; Dolnicar, 2002; Robinson & Callan, 2002; 2003; Crouch & Louviere, 2004).
- In order to continually meet the expectations of conference organisers and delegates, conference venues within the U.K. conference sector have undertaken service quality improvements via refurbishment activities (Meetings Industry Association, 2000; Robinson & Callan, 2003a, 2003b; Crouch & Louviere, 2004).
- Such refurbishment activities have wider implications than merely improving the quality of their conference product. Refurbishments such as the creation of larger, more flexible conference capacities, offering a range of modern audio-visual and technical facilities, improvements in service quality offered by personnel and the creation of quality accommodation may result in the diversification, restructuring or re-orientation of the venue, thus the venue, through the initiation of a new lifecycle is theoretically able to pass once more through the lifecycle stages as define by Butler (1980).
- The conceptual framework that is applied by this research is therefore Butler's (1980) lifecycle model and in particular its extension through the Russell & Faulkner (1998) criticism that the destination lifecycle model is quasi-linear. Russell & Faulkner (1998) preferring instead to view the lifecycle model as cyclical.

- As such it is proposed that the lifecycle of the U.K. conference sector is cyclical rather than the traditional quasi-linear as proposed by Butler (1980), containing numerous lifecycles through which individual venues are systematically passing as a consequence of service quality improvements via refurbishment activities.

6.4.4 – The research aim, objectives and hypotheses

In Section 1.3 the overall aim of this thesis was stated as providing an analysis and critique of an evolving conference industry within the U.K., from post-war to present day. Based on the literature review undertaken with regards to this overall aim, five distinct objectives have been identified which were also stated in Section 1.3 and are re-stated for clarity below;

- To outline the characteristics of the different classifications of the U.K conference sector. Additionally, this research will analyse if the existing classifications are the most appropriate to use in segmenting conference supply.
- To identify which type of conference venue development accounted for the most significant growth in the U.K conference sector.
- To outline reasons for the development of each venue classification and to explore the mechanisms used to diversify into the conference market.
- To forecast the future development for each of the venue classifications identified.
- To test if the lifecycle model can be used to explain the development of the U.K. conference sector.

These objectives will answer the following research hypotheses:

- Current classifications of conference venues are an appropriate way to segment venue supply (Objective One)
- Purpose-built venues were responsible for the most significant growth in the U.K conference sector (Objective Two)

- Changes to venue facilities were economically driven (Objective Three)
- Future composition of the U.K conference sector will continue to be dominated by hotel conference venues (Objective Four).
- The lifecycle model can be used to explain the development of the conference sector (Objective Five)

6.5 – Research design

Having identified the research aims, objectives and hypotheses it is now possible to undertake the second stage of research, as defined in Section 6.2, that of the 'Research Design'.

6.5.1 – Qualitative or quantitative analysis

Data organisation and analysis can be examined using two research methodologies, that of qualitative and quantitative. In order that the research objectives are answered appropriately, the researcher should consider which methodological approach is appropriate for the data collection, organisation and analysis (Mutchnick & Berg, 1996).

6.5.1.1 – Qualitative methodology

Qualitative research techniques are designed to identify motivations, reasons, impressions, perceptions and ideas (Peterson, 1994) and are firmly ensconced in interpretative social science, being inductive within nature and based upon textual representations of the study topic (Jennings, 2001). The advantages of employing a qualitative methodology are that;

- Qualitative methodologies provide a means of transcribing and analyzing the discursive construction of everyday events, whilst exploring the historical nature within a social group or local setting.

- Qualitative research has also provides insider knowledge required by members of a group (especially outsiders) to participate in socially and academically appropriate ways.

(Putney & Green, 1999, p.377, cited in Chappel, 2005a)

Any research project that utilises this methodology will gather its data via, amongst others, interviews, observations or focus groups. However, in identifying the process involved in qualitative research, many disadvantages become apparent, indeed both Chappel (2005a) and Peterson (1994, pp.488-489) identify a number of limitations to qualitative research techniques, as listed below;

- Current techniques of data collection typically involve semi-structured interviews that can place considerable demands on participants' time, making it difficult to recruit respondents for whom time is often at a premium
- Qualitative research is time-consuming, not only with regards to the data collection process, but also because analysis involves continual movement between the data and emerging themes to adapt and verify the analytical framework being developed
- The findings of research utilising qualitative techniques should be considered as informed hypotheses and not proven facts
- Qualitative findings may be limited by skill, experience and understanding of the researcher gathering the information
- There is a risk that the researcher may influence responses and introduce bias through the interview techniques employed.

As such qualitative methods cannot represent the whole population, but rather provide a ‘thick description’ or snapshot of participants (Jennings, 2001). An additional limitation with qualitative research methods specific to this research of the U.K. conference sector can be identified;

- This research covers the venue typology identified in Chapter Four throughout the U.K. and thus obtaining a geographically representative sample of interviews, focus groups and/or observations was both financially and temporally constrained.

6.5.1.2 – Quantitative methodology

Quantitative research involves a cycle of successive phases of hypothesis formulation, data collection, analysis and interpretation (Huysamen, 1997). It employs analysis that is numerical in nature and typically data analysis which involves ordinal, interval or ratio variables (Mutchnick & Berg, 1996). According to Chappel (2005b) Gay & Airasian, (1999) and Williams & Monge (2001, p.5) quantitative methods are thus appropriate;

- Where descriptive or survey research attempts to answer questions about the current status of the subject or topic of study, including the preferences, attitudes, practices, concerns, or interests of some group of people (Gay & Airasian, 1999).
- When probabilities need to be calculated in order to establish whether or not certain generalisations are beyond simple chance occurrence.
- To test the validity of stated hypotheses.

Two critical issues in descriptive design, both necessary for validity, are the ability to generalise from the sample (which must be large) and the reliability and validity of the observations (measurements) (Fong, 1992). As such, research employing this methodology will be initiated with a theory or hypothesis regarding the study topic, primary data will be gathered and analysed in order to support or reject the initial theory or hypothesis. In order to do so data is extracted as statistical representations of the real world, instead of textual pictures as the qualitative methodology produces. The process is objective in nature and is usually representative of the population as a whole (Williams & Monge, 2001). However, in identifying the process to undertake quantitative research, many disadvantages arise. These are summarised below;

- Quantitative research is neither appropriate nor cost effective for learning why people act or think as they do. The questions must be direct and easily quantified and the sample must be quite large so as to permit reliable statistical analysis. (Urban Wallace & Associates, 1995).
- The primary disadvantage of quantitative research is that issues are only measured if they are known prior to the beginning of the survey and therefore, have been incorporated into the questionnaire (McCullough, 1997).
- Quantitative research requires the advance formulation of specific hypotheses (Huysamen, 1997).
- Though occurring in both qualitative and quantitative, a possible disadvantage is researcher bias. Researcher bias tends to result from selective observation and selective recording of information and also from allowing personal views and perspectives to affect how data are interpreted and how the research is conducted (Johnson, 1997).
- Quantitative research also has the disadvantage that the resulting theory often fails to take account of the unique characteristics of individual cases (Edwards, 1998).

6.5.1.3 – The differences and similarities between qualitative and quantitative methodologies

There are many differences and similarities between the methodologies discussed, as shown in Table 6.3. From Table 6.3, quantitative analysis is used for numerical based analysis, testing hypotheses which are abstracted from the real world using numbers and statistical representation. Whilst qualitative methods are favoured for text based analysis generating theory which is grounded in the real world and maintained in the same form as the data were collected.

Table 6.3 – Differences / similarities in qualitative and quantitative data analysis

	Qualitative	Quantitative
Differences	Text-based analysis to identify themes.	Numeric analysis using statistical formulae
	Inductive approach	Deductive approach
	Generates theory from empirical data and evidence	Tests hypotheses
	Analysis begins with data collection	Analysis begins when all data are collected
	Data analysis is grounded in the real world and maintained in the form the data were collected.	Data analysis is abstracted from the real world using numbers and statistical representation
Similarities	Analysis involves inferences founded in empirical (ideographic) data	Analysis involves inferences founded in empirical (numerical) data
	Method(s) of analysis are made visible to readers through the research design	Method(s) of analysis are made visible to readers through the research design
	Comparisons are made between empirical data to identify differences and similarities	Comparisons are made between empirical data, particularly covariance between variables
	Analysis attempts to be error-free	Analysis attempts to be error-free

Source: Neuman, 2000, p.56.

The similarities between the two methodologies are that they both utilise empirical data in order to identify similarities and differences in data, whilst being error free. These methodologies are not mutually exclusive and are often used together within the research process and this is referred to as mixed methodologies.

6.5.2 – Research approaches

The discussion continues by identifying seven approaches to research that could be adopted.

6.5.2.1 – Exploratory research

Where limited research has been undertaken to collect primary data concerning the study subject, exploratory research can be utilised to create a more comprehensive research topic and identifying additional concepts that could be used in further research. Exploratory research can therefore draw upon secondary sources as well as expert opinions; hence qualitative methods are commonly used to undertake this research approach (Ritchie & Goeldner, 1994). The advantages of this approach are that it helps the researcher to familiarise themselves with the problem or concept to be studied and thus helps determine the best research design, data collection method and selection of subjects. However, this approach is used where limited primary data has been collected, thus drawing on secondary data. Therefore the results of exploratory research are not usually useful for decision-making by themselves. They instead provide insights into a given situation, but the results can neither be generalised or they representative of the whole population being studied (Joppe, 2005a).

6.5.2.2 – Descriptive research

This research approach provides a picture to the researcher of the study phenomenon (Neuman, 2000), with examples being descriptions of tourism patterns and behaviours such as length of stay and tourism expenditure. The main disadvantage of this approach is that it does not aim to provide reasons but merely to describe the study subject. In other words it does not establish a causal relationship between variables (Cognitive Aptitude, 2005). The wide use of this method in tourism research is because tourism is continually changing, again examples can be seen in tourism patterns and behaviours. The results of descriptive research can in turn prove to be beneficial to planners and policy makers, as there is often a gap between the study topic and existing policy and / or planning activity (Veal, 1996). Descriptive research can be achieved through quantitative, qualitative or mixed methodologies.

6.5.2.3 – Explanatory research

The fundamental principle to this research approach is to establish the ‘how’ and ‘why’ of the study topic (Jennings, 2001), in essence the cause of a phenomenon, such as why a specific tourism pattern has established. In order to establish any causal relationship data will be collected, analysed and interpreted more rigorously (Veal, 1996). In establishing explanations, this research approach could utilise quantitative, qualitative or mixed methodologies and does not depend exclusively on hypothesis. The main disadvantage of this approach is that it requires a much more detailed data collection process, questioning respondents with regards to why events have taken place. Such questioning can thus result in subjective data being collected, the analysis of which also requires greater effort (Richards, 2005).

6.5.2.4 – Causal research

Unlike explanatory research, this approach does rely exclusively on hypotheses to establish causal relationships. If the objective of the research is to determine which variable might be causing certain behaviour, i.e. whether there is a cause and effect relationship between variables, causal research should be undertaken (Joppe, 2005b). In order to determine this causality, it is essential to hold the variable that is assumed to cause the change in the other variable(s) constant, while measuring the changes in the other variable(s). The main disadvantage is that this type of research is very complex and the researcher can never be completely certain that there are not other factors influencing the causal relationship, especially when dealing with people’s attitudes and motivations. There are often much deeper psychological considerations, that even the respondent may not be aware of (Joppe, 2005b). As such quantitative methods are utilised to establish support or rejection of a stated hypothesis (Ritchie & Goeldner, 1994).

6.5.2.5 – Comparative research

This approach involves temporal comparisons of the study topic, such as U.K. conference delegate numbers in 1997, 1998 and 1999, which are collated by the ICCA and UIA. The fundamental aim of this approach is to identify similarities and differences (Jennings, 2001) within attributes of the study topic. In doing so, planners, strategists, legislators or marketing departments can use the results of comparative research. This approach may utilise quantitative, qualitative or mixed methodologies.

6.5.2.6 – Evaluative research

This approach is more akin with applied research, instead of theoretical, as it identifies the outcomes of an action within the study topic. The results can both be established and maintained throughout the research, which is termed 'formative' or at the end of the research, which is 'summative' (Veal, 1992). Again, this approach could draw upon quantitative, qualitative or mixed.

6.5.2.7 – Predictive research

As the name suggests, this approach's principle objective is to identify information concerning future events within the study topic. Such an approach can be divided into short, medium and long term as well as 'futurism'. Short term is defined as one or two years, medium is three to five years, long term as six to ten years and futurism is beyond ten years (Mill & Morrison, 1998). Although mathematical modelling can be applied, essentially this approach is based upon expert judgement and opinion (Jennings, 2001) and as such draws upon the descriptive research discussed in Section 6.5.2.2. This approach, as with most research approaches, can either utilise quantitative, qualitative or mixed methodologies.

6.5.3 – The research style

Not only is the research methodology and approach adopted important, but also the research style. Many authors (Veal 1992; Ritchie & Goeldner 1994; Finn, Elliott-White & Walton, 2000) distinguish between differing styles of research. These are;

- Ethnographic methods
- Experimental methods
- Survey methods

6.5.3.1 – The ethnographic methods

Ethnographic research is the study of the complexities of social interaction and cultural change within its native setting, focusing on the meanings that participants attribute to these interactions (Marshall & Rossman, 1999). It effectively seeks to see the world through the eyes of those being studied, permitting those being researched to speak for themselves through direct quotation (Veal, 1992). Although this method provides in-depth analysis, its main disadvantage is that it is also time-consuming, often taking between six months and two years to get a complete picture of the study topic (Fetterman, 1989). Its advantage is that it has the potential to identify behaviour rather than opinion or data held in official records. A distinct disadvantage is that the researcher should ensure that prejudices are minimised so that results are not biased in any direction.

6.5.3.2 – The experimental method

It involves testing variables under a controlled environment, in order to establish the effect that the independent variable has on the dependent variables. This is achieved through the establishment of an experimental group and a control group. The application of the method is less common in tourism research, as a distinct disadvantage of this method is that it is difficult to control dependent variables whilst studying the independent variables effect (Veal 1992; Writing@CSU, 2005a).

6.5.3.3 – The survey method

Survey based research involves respondents answering questions that have previously been determined as being relevant to the research, either as part of a face-to-face interview, via a telephone interview or by postal response (Salant & Dillman, 1994; Finn, Elliott-White & Walton, 2000). The advantages of utilising a survey method are thus;

- Surveys are relatively inexpensive (especially self-administered surveys).
- Surveys are useful in describing the characteristics of a large population. No other method of observation can provide this general capability.
- They can be administered from remote locations using mail, email or telephone.
- Consequently, very large samples are feasible, making the results statistically significant even when analysing multiple variables.
- Many questions can be asked about a given topic giving considerable flexibility to the analysis. There is flexibility at the creation phase in deciding how the questions will be administered: as face-to-face interviews, by telephone, as group administered written or oral survey, or by electronic means.
- Standardised questions make measurement more precise by enforcing uniform definitions upon the participants.
- Standardisation ensures that similar data can be collected from groups then interpreted comparatively (between-group study).
- Usually, high reliability is easy to obtain by presenting all subjects with a standardised stimulus, observer subjectivity is greatly eliminated.

(Writing@CSU, 2005b).

This method is there less intrusive to the survey population. Questions can be responded to via a self-completion questionnaire and thus a large quantity of data can be collected in a relatively short period of time. Surveys are the most important source of information for tourism planning, analysis and decision-making (Smith, 1997). However, disadvantages are also common with this research method.

- A methodology relying on standardisation forces the researcher to develop questions general enough to be minimally appropriate for all respondents, possibly missing what is most appropriate to many respondents.
- Surveys are inflexible in that they require the initial study design (the tool and administration of the tool) to remain unchanged throughout the data collection.
- The researcher must ensure that a large number of the selected sample will reply.
- It may be hard for participants to recall information or to tell the truth about a controversial question.
- As opposed to direct observation, survey research (excluding some interview approaches) can seldom deal with "context."

(Writing@CSU, 2005b).

The use of survey methods has been well documented, such as Nixon (1954); Berdie & Anderson (1974); Heberlein & Baumgartner (1978); Adams & Gale (1982); Mangione, (1995); Denscombe, (1998); Bechhofer & Paterson (2000). Consensus from these researchers exists, in that the key to the successful completion of survey based research is to obtain data that is representative of the entire survey population. Its execution must be undertaken in a systematic and logical manner. With the success of a survey being indicative in its response rate, which is the percentage of surveys dispatched compared to those that have been returned and deemed usable (Fink & Kosecoff, 1998). Finn, Elliot-White & Walton (2000) state that the construction of a successful survey is grounded in an appropriate and comprehensive review of the relevant literature.

Survey research enables the development and testing of hypothesis in order to satisfy the overall aims of this research and thereby helps establish closer relationships between theories and practices. Due to these advantages of collecting a large volume of data over a relatively short period of time and that the data can be used deductively or inductively. This method is most commonly used within the domain of tourism (Smith, 1997).

6.5.4 – The research methodology, approach and style employed

This research provides an analysis across the four venue classifications that comprise the U.K. conference sectors single typology. The analysis shall test hypotheses and identify trends. As such the 'survey method' of research style shall be adopted, as the required data can be gathered relatively quickly across the entire U.K. conference sector.

As this research aims to contact a representative sample of conference venues in the U.K. observations are not a valid means of gathering data for this research. Additionally, there is no requirement to identify cultural changes that adopting an ethnographic style would achieve. Again, financial and time constraints associated with this research would prevent a representative ethnographic sample across the conference sector from being collected. Moreover, an experimental method was not chosen as it is difficult to control dependent variables in the tourism domain due to its dynamic nature.

On the basis that data will be collected via a survey in response to a set of predetermined questions, a large amount of data that can be compared will be collected. As such a quantitative methodology is more suited than a qualitative methodology based upon the advantages and disadvantages discussed earlier, thus a quantitative methodology will be adopted for this research. Overall this research will:

- Include a deductive approach to test the validity of stated hypotheses.
- Have a structured, systematic and replicable research design.

- Be undertaken by a researcher who is considered an outsider by the study population.
- View the conference sector as consisting of causal relationships.
- Test relationships between variables.
- Every organisation in the survey population has an equal chance of participating.
- Represent data numerically.
- Use statistical analysis.
- Provide findings that can be generalised from the sample to the study population.
- Findings are shown as statistical tables and graphical representations.

(Jennings, 2001 p. 130).

With regards the research approach adopted for the presentation of the findings, no one singular research approach discussed is broad enough, hence a multiple approach has been adopted for this research. Elements from the descriptive, explanatory, comparative and predictive approaches have been utilised in order to answer the hypotheses.

6.6 – Data collection technique

The third stage in the research process, as discussed in Section 6.2, is the data collection through the research instrument.

6.6.1 – The research instrument

The term questionnaire is used as a generic term for a structured list of questions, which can be completed by three distinct methods, that of a postal survey, face-to-face interviews and telephone interviews (Salant & Dillman, 1994; Smith, 1997; Finn, Elliott-White & Walton, 2000). Although it should not be considered that these formats are mutually exclusive, as they can be combined, such a telephone survey to identify suitable candidates who are subsequently issued with a postal questionnaire. Each of these methods cannot be judged as superior to the others simply in abstract. Each should be considered and evaluated in order to establish whether or not they are 'fit-for-purpose', in terms of the study topic, population, budget, staff and time constraints.

Table 6.4 highlights the differing characteristics of the three basic survey formats.

Table 6.4 – Characteristics of survey formats

Issue	Personal Interviews	Telephone Surveys	Mail-back Questionnaires
Budget	High cost	Medium cost	Lower costs
Sample size	Small	Medium	Large
Need for trained interviewer	Very high	High	No
Need to probe responses	Good	Limited	Not possible
Rating of long lists of items	Acceptable	Difficult	Good
Open ended questions	Easily handled	Easily handled	Difficult
Need to control who answers questions	Possible	Possible	Not possible
Difficulty in delivery of questionnaire	High	High	Low
Typical response rates	High	Medium	Low
Time required for survey	Medium	Short	Extended

Source: Smith, 1997, p.67

These characteristics as shown in Table 6.4 are now discussed.

6.6.1.1 – Personal interviews

Personal interviews are commonly referred to as face-to-face interviews, and can either be a structured conversation covering the salient points as both interviewer and interviewee discuss the topic. Or, it can be a question and answer session whereby the interviewer asks a question and waits for a response before proceeding to the next question. This method generates a high response rate, but is time consuming, costly and an interview can introduce, albeit inadvertently, bias to the respondents answers (Smith, 1997). Introducing bias has long been recognised as the primary means of undermining the reliability of this research instrument. The sources of bias are many and varied.

- The attitudes and opinions of the interviewer may affect responses to the questions.
- It is also possible that the interviewer may misrepresent the interviewee in recording their responses, or that the interviewee may not fully understand the question posed.
- The ethnic origin, religion, age and social class of the interviewer or interviewee can also introduce bias.
- The interviewer can influence responses through the use of visual and vocal stimuli, such their tone of voice or facial expression.
- Ultimately interviewers can suggest answers to interviewees, thus putting answers into the respondent's mouth.

(Finn, Elliott-White & Walton, 2000, pp.91-92)

Trained interviewers therefore must strive to present questions in as similar a manner as possible which are understood in the same way by everyone (Oppermann, 1992).

6.6.1.2 – Telephone surveys

A telephone survey is an alternative to the face-to-face interview technique. Again the interview can be either a structured conversation covering the salient points as both interviewer and interviewee discuss the topic. Or it can be a question and answer session whereby the interviewer asks a question and waits for a response before proceeding to the next question. However, the response rate can often be low as a telephone interview can be viewed as intrusive as it is often uninvited and enters the home directly (Sapsford, 1999). It also introduces a bias towards those possessing a telephone and are only suited to shorter surveys lasting no more than 15 minutes (Finn, Elliott-White & Walton, 2000).

6.6.1.3 – Postal questionnaire

Mail back questionnaires or more commonly referred to as postal questionnaires is probably the most commonly used survey research in tourism, as the basic mechanics of this method are easily understood and undertaken (Veal, 1996). Postal surveys are self-administered by respondents; as such they are relatively inexpensive. They are also a highly effective means of reaching a large sample population quickly. Denscombe, (1998 p.88) suggests that a questionnaire should be used if the following apply:

- When used with large numbers of respondents in many locations.
- When what is required tends to be fairly straightforward information – relatively brief and uncontroversial.
- When the social climate is open enough to allow full and honest answers without requiring personal, face-to-face interaction.
- When time allows for delays caused by production, piloting, posting and procrastination before receipt of a response.
- When responses allow for the cost of printing, postage and data preparation.
- When the respondents is expected to read and understand the questions - the implications of age, intellect and eyesight need to be considered.

The key to a successful postal survey lies in the design of the questionnaire. As this survey method lacks an interviewer, instructions are essential to provide respondent's sufficient guidance as there is no opportunity to clarify concerns that the interviewee may have. However, instructions should be limited to how the questionnaire is to be completed, timescales and a returning address. If too much information is provided there is a danger that bias may be introduced as focus on a particular variable my lead respondents (Sapsford, 1999). The postal questionnaire has additional disadvantages. The response rates are often low and due to the fact that the respondent completed the questionnaire in privacy the researcher can never be sure if the selected respondent completed the questionnaire (Finn, Elliott-White & Walton, 2000).

6.6.1.4 – The research instrument used within this research

With this research providing an analysis of the entire U.K. conference sector, the survey population is therefore geographically dispersed. As such the time-scales and financial resources did not permit face-to-face interviews. Additionally, the time-scales and costs involved in telephoning conference venues were also deemed unacceptable. Denscombe, (1998) identified six situations suited to postal questionnaires, as highlighted in Section 6.6.1.3, all of Denscombe's suggestions apply to this research. Due to the disadvantages of other survey methods and the applicability of postal surveys to the survey population, specifically that postal surveys are relatively inexpensive but highly effective at reaching a large survey population, this research employs a postal questionnaire as the research instrument. "The primary advantage of the mail survey is that it is usually less expensive to administer to widely dispersed populations because of standardised postage rates and low labour costs" (Frey, 1989, p.39).

6.6.2 – Designing the research instrument: the questionnaire

"A well planned and carefully constructed questionnaire will increase the response rate of your study and also will greatly facilitate the summarisation and analysis of the collected data" (Berdie & Anderson, 1974 p.31). A questionnaire must have a focus to which the questions within it relate (Mutchnick & Berg, 1996). This focus is dependent upon the topic of the research, but it is essential not to collect unnecessary or useless data as this increases the respondent's burden (Salant & Dillman, 1994). Each question must have a valid reason for being included; the content of the questionnaire must be relevant and of interest to the recipient, any question that does not have an obvious aim will lead the respondent to either leave it unanswered due to confusion or provide an answer to what they believe the question means. The final questionnaire will reflect the aims, objectives and hypotheses that are central to the research. Finn, Elliott-White & Walton, (2000, p.94) state that the design of questions that are to be included within a questionnaire are products of a staged process.

- Define the concept.
- Break the concept into a number of dimensions.
- Develop indicators for each dimension.
- Select one (or more) indicators for each dimension.
- Design questions to collect information for each indicator.
- Pre-test the questions in order to ensure that they are valid and reliable.
- The resultant questions form the variables in the data analysis.

Finn, Elliott-White & Walton, (2000, p.94).

The resultant questions included in a questionnaire can either be open-ended or closed (Veal, 1992). Where the former permits the respondents to express themselves freely, compared to the latter which has pre-coded answers. The advantages of closed questions are that they are quick to answer and easier to analyse. Closed questions have the disadvantage that if sufficient options are not presented to the respondent they may be forced to choose a response that only partially reflects their true answer (Fink & Kosecoff, 1998).

Open questions enable the respondent to express themselves, this particularly applicable when the question concerns the respondent's opinion. However, such open questions provide problems within the analysis stage of the research. Should respondent's answers be cited verbatim or grouped based upon a dominant characteristic, thus detail is lost (Dillman, 2000). Additionally, response rates to open ended questions are can be very low, as respondents do not have the time to construct free-form answers (Veal, 1992).

Another important questionnaire design characteristic is that of question scaling. Where opinion or attitudes are measured, a scale is often employed. At its simplest scales have two possible answers, either YES/NO or AGREE/DISAGREE. Both Likert and semantic scaling are widely used within the tourism domain (Moser & Kalton, 1989). A Likert scale is used in many questionnaires that seek respondent's opinions. A Likert scale enables the respondent to express their degree of support or rejection of a particular variable, through the use of terms such as agree strongly, agree, undecided, disagree or disagree strongly (Likert, 1970) Such a scale is popular as it is easy to construct and administer (Fink & Kosecoff, 1998). Each degree of support / rejection is given a numerical value from one to five. Thus a total numerical value can be calculated from all the responses (Cultsock nDirect, 2005 online), and thus qualitative views can be converted to quantitative data (Ciadvertising, 2005 online). The success of the scaling can be evaluated through standard techniques of item analysis, reliability analysis and factor analysis (Wang, 2005 online).

Another widely used method of scaling is semantic differentials, which uses opposing adjectives within a diagrammatic representation, such as clean – dirty, fast – slow or safe – unsafe, with a scale between these opposing adjective which the respondents indicates (refer to Figure 6.3). This method can be applied to a large number of variables easily, however, care should be taken when the adjectives are selected to ensure that they are meaningful and appropriate (Finn, Elliott-White & Walton, 2000).

How do you rate the conference venue? Please tick

	1	2	3	4	5	
Clean						Dirty
Fast						Slow
Safe						Unsafe

Figure 6.3 – Semantic differentials

(Finn, Elliott-White & Walton, 2000, p.96)

A further crucial factor in the success of any postal survey is that of questionnaire length (Fink & Kosecoff, 1998; Dillman, 2000). The perception that greater questionnaire lengths resulted in lower response rates led to the examination of the relationship between numerous questionnaire lengths and their response rates. The results of this investigation can be seen in Figure 6.4.

	Response Rate (%)	Effect of Length (%)
Experiment One (Dillman, Sinclair & Clark, 1993)		
Large postcard, one side (2 questions/person)	70.9	
One legal sized sheet, both sides (5 questions/person)	71.4	+0.5
8-page booklet (two sheets folded) (7 questions/person)	66.8	-4.6
Experiment Two (Dillman, Singer, Clark & Treat, 1996)		
8-page booklet (as Experiment 1)	67.2	
28-page booklet, log form	55.9	-11.3
Experiment Three (Leslie, 1996b)		
4-page booklet (one sheet folded, 5 person spaces)	75.6	
12-page booklet (three sheets folded, 7 person spaces)	75	-0.6
28-page booklet (seven sheets folded, 7 person spaces)	67.2	-7.8
44-page booklet (11 sheets folded, 7 person spaces)	62.2	-5.0

Figure 6.4 – Effects of different questionnaire lengths on response rates

Source: cited in Dillman, 2000, p.305

The results shown in Figure 6.4 are revealing in several ways. In general the greater the questionnaire length the lower the response rates (Dillman, 2000). Although shortening an already brief questionnaire may not result in a noticeable change in response rates. Experiment one identified that there was no statistical difference between a large postcard and a legal-sized questionnaire printed on both sides (Dillman, Sinclair & Clark, 1993). Dillman (2000) forwards the view that a questionnaire can be too short and thus the meaning and focus is lost, resulting in the respondents disassociating with the questionnaire. Additionally, experiment three identified that there were similar response rates to four and 12-page booklets, 75.6% and 75% respectively (Leslie, 1996b). Overall these experiments concerning the length of questionnaires and the response rates highlights that lower response rates are indeed witnessed if longer questionnaires are used. However, the placing of more questions on a single page than is visually acceptable in order to achieve a 'short' questionnaire will also have a negative effect on response rates (Dillman, 2000). Adams & Gale (1982, cited in Mangione 1995) made comparisons of surveys with one, three and five pages. Furthermore, they found no difference in response rates for the three and five page survey. A review by Heberlein & Baumgartner (1978, cited in Mangione 1995), which studied 98 methodological studies, documented no correlation between length measures and overall responses.

6.6.2.1 – The questionnaire used within this research

Objective One in Section 1.3 states this research shall outline the characteristics that could be used to define four venue classifications within a single typology for the U.K conference sector. On the basis that this research puts forward the view that four venue classifications exist within the U.K. conference sector and in order to achieve the stated objective, four questionnaires were designed, one for each venue classification. The four questionnaires have a very similar layout; the same questions are predominantly used in order that comparisons across the venue classifications could be made. However, each questionnaire has specific questions referring to the conference venue classification in question. It is important to have factual questions that are similar throughout the four questionnaires, as Bechhofer & Paterson (2000, p.76) identified, "factual questions simply illustrates that valid comparisons are easier when opinions do not intrude".

As a high response rate is important to the success of any research (Fink & Kosecoff, 1998), other questionnaires, particularly surveys from the BTA and the British Association of Conference Destinations (1999), which had gained a good response rate, were examined not only for content, but also other characteristics such as layout and length. Based upon these previously successful surveys and the reasons discussed in Section 6.6.2, that closed questions are quick to answer and easier to analyse. While open ended question provide problems within the analysis stage of the research and are prone to low response rates due to the unwillingness of respondents to complete free-form answers (Fink & Kosecoff, 1998; Dillman, 2000; Finn, Elliott-White & Walton, 2000), the majority of questions are closed-ended. However, the final two questions were open-ended, in order that respondent had the opportunity to view their own opinions regarding their venue classifications and the overall U.K. conference sector.

Finn, Elliott-White & Walton's, (2000) 'staged process', as described in Section 6.6.2, was applied in order to establish questions that possessed a valid reason for being included. In doing so the already defined research aim, objectives and hypotheses were broken down into a number of dimensions, for which suitable indicators were selected. In the vast majority of variables, succinct questions were provided after which tick boxes along with a number of options were presented to the user. An example can be seen in Figure 6.5.

8. **What products are offered to delegates?** (✓ more than one box if applicable).

- ❑ Basic equipment (including OHP, white board & flip charts)
- ❑ Audio-visual equipment
- ❑ Technical support
- ❑ Translation services
- ❑ Video-conferencing facilities
- ❑ Convention bureau
- ❑ Other, please specify…………………………………………………………

Figure 6.5 – An example of closed-question used within this research

In all cases instruction for the respondent was provided. With regards to Figure 6.5, the instruction of '✓ more than one box if applicable' was provided. Additionally, any list of options cannot realistically be exhaustive if concerns regarding questionnaire length and response rates are to be addressed (Dillman, 2000). To cater for respondents disclosing additional information the last option to any tick box list is 'other, please specify' which permits the respondents to provide additional relevant information in free-form. Where opinions were required from respondents, the questionnaire made use of the Likert scale, rather than semantic differentials due to concerns as to whether the adjectives selected would be meaningful and appropriate across the U.K. conference sector. If differing adjectives were used for different venues type then comparison would not be possible (Finn, Elliott-White & Walton, 2000).

The issues regarding questionnaire length, as highlighted by the studies of Dillman, Sinclair & Clark (1993), Dillman et al (1996), Leslie (1996b) and Dillman (2000) were also accepted in the compilation of the research questionnaire. In light of Leslie (1996b) identification that there were similar response rates to four and 12-page booklets, 75.6% and 75% respectively, the average questionnaire page length, excluding covering letter, was six pages.

6.6.3 – Pre-testing the questionnaire through a semi-structured interview

A small sample can be used to pre-test the survey instrument of a larger sample (Sudman, 1976). A pre-test using a sample of critical units (e.g., experts) can identify problem questions and these can be corrected before the larger survey is implemented. Thus in order to establish whether or not respondents would understand the questions and measures used and also provide appropriate responses, the questionnaires were 'pre-tested'. Pre-testing should cover the following issues;

1. Have all the necessary questions been included?
2. Can some of the questions be eliminated?
3. Have categories been used that will permit comparisons to be made?

(Dillman, 2000, p.140).

This involves providing the questionnaires to an individual that is similar to the target population and obtaining feedback from the pre-tester (Finn, Elliott-White & Walton, 2000). As the research process in Figure 6.1 highlights, part of the process of creating the research instrument was semi-structured interviews and this pre-testing of the questionnaire was achieved through a semi-structured interview.

This semi-structured interview involved a cogitative interviewing technique, whereby the pre-test interviewee is asked to respond to each question in front of the interviewer, by speaking out loud their answer to the question. The interviewer is then able to probe further the interviewees understanding of the question, in order to establish whether or not the intent of the question is clearly realised. This method is effective in establishing problems with self-administered questionnaires (Forsyth & Lessler, 1991).

This semi-structured pre-testing interview took place with conference manager of the Suncliffe Hotel in Bournemouth. The author had previously visited this hotel in a lecturing capacity, thus a working relationship with hotel management was already in place. Additionally, the hotel was strategically chosen, as it was a privately owned hotel which had originally offered conference facilities through a refurbishment programme in 1976. In that year Suncliffe hotel built two additional stories, which were originally designed to provide executive suits with sea front views and a ballroom. However, due to increased demand for conference facilities in the town, the construction of the BIC and neighbouring hotels offering conferencing facilities, the Suncliffe Hotel converted the two new floors into conference facilities in 1986. At the time of writing, the Suncliffe Hotel is in the process of planning the upgrade and modernisation of its existing conference facilities with the aim of improving its competitiveness and increases its delegate's capacity. The hotel has rejuvenated its lifecycle by re-orientating towards conference tourism in the mid 1980s, but has experience minimal refurbished since. At the time of writing it was accepted by the management that the Suncliffe Hotel was in need of further refurbishments, as such it did not attract many conferences. The management of this hotel expressed a desire to be actively involved with the research as it was deemed beneficial to the future development in their hotel. As such this hotel was considered acceptable for the pre-test interview.

The Suncliffe Hotel conference manager expressed concerns that the questionnaire contained questions concerned with the collection of commercially sensitive financial data, and also expressed concerns over the questionnaire length. These concerns were accepted by the author, however, in order to gain comprehensive view of the U.K. conference industry, it was deemed acceptable at this initial stage in the pre-test and piloting phase of the research to issue questionnaires requesting financial data.

When undertaking a pre-test interview care should be taken not to introduce bias, not only from the interviewer, but also interviewee. In order to diminish any bias that may be introduced from the pre-testing interview with the conference manager of the Suncliffe Hotel, the interviewee comments were not the sole source of review. The questionnaire combined not only pre-test comments but also the lessons learned from previous successful self-administered questions, such as surveys from the BTA and the British Association of Conference Destinations (1999), which had gained a good response rate.

6.7 – The research sample

Having identified and constructed the research instrument, Figure 6.1 also highlights the need to establish the research sample as part of the overall research design process.

6.7.1 – The size of the U.K. conference sector population

Estimates have been made as to the size of the U.K. conference sector, however, as stated in Section 1.4.1 to 1.4.3 there is a lack of coherent and accurate data within the conference sector. Rogers (2003) estimated that there were approximately 5,000 venues within the British Isles, whereas Robinson & Callan (2003; 2005) estimate the number of U.K. conference venues to be 3,888. The British Association of Conference Destinations (cited in Ladkin & Spiller 2000) state that there are approximately 4,000 conference venues in the U.K. The issue is surmised by Law (1993, p41) who states "Conferences do not have to be registered, so that the numerous small ones can go undetected by a tourist board which is attempting a count". There is no single source that includes all conference venues from the four venue classifications. In order to obtain a definitive address list, the author used a number of sources;

- The Venue Directory
- The Green and Blue Book publication.
- Secondary sources included U.K. conference bureaus and local authorities
- Conference addresses were also collected from journals, trade magazines and BTA publications.

Figure 6.6 shows the process of identifying four mutually exclusive lists, one for each venue classification being studied, with no duplication and no venue appearing in more than one list. The process involves combining all venues into a single list using Microsoft Excel, in doing so duplicate entries are evident and thus removed. Once the list of venues is free from duplication, each venue is classified into one of the four classifications under study.

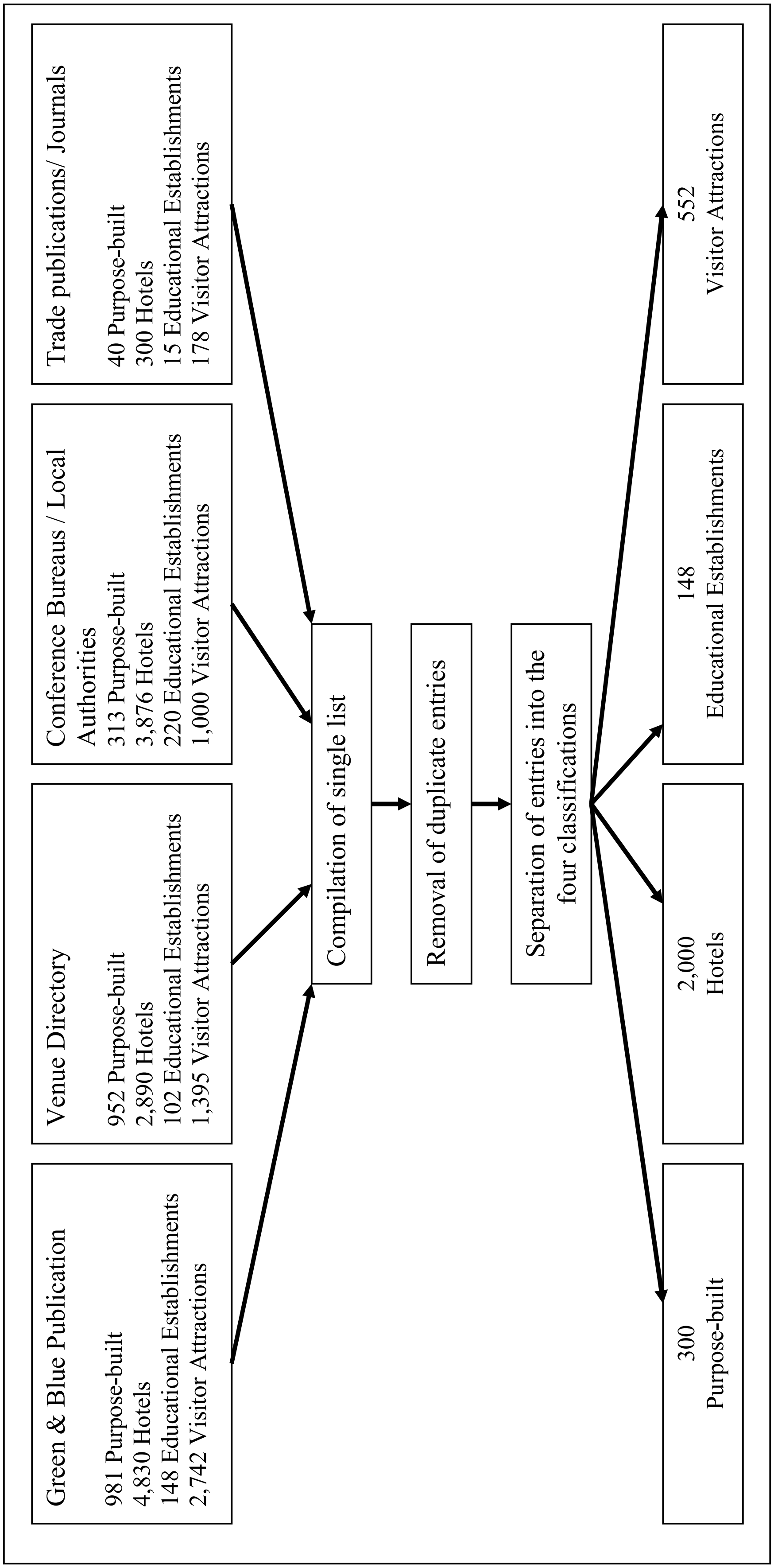


Figure 6.6 – The research population survey selection process

In the majority of cases this was achieved by using the venues original classification from the publication in which the venue was obtained. However, there were issues as within some classifications there were clearly errors, as shown in Table 6.5.

Table 6.5 – Inaccuracies within venue sources

	Green & Blue Book (www.venuefiner.com)	Venue Directory (www.venuedirectory.com)
Purpose-built	Albert Hall Concert Venue Alton Towers	Butlin's Holiday homes Clare Inn Hotel Crystal Palace Sports Centre
Educational Establishments	National Concert Hall National Heart & Lung Institute National Maritime Museum	Bletchley Leisure Centre Edinburgh Conference Centre Fleet Air Arm Museum
Visitor Attractions	Ashdown Hotel Bolton Woods Hotel	De Vere Hotels Hanover International Hotels

It is clear from Table 6.5 that many venues are listed in more than one category within the venue listing literature. For instance, within the Green & Blue book website (www.venuefinder.com) Alton Towers, which describes itself as being "one of the worlds leading theme parks" (Alton Towers online, 2004), is also classified as a purpose-built conference venue, but it is clearly a visitor attraction.

Whilst in the Venue Directory (www.venuedirectory.com) Bletchley Leisure Centre, Edinburgh Conference Centre and the Fleet Air Arm Museum are all listed as educational establishments. Where this occurred, the name of the venue or the use of the internet was used to classify the venues into appropriate categories.

The survey population used within this research is therefore a consolidation of the published conference venue literature. From Figure 6.6 it can be seen that the sub-division of the venue list resulted in a survey population of the U.K. conference sector of 3,000 venues. As the research aims to provide an analysis of the U.K. conference sector and both time and financial constraint permitted an extensive survey, it was deemed appropriate and acceptable to send questionnaires to all 3,000 venues to gain the widest geographical spread covering venues from all four classifications. Of these 3,000 conference venues, there are 300 purpose-built venues, 2,000 hotels with conference facilities, 148 educational establishments with conference facilities and 552 visitor attractions with conference facilities from the total survey size.

It should be noted that in response to authors such as Crouch & Housden (1996) and Sudman (1976) who forward the view that defining a population too narrowly can make it difficult, if not impossible, to obtain a list of the individual elements, as such no sub-group should be less than 100. In support of this view and ensuring that this research remains valid, it can be seen that no single sub-group within this research was less than 100. Indeed the smallest sub-group is that of educational establishments at 148 venues.

6.7.2 – Size of the responding sample of U.K. conference venues

Krejcie & Morgan (1970) have produced a table for determining sample size, which is shown in Table 6.6.

No calculations are required to use the table, according to Krejcie & Morgan (1970). The sample size required to be representative of the opinions of 3,000 conference sector respondents is 341, where N = 3000 then n = 341 (highlighted in bold in Table 6.6). Krejcie & Morgan (1970) state that by using this calculation, as the population increases the sample size increases at a diminishing rate and eventually remains constant at slightly more than 380 cases. There is little to be gained to warrant the expense and energy to sample beyond about 380 cases.

Table 6.6 - Determining sample size

N - n	N – n	N - n	N - n	N - n
10 - 10	100 - 80	280 - 162	800 - 260	2800 - 338
15 - 14	110 – 86	290 - 165	850 - 265	**3000 - 341**
20 - 19	120 – 92	300 - 169	900 - 269	3500 - 346
25 - 24	130 - 97	320 - 175	950 - 274	4000 - 351
30 - 28	140 –103	340 - 181	1000 - 278	4500 - 354
35 - 32	150 - 108	360 - 186	1100 - 285	5000 – 357
40 - 36	160 - 113	380 - 191	1200 - 291	6000 – 361
45 - 40	170 - 118	400 - 196	1300 - 297	7000 – 364
50 - 44	180 - 123	420 - 201	1400 - 302	8000 – 367
55 - 48	190 - 127	440 - 205	1500 - 306	9000 - 368
60 - 52	200 - 132	460 - 210	1600 - 310	10000 – 370
65 - 56	210 - 136	480 - 241	1700 - 313	15000 – 375
70 - 59	220 - 140	500 - 217	1800 - 317	20000 – 377
75 - 63	230 - 144	550 - 226	1900 - 320	30000 – 379
80 - 66	240 - 148	600 - 234	2000 - 322	40000 – 380
85 - 70	250 - 152	650 - 242	2200 - 327	50000 – 381
90 - 73	260 - 155	700 - 248	2400 - 331	75000 – 382
95 - 76	270 - 159	750 - 254	2600 - 335	100000 – 384

(Krejcie & Morgan, 1970 p.608)

Whereas Alreck & Settle (1985) acknowledge that utilising more than a 10% sample is rarely necessary. However, as Table 6.6 shows, Krejcie & Morgan's table only provides values for limited set of survey population values. It does provide a comprehensive list, thus rounding up or down is required to obtain a sample size value for a survey population between the values stated (Robinson & Callan, 2003a, 2003b).

This rounding was deemed unacceptable due to the inherent error associated with rounding and as such with regards to the minimum number of responses from *each of the sub-groups*, Saunders, Lewis & Thornhill (1997) suggest a mathematical model for the precise minimum sample size, which is based on the following criteria.

- The level of confidence in the estimate.
- The margin of error permitted.
- Proportion of responses expected to possess a specific attribute.

The *minimum sample size* is expressed in Figure 6.7

$$N \quad = \quad P\% \quad \mathrm{X} \quad q\% \quad \mathrm{X} \quad \frac{(\ Z\ )^2}{(\ e\%\ )}$$

Figure 6.7 – The minimum sample size

Cited in Saunders, Lewis & Thornhill, 1997, p.27

where
n is the minimum sample size.
p% is the proportion belonging to the specified category.
q% is the proportion not belonging to the specified category.
Z corresponds to the level of confidence required (refer to Table 6.7)
e % is the margin of error.

Table 6.7 – Levels of confidence and associate **z** value.

Level of confidence	z value
90% certain	1.65
95% certain	1.96
99% certain	2.57

Cited in Saunders, Lewis & Thornhill, 1997, p.28

Where the survey population is less than 10,000 then a further adjustment can be made without affecting the accuracy, this is referred to the *adjusted minimum sample size* and is expressed in Figure 6.8.

$$N' = \frac{N}{1 + \left(\dfrac{n}{N}\right)}$$

Figure 6.8 – Adjusted minimum sample size

cited in Saunders, Lewis & Thornhill, 1997, p.29

Therefore, knowing that there are 300 purpose-built conference venues, 2,000 hotels, 148 educational establishments with conference facilities and 552 visitor attractions with conference facilities out of a survey population of 3000, the number of expected responses are shown in Table 6.8.

Table 6.8 – Estimated number of usable returns

	Purpose Built	Hotels	Educational Establishments	Visitor Attractions
Proportion belonging to category	10	33.33	4.9	18.4
Proportion not belonging to category	90	66.67	95.1	81.6
95% certain	1.96	1.96	1.96	1.96
Margin of error	8	6	16	5
Minimum sample size	54.02	237.12	22.53	71.61
N'	54.02	237.12	22.53	71.61
N	3000	3000	3000	3000
Adjusted minimum sample size	53.06	219.75	22.36	69.93

Therefore using the Saunders, Lewis & Thornhill (1997) mathematical sample size determinant, this research should expect to receive;

- 53 responses from purpose-built venues at 8% margin of error.
- 219 responses from hotels with 6% margin of error,
- 22 from educational establishments with 16% margin of error
- 70 from visitor attractions and with 5% margin of error.

Differing margins of error have been used in order to obtain an acceptable level of valid responses for each of the four venue classifications. This margin of error indicates the confidence in the data and it can be seen that educational establishments have the lowest level of confidence in order to obtain a valid number of responses, in that the margin of error had to be set at 16% in order to get adjusted minimum sample size of 22.

Although some of these responses may be viewed as small, previous research within the conference industry highlights that small usable sample sizes have been used and small response samples obtained. Robinson & Callan (2002) cite a number of studies carried out within the conference sector, such as Reneghan & Kay (1987) who had a sample size of 111 meeting planners, Riley & Perogiannis (1990) questioned 82 conference managers and 74 hotel managers, receiving replies from 33 conference managers and 45 hotel managers.

6.8 – Data collection

The third of the four essential steps to the research process, as outlined in Section 6.2 is that of data collection. There are a number of stages involved in the collection of data, the first stage being the undertaking of a pilot survey.

6.8.1 – Pilot survey of the U.K. conference sector

The design of a postal questionnaire survey is not without its shortcomings and problems. Numerous drafts of the questionnaire were made to improve its design and content. As Hoinville & Jowell (1978) commented, many unseen factors affect survey accuracy so its validity must be demonstrated rather than accepted as an act of faith. To test the design of the questionnaire a pilot survey took place. Although numerous textbooks (Krejcie & Morgan, 1970; Fink & Kosecoff, 1998; Dillman, 2000) identify representative sample sizes, few textbooks identify any methodology for determining the representative number of questionnaire to distribute for the piloting of a survey. Finn, Elliott-White & Walton (2000, p.102) state that “25 interviews or questionnaires are usually sufficient”, whereas Dillman (2000, p.146) states that “For a pilot study, a sample of 100 to 200 respondents are drawn". Textbooks covering the subject of piloting survey convey the message that a pilot study is a useful test of the end-to-end process involved in the dissemination and collection of questionnaires. Thus it is not simply to identify whether or not the questionnaire is reliable and valid, which in part should have been addressed at the pre-test stage, but it is also a test of mailing address lists and return of survey procedures (Veal, 1992; Dillman, 2000).

With the testing of this end-to-end process in mind, it was deemed appropriate to mail two questionnaires to educational establishments which is equivalent to approximately 1.3% of the overall educational establishment population. Similar proportions of purpose-built venues (four venues), hotels (27) and visitor attractions (seven) were also chosen using a random selection technique, i.e. each mailing address list was sequentially numbered and published random number tables (Finn, Elliott-White & Walton, 2000, p.250) were used to identify randomly selected addresses.

On the basis that it was deemed appropriate to select two educational establishment venues or 1.3%, along with four purpose-built venues, 27 hotels and seven visitor attractions, a total of 40 questionnaires were mailed as a pilot survey to randomly chosen addresses on the 26th February 2001. A covering letter was included to explain the purpose of the study and a return-by date of the 15th March 2001 was given. During this initial pilot study two questionnaires were returned. In reaction to the low level of response this initial pilot survey achieved, each of the non-responding venues were telephoned and the individual to whom the survey was sent was asked if they had received the questionnaire, many had not. Additionally, it was established that the contact name obtained from the address list was outdated; many had left their work place, even though the list was constructed in the same year as the survey.

It was suggested to those that were contacted by telephone whether the questionnaire should be addressed to the 'Conference Manager' rather than a named individual and a positive response was given. Therefore a further questionnaire was sent to each of the non-responding venues on the 16th March

2001. This time addressed to the 'Conference Manager', with no specific name given, in the hope of a higher response rate. Two weeks were given to fill in the questionnaire and for them to be returned.

From the second pilot study four questionnaires were returned. Comments obtained from respondents suggested that the layout of the original questionnaire was unacceptable. "The appearance and arrangement of the survey form itself is vital to a successful study" (Berdie & Anderson, 1974 p.31). It was felt that to improve the response rate the appearance of the questionnaire had to be improved. The questionnaire was redesigned into an attractive booklet. The booklet had a front cover, with headings to each section, which introduced the survey and the questionnaire was divided into ten sections. At the beginning of each section instructions were set out to aid the respondent how to answer the questionnaire. A further pre-test of the revised questionnaire took place, again with the manager of the Suncliffe Hotel, who comment's included the questionnaire length and the collection of commercially sensitive financial data. Similar procedures to prevent bias from being introduced were undertaken as discussed in Section 6.6.3.

As Berdie & Anderson (1974, p.53) state "plans to increase response rate should be tailored specifically to meet potential objections to the study; all available strategies (consistent with financial resources) should be implemented". It was agreed that to increase the response rate the questionnaire should be re-piloted again before the main survey could be send out. The revised questionnaire was sent out once again and as the questionnaire was newly redesigned, a further 40 randomly selected conference venues were selected in the same proportion as earlier pilot surveys. The response rate was higher at 15% or six responses. The response rates for the three pilot surveys can be seen in Table 6.9. From Table 6.9 it can be seen that with each phase of improvements and amendments to the questionnaire higher response rates were achieved.

Table 6.9 – The pilot survey response rates

Pilot survey	Number of questionnaires sent	Response rates
First	40	2 (5%)
Second	38	4 (10%)*
Third**	40	6 (15%)

* indicates percentage of original pilot survey where n=40

** indicates that the new, revised questionnaire was used

6.8.1.1 – Responses to financial questions

Overall responses obtained were positive throughout the questionnaire, with the questionnaire being completed to satisfactory level and thus deemed usable. One area of concern was highlighted, which supported the views forwarded by the conference manager of the Suncliffe Hotel, that of questions concerning the financial details of the venues. Although some venues did complete this section, these questions had the greatest levels of avoidance or incomplete answers due to confidentiality concerns. As these questions received some level of support and as this thesis is an analysis of the U.K. conference sector, in which the financial performance of the sector is an important part, it was felt that to retain these questions within the survey was appropriate. If, once the empirical fieldwork was complete, the response rates were unacceptable for these questions and then their use in the subsequent discussion and analysis is accepted as limited. It is therefore acknowledged that the inclusion of questions requesting financial data in the final questionnaire may, or may not, produce the desired results.

In reflection, although the pilot survey resulted in a low response rate, it did highlight the essential need for a pilot survey to identify any problems that were encountered by respondents. The initial questionnaire only achieved a 10% return rate after two mail shots. However, once the questionnaire was re-designed into a booklet, and the questionnaire was re-piloted, a response rate of 15% was achieved from a single mail shot. It is clear that piloting is an essential part of the overall research process.

Based on the findings of the pilot survey, if this research was to be repeated by the author, the author would accept the Suncliffe Hotel conference manager's concerns regarding the collection of commercially sensitive financial data, with questions regarding financial data would be excluded from any future questionnaires. Additionally, concerns expressed over the questionnaire length would have been accepted at the pilot stage.

6.9 – The main survey

Based on two pre-testing interviews, three pilot surveys and the review of the relevant literature, the four final questionnaires used within the empirical data collection phase reflected the aim, objectives and hypotheses that are central to the research and can be seen in Appendix C, Figures 6.9 to 6.12 (refer to pages 414, 424, 437 and 448).

The main body of the surveys were allocated three months for completion, from June to August 2001 inclusive, this period included the sending of reminders. Nixon (1954) cited in Berdie & Anderson (1974, p.57) suggest that "the official name of the sponsoring organisation should be on the letterhead to all correspondence, introducing the questionnaires". Although the London Chambers of Commerce and Industry Commercial Educational Trust (LCCICET) and the Bournemouth University logo's were not printed on the front of the questionnaire booklet, the Bournemouth University letterhead appeared on the covering letter sent with questionnaires, (Figure 6.13 in Appendix C, refer to page 459). This letter was sent with the appropriate questionnaire, along with a returning stamped addressed envelope to the 3,000 conference facilities throughout the U.K. The letter introduced the Meetings, Incentives, Conferences and Exhibitions (MICE) Research Unit of Bournemouth University and outlined the aims of the research. The letters and questionnaires were sent on the 8th June 2001, with a three-week deadline to be returned. Based on the lessons learned in the pilot surveys, the addressee was set as 'The Conference Manager'.

After the three weeks 10% of the initial questionnaires had been returned completed. A cross section of non-respondents who failed to complete their questionnaire was telephoned. In telephoning the remaining relevant venues a name of an appropriate individual who could complete the questionnaire was obtained. To those 2,700 venues remaining in the survey population and who had not returned their questionnaire a reminder, addressed to the name obtained, was sent with an additional copy of the questionnaire and a further stamped addressed envelope. This first reminder was sent on the 2nd July 2001 with a further three-week returning period.

Mangione, (1995, p.55) suggests,

> *"You want to plan your first reminder to arrive at the respondents' addresses just at or about the 14th day. After sending out a reminder there will be a few days of no impact, then a burst of returns with more coming in each day and then a precipitous decline at about 14 days after the second mailing (the 1st reminder)".*

A second reminder with a copy of the questionnaire letter was sent to 2,571 in early August 2001, but no stamped addressed envelope was enclosed due to financial constraints.

6.9.1 – Problems encountered with regards to the return of questionnaires

The rate of response was initially very slow, which led to initial concerns that an acceptable response rate would be achieved. Thirty conference venues stated they were too small to be of any use in the questionnaire and returned the survey unanswered. A subsequent telephone call to each of them, explaining that the survey aimed to achieve a sector-wide response including both large and small venues failed to gain any positive replies.

The issue concerning the length of the questionnaire was the main reason why respondents returned questionnaires incomplete. Many completed the first few pages before ceasing and stating that the time involved in collating historical information concerning the number of conferences held limited their ability to complete the questionnaire. Some respondents stated that such historical data would take days to compile, due to resource limitations and/or poor storage of such data. Two sections within the questionnaire received poor responses. The collection of financial information was particularly difficult to obtain, but this was expected as the pre-test interviews and pilot survey had highlighted such issues. As Law (1993, p.41) stated "Many hotels are unwilling to release details of the conferences they have hosted because of commercial confidentiality". The second section that received poor responses was the historical data required for the number of events held during a four-year period. Numerous respondents replied stating that this question was too time consuming to complete due to the lack of administrative record keeping.

The overall survey population was 3,000 of which 438 replies were deemed valid. This gives an overall response rate of 14.6%. This can be broken down between the four venue classifications as seen in Table 6.10.

Table 6.10 – Absolute and percentage return rates

Type of venue	Purpose Built	Hotels	Visitor Attractions	Educational Establishments	Total Number of venues
First mail shot	300	2000	552	148	3000
Total returned, first mail shot	40	198	48	14	300
Total returned, second mail shot	51	280	75	23	429
Total returned, At survey close	53	286	75	24	438
Overall response rate (5)	17.6	14.3	13.6	16.2	15.4

(n=3000)

The purpose-built conference venue survey population was 300, of which 53 responded, giving a response rate of 17.6%. This compares to hotels, which had a survey population of 2,000, with 286 respondents giving a response rate of

14.3%. The visitor attraction survey population was 552 of which 75 responded, giving a response rate of 13.6% and the educational establishment's survey population numbered 148 of which 24 responded, giving a response rate of 16.2%. Response rates for the four venue classifications were therefore between 13.6% for visitor attractions to the highest of 17.6% for purpose-built conference venues, a difference of 4%. The response rates satisfying Alreck & Settle (1985) 10% criteria and also the Saunders, Lewis & Thornhill (1997) mathematical sample size determinant, discussed in Section 6.7.2 and thus response rates were sufficiently high enough to enable valid comparisons and contrasts. The actual and expected response rates using this latter mathematical model are shown in Table 6.11.

Table 6.11 – Actual vs. expected return rates

	Purpose Built	Hotel	Educational Establishments	Visitor Attractions
Expected	53 (8% margin of error)	219 (6% margin of error)	22 (16% margin of error)	70 (5% margin of error)
Actual	53	286	24	75

According to the sampling model the research should expect to receive 53 responses from purpose-built venues at 8% margin of error and indeed this was so. For hotels 219 responses were expected with 6% margin of error and 286 were actually received. For educational establishments with 16% margin of error 22 responses were expected and 24 were obtained. Finally, for visitor attractions, 69 responses were expected with 5% margin of error and 75 were obtained. Therefore the response rates were either equal or greater than the marginal error and Saunders Lewis and Thornhill (1997) mathematical sample size determinant (table 6.8) shall be used for this research.

In reflection, based upon the problems encountered during the main survey, changes to the questionnaire design would be made for any subsequent research utilising these questionnaires. These changes include reducing the number of questions considerably, from approximately 50 questions per questionnaire to approximately 25 questions. In doing so those questions used within the survey would be focused and more specific to the research aims and objectives. The current questionnaires contain numerous questions that covered a broad spectrum of subjects, and thus had the potential to confuse respondents. By reducing the number of question, the research may have gained a higher response rate, as respondents may not have been de-motivated by the survey length. A greater response rate would in itself ensure that the survey is a representative sub-section of the overall survey population. In providing a greater focus for respondents, subsequent analysis would have also been more focused and greater in-depth statistical analysis would have been possible within these research limitations. This current research contains a high number of questions, with this research attempting to undertake statistical analysis across a broad spectrum of questions. The current research undertakes a large amount of basic statistical analysis as each question was addressed, whereas if this research was undertaken again with fewer questions, a much more detailed statistical analysis would have been achievable.

Within the questionnaire design high response rates were achieved for closed questions. Where respondents were provided with a list of options to choose from, and they were required to simply mark the most applicable answer, response rates were higher. Additionally, where respondents were asked simple, specific open ended questions, such as the date of conference venue opening, response rates were also high. Low response rates were witnessed for historical data which required respondents to dedicate time to find the correct answers. Subjective open ended questions, such as "Why do you think there has been significant growth in the purpose-built conference venues?" gained few responses.

6.10 – Analysis and interpretation

The final stage in the research process outlined in Section 6.2 is the analysis and interpretation of data. The 438 questionnaires returned completed and considered usable were encoded and entered into SPSS (version 10.5) for analysis. Analysis of the data took two distinct forms, first through the use of descriptive statistics, frequencies, measures of central tendency (mean, mode and median) and indexes of dispersion (range and a standard deviation). Secondly, the data analysis utilised cross tabulations, chi-square analysis and forecasting. Analysis for each cross-tabulation will be comprised of three specific subdivisions. The first is a discussion on the general characteristics of the conference sector, highlighting the differences between the four venue classifications. Additionally, cross tabulations and statistical significance established via chi-square analysis, which in turn determines the statistical significance of the factors being analysed. Cross tabulations permit the identification of any relationship between the two variables being studied.

6.10.1 – Descriptive statistics

Numerous statistical textbooks (Babbie, 1990; Sapsford, 1999; Williams & Monge, 2001) detail and discuss both the methods and implications for establishing descriptive statistics including frequencies, measures of central tendency (mean, mode and median) and indexes of dispersion (range and standard deviation). As such a review of descriptive statistic is provided for summary purposes only and the reader is guided to the textbooks identified for further detail.

- Frequency – a count of the number of instances a variable is cited by respondents, expressed as marginals (i.e. 20 venues less then ten years old) or as a percentage (i.e. 5% of venues less than ten years old).
- Mean – the sum of the values in a distribution divided by the number of values.
- Mode – this is the simplest measure of central tendency, as it identifies the most commonly cited value within a survey response distribution. .
- Median – median is the central value in a distribution, with half the values above and below it.
- Range – is the simplest and crudest measure of dispersion. It provides an indication to the extent or spread of responses provided, but is obviously affected by extreme values.

- Standard deviation – is the most useful measure of dispersion as it utilises all the data in the dispersion. Standard deviation compares each value to that of the mean, indicating the variance around the mean. In doing so it can be identified how representative the mean is for the dataset. If the value of the standard deviation is small, then the more concentrated the data is around the mean, if the value is large the data is dispersed. It should be remember that the value of the standard deviation is in itself a reflection of the mean, thus if the mean is large the standard deviation may also be large (Finn, Elliott-White & Walton, 2000, p.178-182; Williams & Monge, 2001, p.36-41).

6.10.2 – Nominal or ordinal data

Within the four questionnaires utilised within this research the respondents are presented with a list of nominal variables, for instance the factors listed under the question which asks "please rank your conference services in order of importance. These listed factors are nominal as they are mutually exclusive, and can be listed in any arbitrary order (Hildebrand, Laing & Rosenthal, 1977; Dey, 1993). However, through the process of ranking these nominal factors in their responses, respondents provide ordinal data. The factors remain mutually exclusive, but the factors are now ordered or ranked. Therefore ordinal and nominal data are distinguished by the fact that for ordinal data factors are meaningfully ordered whereas for nominal data they are not (Lewis-Beck, 1993).

Once a factor has been awarded a ranking, then measures of central tendency can be applied, such as mean in order to identify the average ranking applied to any given factor. The mean or average, is the sum of all the sample values divided by the sample size, and is the best estimate of the underlying population (Dey, 1993). As the mean is calculated from all the sample values, it makes the maximum possible use of the available data. Alternatively, it can be influenced by any extreme values referred to as outliers. One method of dealing with the problem of outlying values is to use weighting or trimming in calculating the mean.

In the usual mean calculation, all the sample values are given the same weight (1/sample size) in the sum. This can be adjusted to using any collection of weights that sum to 1. For a trimmed mean a proportion (e.g., 10%) of the data at each end of the sample is trimmed off, and then the arithmetic mean is calculated for the remaining values. The 10% trimmed mean for a sample size of 20 would be the average of the middle 16 values. This is equivalent to weighting those 16 values equally and assigning weights of 0 to the other 4 trimmed values. (Quality Control Plan, 2005 online).

The advantages to using the mean of a data set as a descriptive statistic include the fact that the mean is the most commonly used "average", its basic calculation is easily understood, all data values are used in the calculation and the mean is used in many statistical procedures. The main disadvantage of the mean is that it can be too sensitive towards extreme scores. Clearly extreme scores can distort the mean and this becomes more prominent when the size of distribution is small (Cornish, 2002)

As the calculation of the mean value is dependent upon the size of the sample, trends can be identified as sample sizes get larger and larger. The British Columbia Institute of Technology (2005, online) undertook a series of tests whereby the sample size (n) increase incrementally. Pairs of values, hence n=2, where randomly selected and for each pair both the selected values and their average where recorded. Selection of pairs and the calculation of averages continued for 30 minutes. At the end of the 30 minutes, a histogram of the averages was produced, as seen in Figure 6.14.

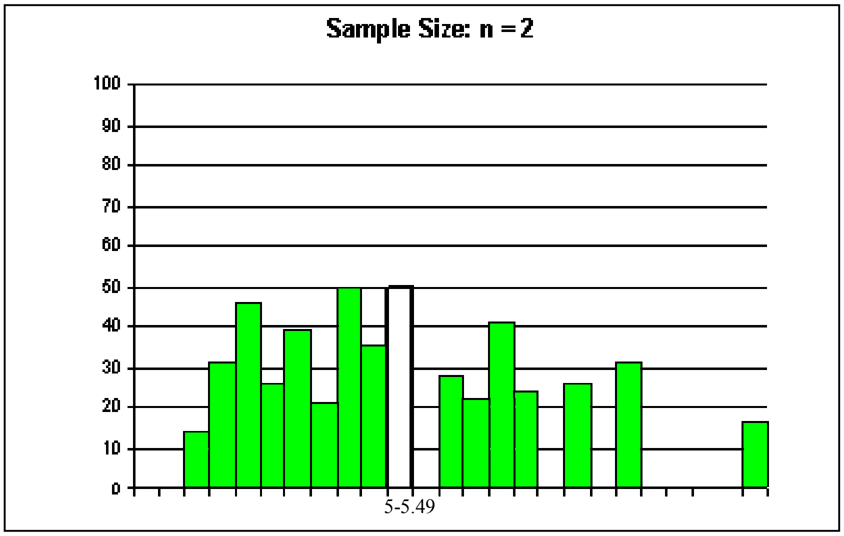


Figure 6.14 – Averages return where n=2
(Source: British Columbia Institute of Technology, 2005, online)

The class which would contain the population mean is not clearly seen, however, the average value fell between five and 5.49. The exercise was repeated with the value of n increasing to three, five and ten, i.e. three values were randomly selected and averaged, five values were randomly selected and averaged, and ten values randomly selected and averaged. Figures 6.15 to 6.17 show the average values returned.

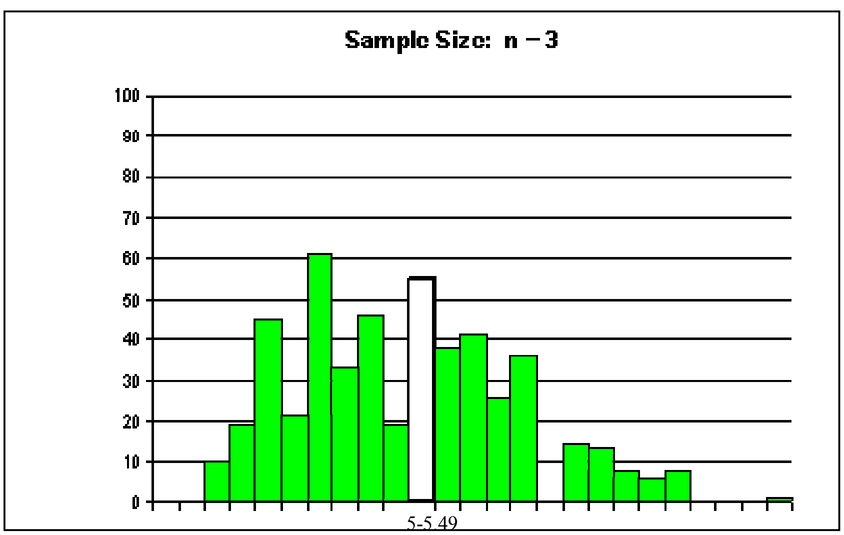


Figure 6.15 – Averages return where n=3

(Source: British Columbia Institute of Technology, 2005, online)

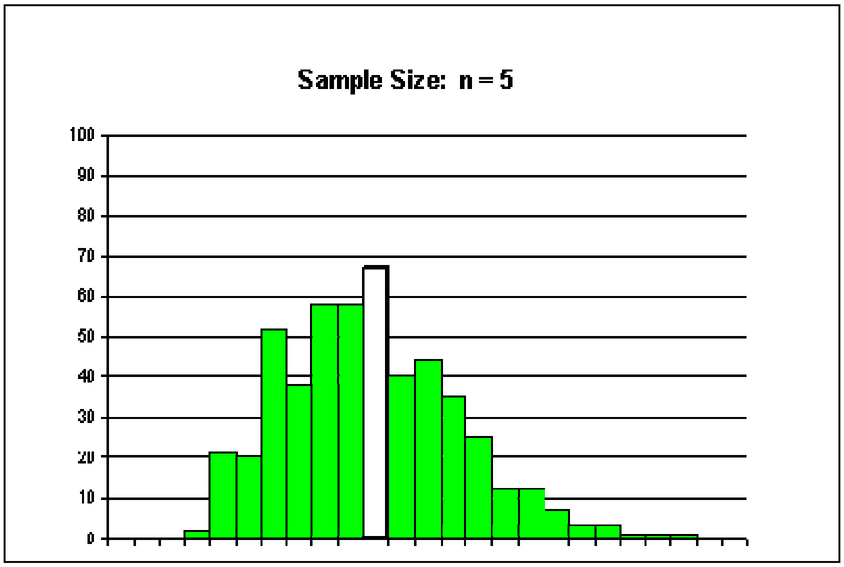


Figure 6.16 –Averages return where n=5

(Source: British Columbia Institute of Technology, 2005, online)

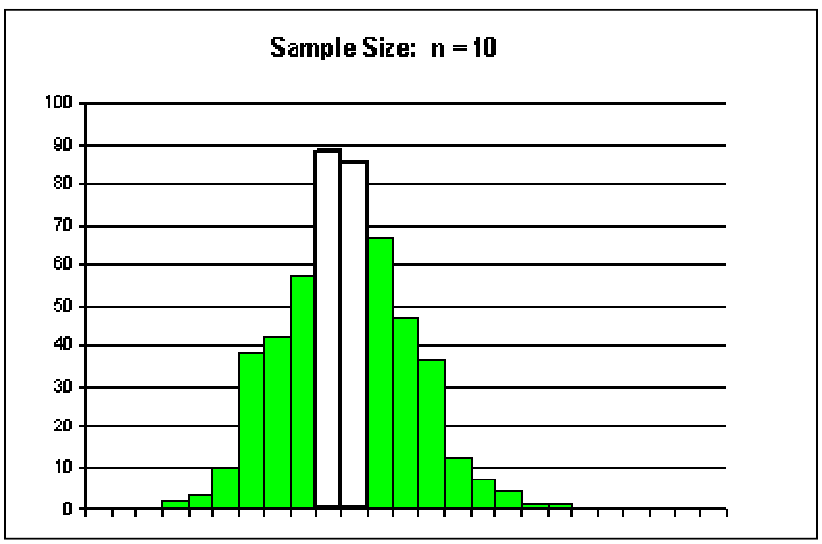


Figure 6.17 –Averages return where n=10

(Source: British Columbia Institute of Technology, 2005, online)

In Figure 6.15 there is an increasing amount of structure than in the n = 2 sample size case shown in Figure 6.14. Frequencies near the extremities are reducing, and those near the centre increasing. However, the highest class frequency still does not occur for the class containing the population mean. In Figures 6.16 and 6.17 there is an increasingly regular pattern. First, the sample means are increasingly clustering in the vicinity of the value of the population mean. In Figure 6.17 above, the two un-shaded columns span the interval 4.5 - 5.499, and clearly the high point of the distribution occurs more or less in the center of this region.

Secondly, the spread of values observed for sample means is narrowing as the sample size gets larger. Since Figures 6.14 to 6.17 above are all the same size, and they all have the same vertical scale, this trend to greater uniformity in sample means shows up by the development of patterns which are higher in the central region, and lower in the extremities.

Conclusions that can be drawn from an increasing (or decreasing) sample size on the samples' mean value are as follows;

- The distribution of sample means will be more and more (less and less) centred on the value of the actual population mean. That is, the mean of the sample means is the population mean.
- The amount of spread in the distribution of the sample means decreases (increases). (Source: British Columbia Institute of Technology, 2005, online)

Although the calculation of the means utilises all the values within the sample, where sample size is small care should be taken when interpreting the implications of the mean value returned within a given sample. As sample size increases so the mean value will increasing reflect the mean value of the

The median, in contrast to the mean, is less sensitive to extreme scores and represents the point that divides the distribution of scores into two equal halves. There are as many sample values above the sample median as below it. In order to do this, however, the scores must first be arranged in increasing order. When the number of observations in the distribution is odd the median is the middle score, however, when there is an even number of observations the median must be averaged using the values either side of the central observation., i.e. where four observations are seen; 2, 3, 4, 5 then the median is averaged between values 3 and four, thus the median is 3.5. Care should be taken in these instances as the median value returned is not actually an observed value (Cornish, 2002). As the median is calculated from only one or two data values, it is highly resistant, and may be preferred to the mean when dealing with skewed data. For skewed samples, the sample mean will be further toward the direction of skew than the median: above the median for samples skewed to the right, and below the median for distributions skewed to the left. (Quality Control Plan, 2005 online)

The advantages to using the median of a data set as a descriptive statistic are that the concept is easy to understand, the median can be determined for any data set and the median is not unduly influenced by extreme values in the data set. The disadvantages to using the median of a data set as a descriptive statistic are that it does not use all the information in the data and can be difficult to calculate., data must be arranged in an array (ascending or descending) and the median lacks the useful mathematical properties that make the mean the preferred (Cornish, 2002; Fanshaw, 2005, online)

The third measure, the mode is perhaps the least reliable of all three central tendency measures. The mode represents the most frequently occurring score in a distribution and is useful for categorical data. Samples from a continuous distribution may not have any repeated data values, so the mode is generally more informative with samples from discrete distributions. Fortunately, the majority of distributions are unimodal, that is, one score occurs more frequently than others. Less often, there is a bimodal distribution when a number of scores appear more than once. The main disadvantage of this measure is that it takes into account the least information about the distribution of scores (Calkin, S., 2005 online). The sample mode is less sensitive to skewness than either the sample mean or the sample median, but it is more subject to sample variation than either the sample mean or the sample median (British Columbia Institute of Technology, 2005, online).

The advantages to using the median of a data set as a descriptive statistic are that the mode can be obtained for any data set, easy to understand and not affected by outliers. The disadvantages to using the median of a data set as a descriptive statistic are that it not all sets of data have a modal value, some sets of data have more than one modal value, multiple modal values are usually difficult to interpret and the mode lacks useful mathematical properties (Cornish, 2002 online).

Some basic facts regarding the use of central tendency calculations are as follows.

1. Mean and median always exist and are unique.
2. Mode may not be unique or may not even exist.
3. Mean and median are very common and familiar.
4. Mode is used less frequently; midrange is rarely used.
5. Only the mean is "reliable" in that it utilizes every data element.

(Calkin, 2005 online)

Of the three measures of central tendency discussed, the mean is by far the most widely used (Hildebrand, Laing & Rosenthal, 1977). It takes every score into account, is the most efficient measure of central tendency for normal distributions and is mathematically tractable making it possible for statisticians to develop statistical procedures for drawing inferences about means. Alternatively, the mean is not appropriate for highly skewed distributions and is less efficient than other measures of central tendency when extreme scores are possible and where sample size is small. The mode can be informative but should almost never be used as the only measure of central tendency since it is highly susceptible to sampling fluctuations (Roe, 2005 online).

6.10.3 – Chi-square analysis

Chi-squared analysis can be used to test significance (Babbie, 1990), where significance is seen as the likelihood of a relationship between two variables arising by chance (Sapsford, 1999). The resultant value of a chi-square test (x^2) examines whether the *observed* frequencies of a given event, differ substantially from those frequencies that are *expected* according to the stated null hypothesis. The formula for calculating the actual and expected counts as well as the overall chi-squared value can be seen in any of the standard statistical textbooks, such as Gregory (1970) or Chapman-McGrew & Monroe (1993). The greater the aggregate difference between expected and actual counts the greater the value of chi-square. This value is then compared to standard published statistical tables in order to establish the level of significance. The relevant significant Figures are shown in Table 6.12.

Table 6.12 – Critical values of chi-square

Degrees of Freedom	Level of Significance				
	0.1	0.5	0.01	0.005	0.001
1	2.71	3.84	6.64	7.88	10.83
2	4.60	5.99	9.21	10.60	13.82
3	6.25	7.82	11.34	12.84	16.27
4	7.78	9.49	13.28	14.86	18.46
5	9.24	11.07	15.09	16.75	20.52
6	10.64	12.59	16.81	18.55	22.46
7	12.02	14.07	18.48	20.28	24.32
8	13.36	15.51	20.09	21.96	26.12
9	14.68	16.92	21.67	23.59	27.88
10	15.99	18.31	23.21	25.19	29.59
11	17.28	19.68	24.72	26.76	31.26
12	18.55	21.03	26.22	28.30	32.91
13	19.81	22.36	27.69	30.82	34.53
14	21.06	23.68	29.14	31.32	36.12

Source: William & Monge, 2001, p.222.

The level of significance is the value above which the result obtained cannot be attributed wholly to sampling. If it cannot be attributed to sampling there must be a relationship between the two factors being examined. The accepted level of ‘statistical significance’ is set at 5% (William & Monge, 2001). This means that the result of the test has only a 5% chance of being produced through sampling and thus a 95% chance of being attributed to a relationship. For the relationship to be highly significant it must exceed the 1% level. Associated with this level of significance are the ‘degrees of freedom’, which relates to the size of the data set and is calculated using the equation, shown in Figure 6.18.

(Number of rows - 1) x (Number of columns -1)

Therefore

3 (rows) - 1 x 2 (columns) - 1

=

2 x 1

=

2 degrees of freedom

Figure 6.18 – The calculation of degrees of freedom

Source: Babbie, 1990, p.300

For a data set containing three rows and two columns the degrees of freedom would be two. If the result of a chi-square analysis was 8.1 it can be seen from Table 6.12 that this value exceeds the 2.5% level of significance for two degrees of freedom, but it does not exceed the 1% level. The relationship that produced this result would be significant, but not highly significant. It should be noted that the chi-square test is not able to identify whether one factor was present before another, nor is it able to offer any causal explanation as to why a relationship is present (Babbie, 1990).

6.10.4 – Time series analysis and forecasting

A primary use of time series analysis is to forecast future values and it is important to be able to forecast the future with some degree of accuracy. Time series data are a set of variables over several periods. It is desirable to use time series data to forecast future values from past observations. One approach is to estimate the value of the next time period based on previous time period observations. It is often not appropriate to only undertake this linear extrapolation, which only uses the most recent observations for forecasting the next observation (Webster, 1992), as the time series may contains too many random fluctuations or short-term seasonal changes, the trend may be somewhat obscured and difficult to observe. It is often possible to eliminate many of these confounding factors by averaging the data over several time periods (DeLurgio, 1998). Therefore to compliment this simple extrapolation method, smoothing techniques have been identified to forecast the future of the U.K. conference sector. These smoothing techniques are exponential smoothing and Holt's linear trend.

6.10.4.1 – Exponentially smoothed averages

Exponential smoothing provides an effective means of prediction, whilst also smoothing out fluctuations in time series data. "Exponential smoothing is a forecasting tool in which the forecast is based on a weighted average of current and past values" (Webster, 1992 p.823), along with a smoothing constant. In doing so, historical observations are 'smoothed' to eliminate randomness (Makridakis & Wheelwright, 1989). The smoothing constant determines how fast the weights of the series decays. The values may be chosen either subjectively or objectively. Values of a smoothing constant near one put almost all weight on the most recent observations. Values of a smoothing constant near zero allow the distant past observations to have a large influence. An exponentially smoothed moving average utilise all observation rather than limited to a subset. Exponential smoothing can either be first or second order, depending on whether the data shows no trend but moves around an average value over time. In this instance first order smoothing should be used. However, where the time series data exhibits a downward or upward trend second order exponential smoothing is required (Makridakis & Wheelwright, 1989).

6.10.4.2 – Second order exponential smoothing

Referred to as second order or double exponential smoothing, this method computes a trend through the data using a weighting function that places the greatest emphasis on the most recent time periods (Frechtling, 2001). In the first-order exponential smoothing procedure, the forecast values always lag behind the actual values by one or several periods. A more efficient adjustment can be made of the forecast to the actual values pattern by using double exponential smoothing, as it is based on a linear trend and consists of two equations. The first equation corresponds to that of first-order exponential smoothing, while in the second equation, the values calculated in the first equation are used as initial values and are smoothed again (Makridakis & Wheelwright, 1989). A variation on double exponential smoothing method is that of Holt's Linear Trend.

6.10.4.3 – Holt's linear exponential smoothing

Holt's linear exponential smoothing also computes an evolving trend equation through the data using a special weighting function that also places the greatest emphasis on the most recent time periods. Instead of the global trend equation of the least squares trend algorithm, this technique uses a local trend equation. The trend equation is modified from period to period and the forecasting equation changes from period to period. Holt's linear trend also utilises a smoothing constant, as the double exponential smoothing procedure does (Makridakis & Wheelwright, 1989). There are two stages to the calculation of Holt's linear trend, as shown in Figure 6.19.

From Figure 6.19 it can be seen that the smoothing constant (α) is replaced by an independent smoothing constant (β). The values for both α and β can vary between 0 and 1 and during the calculation of T_t these value are varied in order to establish the combination of the two values that generates the lowest mean absolute percentage error (MAPE). The advantages of using a double exponential smoothing method, such as Holt's linear method, is that it is relatively simple, it captures linear trends both up and down, whilst forecasting several periods ahead. Its disadvantages are that it cannot predict non-linear trends or stepped data well and fails to deal with seasonality. It does not offer any causal explanation, but this is common to all time series methods.

(1) (Double Exponential Smoothing)

$$F_{t+1} = \alpha A_t + (1 - \alpha)\, F_t$$

Where

F_{t+1} = forecast for the next time period

α = smoothing constant between 0 and 1

A_t = actual, observed value for current time period

F_t = the forecast previously made for the period

(2) (Holt's Linear Exponential Smoothing)

$$T_t = \beta(S_t - S_{t-1}) + (1 - \beta)T_{t-1}$$

Where

T_t = smoothed trend in data series

β = smoothing coefficient, analogous to α

S_t = equivalent of single exponential smoothed value

Figure 6.19 – The calculation of holt's linear exponential smoothing

Source: Makridakis & Wheelwright, 1989, p.77

6.11 – Summary of Chapter Six

This chapter has detailed the research approach adopted by this thesis, which has been sub-divided into four distinct stages, that of;

1. The essential first steps
2. Research design
3. Data collection
4. Analysis and interpretation

The essential first steps involved an extensive literature review from multiple sources including textbooks, journals and internet searches, which forms chapters one through to Chapter Five of this thesis. Additionally, from this literature review the specific research problem along with the research objectives and hypotheses were identified.

In order to gather empirical data in response to these objectives and hypotheses, a survey based research method has been adopted through the use of a postal questionnaire. This method is favoured over face-to-face interviews and telephone surveys with the aim of surveying a wider U.K. population as well as due to financial and time constraints. The questionnaire is composed of closed-questions which enables the respondent to complete the questionnaire in an acceptable timeframe. Closed questions also facilitate the quantitative methodology which is employed for the analysis of data, along with a descriptive, explanatory, comparative and predictive research approach to the presentation of results.

The questionnaire was subjected to two pre-test interviews with a management employee of the Suncliffe Hotel. Additionally, the questionnaire was piloted three times in order to obtain feedback on its validity and reliability. Concerns over the length of the questionnaire, the gathering of historical data and specifically regarding the inclusion of financially related questions were expressed through the pre-test interviews. These questions had a low response rate in the piloted surveys. Although concerns were expressed, this research seeks to establish data concerning the U.K. conference sector, in which its financial performance is an integral part, along with historical data. As such this research accepts the concerns expressed regarding financially related questions, but has retained such questions in a bid to obtain the maximum level of data concerning the entire U.K. conference sector. It is also accepted that if insufficient financial data is obtained, such data can be omitted from the analysis at a later date.

The survey population was identified from a number of wide ranging sources. These sources were combined and once duplicates were removed and correct venue classifications assigned a research population totalled 3,000 venues across the U.K was established.

The main body of questionnaires were sent between June and August 2001. During this time a number of reminders were sent to non-responding venues and telephone calls were also made to encourage the return of completed questionnaires. After the three month period assigned for the collection of empirical data, from a survey population of 3,000, 438 replies were deemed valid, giving an overall response rate of 14.6%. This can be broken down between the four classifications with purpose-built conference venue survey population being 300, of which 53 responded, giving a response rate of 17.6%. This compares to hotels, which had a survey population of 2,000, with 286 respondents giving a response rate of 14.3%. The visitor attraction survey population was 552 of which 75 responded, giving a response rate of 13.6% and the educational establishment's survey population numbered 148 of which 24 responded, giving a response rate of 16.2%.

The data obtained from these questionnaires will be presented in the next chapter using a number of statistical techniques, including descriptive statistics, cross tabulation, chi-squared analysis and forecasting through the use of exponential smoothing techniques.

CHAPTER SEVEN – RESEARCH ANALYSIS

7.1 – Introduction

The following analysis utilises the empirical data collected in order to meet the research aim, objectives and either prove or disprove the research hypotheses. Both the research objectives and hypotheses are re-stated here for clarity. The research objectives are;

1. To outline the characteristics of the different classifications of the U.K. conference sector. Additionally, this research will analyse if the existing classifications are the most appropriate to use in segmenting conference supply.
2. To identify which classification of conference venue development accounted for the most significant growth in the U.K. conference sector.
3. To outline reasons for the development of each venue classification and to explore the mechanisms used to diversify into the conference market.
4. To forecast the future development for each of the venue classifications identified.
5. To test if the lifecycle model can be used to explain the development of the U.K. conference sector.

These objectives will answer the following research hypotheses:

- Current classifications of conference venues are an appropriate way to segment venue supply (Objective One)
- Purpose-built venues were responsible for the most significant growth in the U.K. conference sector (Objective Two)
- Changes to venue facilities were economically driven (Objective Three)
- Future composition of the U.K. conference sector will continue to be dominated by hotel conference venues (Objective Four).
- The lifecycle model can be used to explain the development of the conference sector (Objective Five).

In order to establish whether or not actual respondents were in a decision-making position, with reference to completing the questionnaire, the respondent's job title was identified.

7.2 – Respondents job title

Table 7.1 details the respondent's job title for purpose-built venues.

Table 7.1 – Respondents job title;
purpose-built conference venues

Responsibility	Number of respondents citing responsibility (%)
Conference Manager	13 (24.5)
General Manager	13 (24.5)
Director	4 (7.6)
Other	23 (43.4)
Total (n =)	53 (100)

In Appendix D, Tables 7.2 to 7.4, (refer to page 461) detail the respondent's job title for hotels, educational establishments and visitor attractions. The findings show that the Conference Manager, General Manager and Director accounted for more than half of all respondents. 'Other' job titles included Conference and Events Supervisors, Events and Sales Managers, Conference Coordinator, Commercial Manager and Front of House Manager. It can be concluded that the majority of respondents were in senior positions regarding the conference facilities and that valid responses would be expected.

7.3 – Hypothesis One; Current classifications of conference venues are an appropriate way to segment venue supply

Hypothesis One states that the current classifications of conference venues are an appropriate way to segment venue supply. Based on the literature review undertaken in Chapter Four which reviewed six typologies published since 1992 (also refer to Appendix B, Table 4.1 (refer to page 412), this review identified that some aspects of the currently used typologies are inappropriate, as they are often confusing with no clear differentiation between some of the terms used and unnecessarily protracted through the use of sub divisions. In response to these criticisms and the Hypothesis One, this research identifies and forwards four venue classifications that more accurately reflect the U.K. conference sector at the start of the 21st century. These classifications are based solely upon the nature of the venue and are;

1. Purpose-built conference venues.
2. Hotels with conference venues.
3. Educational establishments with conference venues.
4. Visitor attractions with conference venues.

Respondents to the empirical survey identified which venue classification they represented and in doing so it was possible to identify the characteristics for each of these four venue categories in order to achieve the first of the research objectives.

7.3.1 – Conference venue classifications

Although the discussion shall focus primarily on the four classifications identified, each of the four venue classifications contained a number of sub-divisions. In Appendix D, Figures 7.1 to 7.4, (refer to pages 462 and 463), show the distribution of conference venue classifications across the U.K. conference sector.

7.3.1.1 – Purpose-built conference venues sub-divided

Although there is diversity within the responses obtained, Figure 7.1 in Appendix D (refer to page 462) shows purpose-built conference venues are largely comprised of multi-purpose venues, including civic and community halls, with 22 (41.5%) responses. Section 4.2.2 highlighted that an increasing number of civic venues were offering conference facilities for commercial gain and these results show that they constitute a large proportion of purpose-built venues within the U.K. conference sector. This is followed by purpose-built conference centres (i.e. those specifically built to host conferences), which are responsible for 16 (31.1%) responses. Residential conference centres accounted for 15 (28.3%) of respondents from purpose-built venues. These residential centres provide dedicated conference facilities only for conference delegates and accommodation that satisfies the demands of such delegates. "They accept no business other than conferences and meetings and as such are an excellent choice for small to medium sized corporate and association meetings" (McCabe, 2003 p.53). They are built to a specific designed to cater for conference delegates, focusing on enhancing the success of the meeting (McCabe, ibid). This venue classification is growing in popularity (Lawson, 2000) and this research identifies that over a quarter of respondents from purpose-built venues are residential centres, thus this research supports the view of Lawson (ibid). Of the 53 responding purpose-built venues, one (1.9%) venue stated they were based at an airport and one venue stated they were a beach conference venue. Additionally, although the questionnaire provided the opportunity for respondents to differentiate themselves on the basis of urban or rural, few respondents stated their geographical location, with three (5.7%) stating they were urban based and only one (1.9%) stating they were rural.

7.3.1.2 – Hotel conference venues sub-divided

The results in Appendix D, Figure 7.2, (refer to page 461) show that within the hotel classification no single venue classification dominates. The survey responses show that there is almost an equal split between chain-owned hotels, (146 respondents or 51%) and independent hotels (140 respondents or 49%). Chain owned hotels which offer conference packages create a competitive advantage by offering a standardised hotel / conference product. This can be promoted globally creating a strong brand identity that achieves more than just a price advantage (Morgan, 1994). However, within this survey, independent hotels were strongly represented within the hotel venue classification, suggesting that chain owned hotels do not dominate this sector. Of the 286 responding hotels, ten (3.5%) stated they were based at an airport, a further 12 (4.2%) were beach hotels. A total of 85 (29.7%) of responding hotels stated they considered themselves as traditional, whereas 66 (23.1%) classified themselves as modern. Only half of respondents provided their geographical location, with 79 (27.6%) hotels stating they considered themselves a rural hotel and 74 (25.9%) as urban.

7.3.1.3 – Educational establishment conference venues sub-divided

Universities dominate the educational establishment classification, with 13 (54.2%) responses. An additional two (8.3%) universities stated they were purpose-built management training centres (MTC) located on campus. Colleges and further educational establishments are the second most common venue classification within this venue category, accounting for five (20.8%) responses, while one (4.2%) venues stated they were purpose-built MTC located on campus. In Section 4.2.3 it was identified that only Davidson & Cope (2003) had included management training venues in their typology. Prior to 2003 none of the reviewed typologies listed such a venue classification. It can therefore be seen that the introduction of management training venues is a recent phenomena and this is reflected with the lowest response rate being attributed to management training centres not located on campus, accounting for only three (12.5%) venues. Additionally, only one (4.2%) venue stated it was urban based and two (8.3%) educational establishments stated they were rural.

7.3.1.4 – Visitor attraction conference venues sub-divided

The literature review in Section 4.2.4 identifies that visitor attractions offer the greatest diversity within venue classifications (Venuefinder, online 2004). This research supports the view of Rogers (1998), with responses from eight different types of visitor attractions, which is the largest range of venue categories within this research. Appendix D, Figure 7.4, (refer to page 463) shows that ‘sports and leisure’ venues, including large sports stadia, golf courses and horse racing tracks were the most common, being responsible for 18 (24%) responses. Castles, country houses and historic buildings without accommodation closely followed this, accounting for 16 (21.3%) venues. Three separate categories each accounted for 11 (14.7%) venues, that of castles, country houses and historic buildings with accommodation, as well as museum and gallery along with ‘other venues’. The term ‘Other venues,’ includes a diverse range of visitor attractions such as a vineyard, a media centre and an arts centre. Theatres and concert halls each received five (6.7%) responses. Finally, two (2.7%) boat and train venues responded, along with one (1.3%) fun park. Of the four conference venue classifications, these results show that visitor attractions offer the conference organiser the greatest level of choice and variety of venues. Additionally, as with the other venue classifications, few respondents stated their geographical location, with 12 (16%) stating they were urban based attractions and 13 (17.3%) stating they were rural based.

Overall, this research identifies that each of these four venue classifications can be sub-divided into a number of specific venues types. There are two classifications that are dominated by a single venue classification, namely universities in the educational venues and multi-purpose venues in the purpose-built venue category. Hotels have approximately equal representation from independently owned and chain-owned hotels. The greatest level of diversity exists within visitor attractions, with responses from seven differing venue classifications. Overall this research highlights the diversity of venue classifications that exists within the U.K. conference sector (Rogers, 1998), which supports the literature review in Section 4.2.4.

In summary Figure 7.5 shows that a single typology for the U.K. conference sector can be split into four venue classifications. Each classification can be split by its constituent venue types.

One Typology	Classifications	Venue Types
One U.K. Conference Typology	Purpose-built	Purpose-built Multi-purpose Residential
	Hotels	Chain owned Independently owned
	Educational Establishments	University College Management Training Centre
	Visitor Attractions	Castle, Country House with and without accommodation Museum / Gallery Fun Park Boat / Train Sports and Leisure Centre Theatre / Concerts

Figure 7.5 – A single venue typology, four venue classifications with their respective venue types

7.3.2 – Ownership of conference venues

This research shows that the ownership of conference facilities across the entire U.K. conference sector is dominated by private ownership, with few venues being owned by charities or jointly owned. Figure 7.6 shows the distribution of ownership across the four venue classifications.

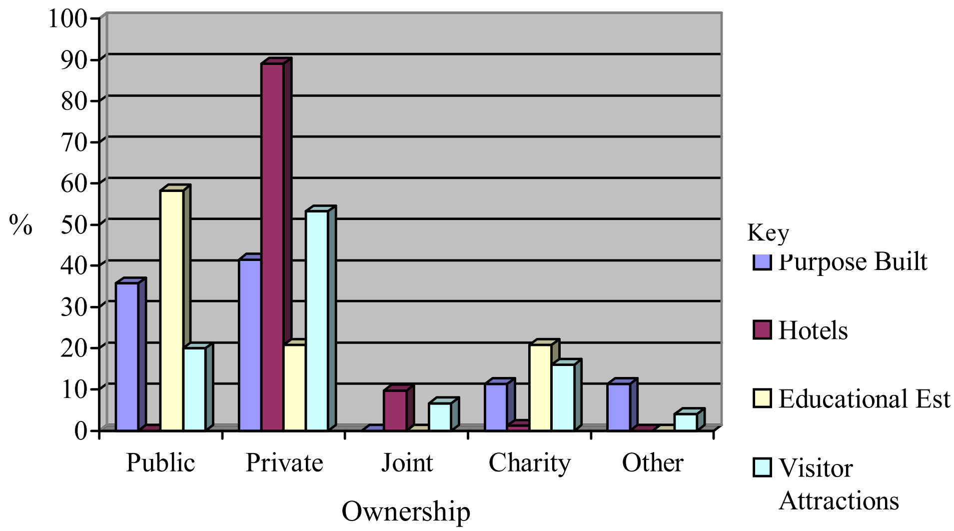


Figure 7.6 – Venue ownership by venue classification
(Purpose-built N=53; Hotels N=257; Educational Establishments N=24; Visitor Attractions N=75)

For purpose-built venues the findings identify that private ownership is greater than public, (22 venues or 41.6% are privately owned, compared to 19 venues or 35.8% that are publicly owned). These findings support those of Mills (1991) and Davidson & Cope (2003) who both identified that the majority of such venues are owned by local authorities (refer to Section 4.4). There were also six (11.3%) purpose-built venues that were owned by charities and six (11.3%) stated 'Other' types of ownership, although none actually stated who owned them. Hotels are also dominated by private ownership, with 229 (89.1%) respondents. Moreover, 25 (9.7%) are jointly owned, three (1.2%) stated 'Other' forms of ownership and none were solely publicly owned. The majority of educational establishment venues are publicly owned, with 14 (58.3%) responding. A further five (20.8%) venues are privately owned management-training venues and five (20.8%) are owned by charities. The majority of visitor attractions (40 venues or 53.3%) are privately owned, with 15 (20%) being publicly owned and 30 (7.3%) are jointly owned. Moreover, 12 venues (16%) are owned by charities, such as the National Trust or English Heritage, while three (4%) stated their ownership as 'Other', although all failed to declare their ownership.

This research identifies distinct ownership characteristics for each venue classification. The findings show that private and public ownership are similar within purpose-built venues, whereas hotels and visitor attractions are dominated by the private sector. Educational establishments are characterised by public ownership and visitor attractions have the highest ownership by charities when compared to all other venue classifications.

7.3.3 – The size of conference facilities for each venue classification

Tables 7.5, details the size and capacity of purpose-built conference venues.

Table 7.5 – The size and capacity of purpose-built conference venues

	Mean	Mode	Median	Min.	Max.	Standard Deviation	Count N =
Theatre style, capacity of largest meeting room m^2	690.9	465	389.8	65	5000	138.77	44
Conference venue maximum capacity of delegates (seated)	720.3	1500	340	60	4200	904.77	50
Conference venue maximum capacity of delegates (not seated)	964.9	100	450	90	5250	1217.67	39
Number of additional boardrooms	8.7	2	4	0	135	20.03	44
Number of additional classrooms	4.4	0	0	0	51	9.26	37
Banqueting capacity of largest room m^2	520.0	100	305	20	2787	920.47	39
Banqueting maximum capacity of delegates seated	368.3	400	250	60	1500	335.58	45
Banqueting max. capacity of delegates (not seated)	696.6	300	350	100	2500	719.17	27
Total floor space m^2	4748.1	n/a	1500	150	60604	11331.00	27
Accommodation: no. rooms	82.9	29	54	29	249	56.83	15

Appendix D, Tables 7.6 to 7.8, (refer to pages 464 and 465) details the size and capacity of conference venues for hotels, educational establishments and visitor attractions. This question aims to identify which of the four venue classifications offer the largest and smallest conference facilities. When using the average values to identify the characteristics of the venue classifications, Table 7.5 shows that it is purpose-built venues that offer the largest facilities. The capacity of the largest purpose-built meeting room is on average 690.9m^2. Additionally, purpose-built venues can on average seat a maximum of 720.3 delegates, or 964.9 unseated in their conference facilities. Moreover, purpose-built venue banqueting facilities have a maximum capacity of 368.3 seated and 696.6 unseated. Such venues also have an average of 8.7 additional meeting rooms per venue. Overall purpose-built venues have an average total floor space of 4,748.1 m^2.

Foster (1994), Lawson (1996) and Shallcross (1998) identified that the primary differentiating characteristic between this purpose-built venues and the other venue classifications is the extensive space provided to cater for conferences where delegate number may run to several thousands (refer to Section 4.4). This research supports the findings of Foster (1994), Lawson (1996) and Shallcross (1998), in that it remains the case that a differentiating factor between purpose-built venues and the other venue classifications is that of capacity. A purpose-built venue is therefore ideal for those conferences that require both large amounts of floor space and delegate capacity.

The findings in Table 7.6 of Appendix D (refer to page 464) identifies that hotels offer the smallest conference facilities within all four venue classifications. The capacity of their largest meeting room is on average the smallest across all venue classifications at 361.8m^2. Their maximum capacity for conference delegates is also the smallest across the venue classifications with 209.7 seated and 306.8 unseated. The banqueting capacity of the largest room is 312.6m^2, which holds 189.7 seated and 257.2 unseated. Overall hotels have an average total floor space of 581.2m^2, with on average 6.4 meeting rooms. In Section 4.5 it was identified that Greaves (1999) acknowledged many hotels have limited capacities in relation to purpose-built venues and this research supports the work of Greaves (1999). Hotels remain limited with respect to their capacity to hold conferences when compared to purpose-built venues.

The literature review also identifies that a significant characteristic of educational establishments are that they are built with ‘learning spaces’, refer to Section 4.6 Although the findings in Table 7.7 identify that educational establishments have the largest total floor space offered, with an average value of 8,257.7m^2, it is not in terms of theatre style or conference capacity, but this total floor space is divided into classrooms. Indeed this venue classification has approximately twice as many classrooms, 24.1 compared to 12.9 for the other three venue classifications combined. This is intrinsic to an educational establishment, as the literature review identifies and it makes the provision of conferences easier to establish if the room infrastructure is already built. The capacity of their largest meeting room is on average 612.5m^2. Their maximum capacity for conference delegates is 433.7 seated and 529.3 unseated. While the banqueting capacity of the largest room is 713.1m^2, which holds 338.8 seated and 477.1 unseated.

Visitor attractions are characterised by a limited number of large conference facilities. For visitor attractions it can be seen in Appendix D, Table 7.8, (refer to page 465) that the minimum capacity of the attractions largest meeting room is 20m^2, which is a museum. The maximum meeting room is on average 9,008m^2 which is a sports stadium. The standard deviation is therefore large 641.1, indicates large variation from the mean within the results. Thus, care should thus be taken when discussing this venue classification as such large venue capacities experienced at relatively few conference venues may lead to a skew within the average values. A typical visitor attraction will offer medium-sized conference rooms, with the average capacity of its largest meeting room being 641m^2 and can seat on average 531.9 delegates or 700.2 unseated. Its average banqueting capacity is 562.3m^2, seating 363.3 delegates or 633.9 unseated. The venue will also contain 8.4 additional boardrooms. The average total floor space is 1,592.5m^2.

These findings support the literature review of Section 4.2.2 including that of Lawson (2000) who identifies that purpose-built venues are the largest constructions offering a wide variety of room sizes, whereas hotels offer smaller venues sizes. These findings also dispel the perception of many conference organisers that visitor attractions offer only small conference facilities, as identified by Leask & Hood (2000) in Table 4.6. These results differ and positively show that visitor attractions can host medium sized events. It should be noted that due to the diversity of venue classifications within the visitor attraction category, not all visitor attractions have such large conference facilities. There are some extremely large facilities, such as sports stadia, which will skew the results in comparison to very small facilities offered by some museums.

7.3.4– Conference venue accommodation

Accommodation capacity is also an important factor that can be used to construct a typology of conference venues. Although offering the largest conference delegate capacities, the majority of purpose-built conference venues stated they do not offer accommodation. This supports the work of McCabe et al (2000) and Davidson & Cope (2003) who identified that purpose-built venues do not traditionally offer delegates on-site overnight accommodation. However, 17 (32%) residential conference centres offer between 29 to 249 bedrooms, giving an average number of beds per venue of 82. This average is the lowest across all four venue classifications.

The 262 responding hotels offer between six and 910 bedrooms, with an average of 110 bedrooms per venue. Whereas the 23 responding educational establishments offer between 30 and 3,000 bedrooms, giving average of 667 bedrooms per venue. This is the largest average number of bedrooms across the four conference venue classifications and supports the findings of Lawson (2000) who stated that an advantage of undertaking a conference at a university venue is the capacity of the overnight accommodation stock through the use of halls of residence. Educational establishment respondents were thus asked an additional question concerning the type of accommodation used by delegates. Results show that 17 (70.8%) educational establishments use halls of residence, with the remaining seven (29.2%) using either purpose-built residential facilities on campus or adjacent hotels.

Only 16 (21.3%) responding visitor attractions offer accommodation facilities. This ranges between six and 800 bedrooms, giving an average of 104 bedrooms per visitor attraction. Historical buildings and sports stadia were the only visitor attractions to offer accommodation. For those visitor attractions offering accommodation, this should be considered a strength as they are able to offer a complete package, that of a unique conference venue along with accommodation. The fact that only two types of visitor attractions offer accommodation should be seen as a limitation of this venue classification and supports Leask & Hood's (2000) SWOT analysis of visitor attractions, which viewed the lack of on-site accommodation as a weakness (refer to Section 4.7). The discussion continues by focusing on the facilities offered within the overnight accommodation. It is important to identify whether the four classification provide specific facilities to cater for conference delegates.

7.3.5 – Bedroom facilities offered to delegates

The questionnaire asked respondents to specify the facilities provided by overnight accommodation from a list of six facilities, namely telephone, desk, satellite television, email, fax and mini-bar. These facilities were identified from previous questionnaires undertaken including those by the BTA and British Association of Conference Destinations (1999) and the results are shown in Figure 7.7. It should be noted that only 17 purpose-built venues offer accommodation.

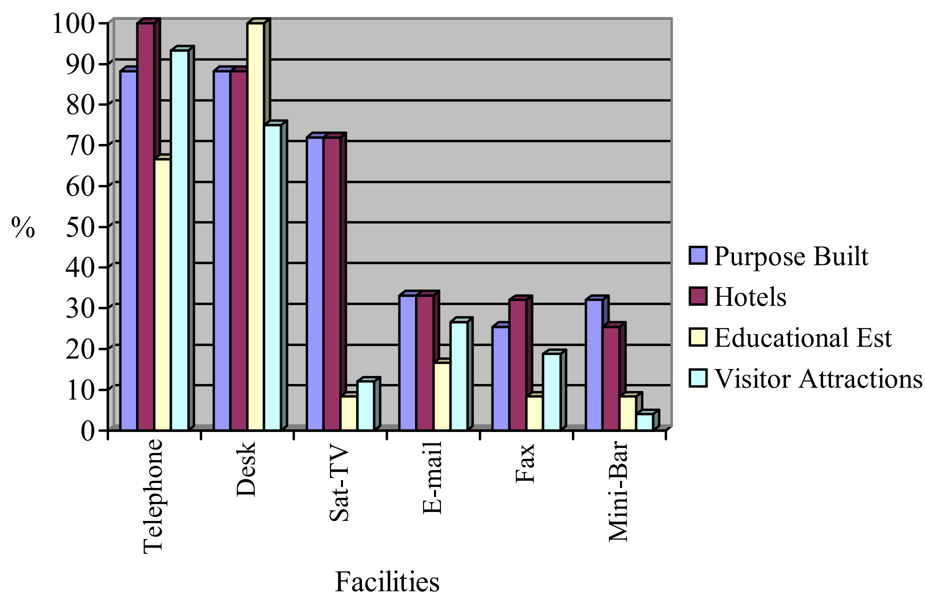


Figure 7.7 – Bedroom facilities offered to delegates
(Purpose-built N=17; Hotels N=286; Educational Establishments N=24;
Visitor Attractions N=13)

All four venue classifications provide the basic furnishings required by a conference delegate. A desk is offered by all responding educational establishments, along with 15 (88.2%) purpose-built venues, 285 (99.6%) hotels and 12 (75%) visitor attractions.

All hotels offered a telephone, while 15 (88.2%) purpose-built venues, 14 (87.5%) visitor attractions and 16 (66.6%) educational establishments offered telephones in their overnight accommodation.

Satellite television and email facilities were offered by nine (52.9%) and eight (47%) purpose-built venues respectively. Only three (17.6%) venues offered fax facilities and one (5.8%) offered a mini bar. With reference to the combination of facilities offered by the purpose-built conference venues, two (13.3%) venues only offered one facility in the bedrooms. Of those responding, nine (60%) venues offered up to three facilities and six (40%) venues offered between four and six facilities, of which one (6.7%) venue offered all six facilities listed.

For hotels, satellite television was offered by 206 (72.0%) venues. There is a significant drop in the number of hotels offering e-mail, mini-bar and fax facilities, which were offered by 95 (33.2%), 92 (32.1%) and 73 (25.5%) hotels respectively. It may not be cost effective to provide such facilities in all hotel rooms but rather a centralised service, for example, at the front-desk of the hotel. Examining the combination of facilities offered, shows that the majority, 159 (55.9%) hotels offer three or less of the listed facilities. Although nearly a quarter (68 hotels or 23.7%) offer five or more facilities, with 21 (7.3%) hotels offered all six. This research shows that hotels in general offer a wide range of accommodation facilities. However, many of these facilities are just as likely to be required by non-delegates, suggesting that many hotels do not cater specifically for the demands of conference delegates.

For educational establishments, four (16.6%) venues offered email facilities. Only two (8.3%) such establishments offered satellite television, a mini bar and fax facilities in overnight rooms. With regards to the combination of facilities offered, eight (33%) respondents stated they offer one of the six facilities. With nine (37.5%) venues offering two and a maximum of four facilities being offered by three (12.5%) establishments. No respondents stated they offered all six of the listed facilities. The literature review in Section 4.6 identified that educational establishment's offer the most basic accommodation to delegates (Paine, 1993; Seeking, 1996). This research supports the view of Paine (1993) and Seeking (1996) by identifying that educational establishments offered the least facilities in their overnight accommodation, when compared to the other three types of conference venues classifications.

For the 16 responding visitor attractions, email services are offered by four (25%) venues, whilst fax facilities are offered by three (18.7%), satellite television by nine (56.2%) and mini bars by three (18.7%) venues. When examining the combination of services offered, it can be seen that two (16.7%) venues offered one facility, with a third of all visitor attractions offering two facilities and no venues offered all six. This research suggests that visitor attractions have a limited range of accommodation facilities for conference delegates.

A test of statistical significance using chi-square analysis was undertaken. As discussed in Section 6.10.3, a test of statistical significance identifies whether a relationship between two variables arises by chance (Sapsford, 1999). A total of three bedroom facilities, namely a telephone, a desk and satellite television which are significant to the 0.001 level. Therefore it is possible to state with 99.999% confidence level that telephones, desks and satellite television are strong associated with hotels and educational establishment conference venues. Mini bars are also statistically significant to the 0.01 level, although not as strongly significant as the other three factors. Therefore this research can be 99.99% confident of stating that a relationship exists between the provision of mini bars and their provision within hotel accommodation. Based on the above discussion of the research findings and significance levels identified by using chi squared test, it can be seen that distinct venue classifications are characterised by varying levels of provision of accommodation facilities, this is summarised in Table 7.9.

The results suggest that hotels have the highest levels of provision for bedroom facilities, whilst educational establishments offer the lowest level of provision. Section 5.6 identified that large scale investment has occurred in educational establishment conference products, however, these results suggest that the level of provision for overnight accommodation offered by educational establishments remains below that of the other venue classifications.

Table 7.9 – Highest and lowest level of provision of bedroom facilities

Bedroom Facility	Highest Level of Provision (% offering facility)	Lowest Level of Provision (% offering facility)
Telephone	Hotels (100)	Educational (66.6)
Desk	Educational (100)	Visitor attractions (75)
Satellite TV	Hotels (72)	Educational (8.3)
E-mail	Purpose B. (47)	Educational (16.6)
Fax	Hotels (25.5)	Educational (8.3)
Mini-bar	Hotels (32.1)	Educational (8.3)

Section 5.3 also identified that service quality is considered within the site selection process for conference organisers and delegates and that accommodation facilities is a factor within this site selection process (Crouch & Ritchie, 1998 cited in Crouch & Louviere, 2004). Thus, when the level of provision for accommodation facilities is used within a service quality based selection process, educational establishments may not compare well to hotels based on this factor alone. If the conference organiser aims to offer a wide range of accommodation facilities to conference delegates, hotels may be preferred over educational establishments. One method of comparing the level of service quality within the facilities offered by hotels is that of a rating or accreditation scheme (refer to Section 5.4), with the literature identifying that rating are increasingly influencing the venue selection process (E.T.C, 2000).

7.3.6 – Hotel accreditation

Only respondents from the hotels were questioned regarding their accreditation rating and the organisation that offered this rating. Research by Callan (1995) identified that approximately two-thirds of three, four and five star hotel guests utilise a grading scheme in their accommodation selection process. Thus, the need for a hotel to possess a grading or rating is essential. This research identifies that of the 286 respondents, 257 (89.9%) hotels had some form of hotel rating. Only 29 (10.1%) responding hotels did not have any accreditation. Based upon the previous research, such as Callan (1995), the questionnaire suggested two organisations that traditionally grade hotel establishments, the Automobile Association (AA) and the Royal Automobile Club (RAC). The questionnaire also permitted respondents to declare any other rating that has been awarded to the establishment, such as that offered by Tourist Boards (i.e. English, Welsh or Scottish), Michelin and the Hospitality Assured Meetings accreditation. The results can be seen in Table 7.10.

Table 7.10 – Hotel accreditation

Accreditation	No rating	2 star	3 star	4 star	5 star	Total
AA	94	10	119	54	9	286
RAC	184	7	60	27	8	286
Other	197	7	37	42	3	286

N = 286

This research supports the findings of Callan (1995) by identifying that the grading schemes of the AA and RAC are the mostly widely used hotel accreditation schemes within the U.K. With regards to AA accreditation, 192 (67.1%) hotels stated they possessed an AA awarded accreditation. This compares to 102 (32.2%) hotels possessing a RAC accreditation and 89 (31.1%) hotels with another form of ratings. The minimum accreditation obtained by any of the hotels from the AA, RAC or other organisation was two star and a maximum of five star. For the AA the modal value is three star (119 hotels or 61.9%), the mean is 3.3 and the standard deviation is 0.64 indicating that the distribution of values is close to the mean, therefore the mean can be viewed as representative of the sample. The modal value is also three star (60 hotels or 58.8%) for RAC accredited hotels, with the mean also being 3.3, but the standard deviation is 0.72. For ratings given by other organisations, the modal value is higher at four star (42 hotels or 47.1%), although the mean is similar to that of the RAC and AA at 3.4 and the standard deviation is 0.72. In all cases five star hotels were the least represented, with only nine (4.7%) establishments receiving an AA five star grading, eight (7.8%) receiving a RAC five star award and three (3.3%) being awarded five star by other organisations. This reflects the relatively low numbers of five star hotels within the U.K.

Further statistical analysis was undertaken through cross-tabulation and chi-square analysis with respect to the ownership of the hotel and hotel accreditation. In order to test the null hypothesis that no relationship exists between the ownership of the hotel and the accreditation awarded to the hotel. Based on the critical values for chi-square, as seen in Table 6.12, these factors are significant to the 0.005 level. The null hypothesis can therefore be rejected and it can be stated that there is a relationship between the ownership of the hotel and the accreditation awarded. In order to identify this relationship the actual and expected values as calculated as a part of the chi-square analysis process are examined. The greater the difference between actual and expected values indicates that a relationship exists between the variable being examined. The results relating to AA accreditation can be seen in Table 7.11.

Table 7.11 – Ownership of hotel / AA accreditation

		AA Accreditation				
Ownership of hotel		2 star	3 star	4 star	5 star	Total
Chain-owned	Actual	4	46	**37**	**5**	92
	Expected	4.8	57.0	**25.9**	**4.3**	92.0
Independently-owned	Actual	*6*	*73*	17	4	100
	Expected	*5.2*	*62.0*	28.1	4.7	100.0
Total	Actual	10	119	54	9	192
	Expected	10.0	119.0	54.0	9.0	192.0

N = 192

From Table 7.11 chained-owned hotel are more likely to be four star or five star, (**bold** in Table 7.11) whereas independently-owned hotels are more likely to be two star or three star (*italics* in Table 7.11). Undertaking the same cross-tabulation and chi-square analysis to examine the nature of the hotel and the awarded RAC rating shows that these factors are significant to the 0.01 level. The same relationship exists between the nature of the hotel and the RAC rating, as exists for AA ratings as discussed previously.

The same statistical tests for 'Other accreditation' show chi-square significance at the 0.05 level. Again, a relationship exists similar to that discussed earlier, in that chained owned hotels are likely to be awarded a higher rating, while independently owned hotels are characterised by a lower quality rating. Statistical analysis (actual / expected) also suggests that it is more likely that independently owned hotels would possess 'Other accreditation', such as English Tourism. The results highlight that if hotel grading schemes are utilised by conference organisers and delegates in their accommodation selection process, where demand exists for four star or five star accommodation such hotels are more likely to be chain-owned hotels. If lower grade accommodation is required, there is a larger stock of independently owned hotels to choose from within the U.K.

7.3.7 – Facilities featured in a conference venue

Once again, it is important to identify whether all conference venues offer the same standard of conference facilities, or whether one venue classification offers a wider range of facilities. Meeting facilities were identified by Crouch & Ritchie (1998) in Section 5.3 as one of the eight primary selection factors that are utilised within the site selection process. The results of this question are shown in Figure 7.8.

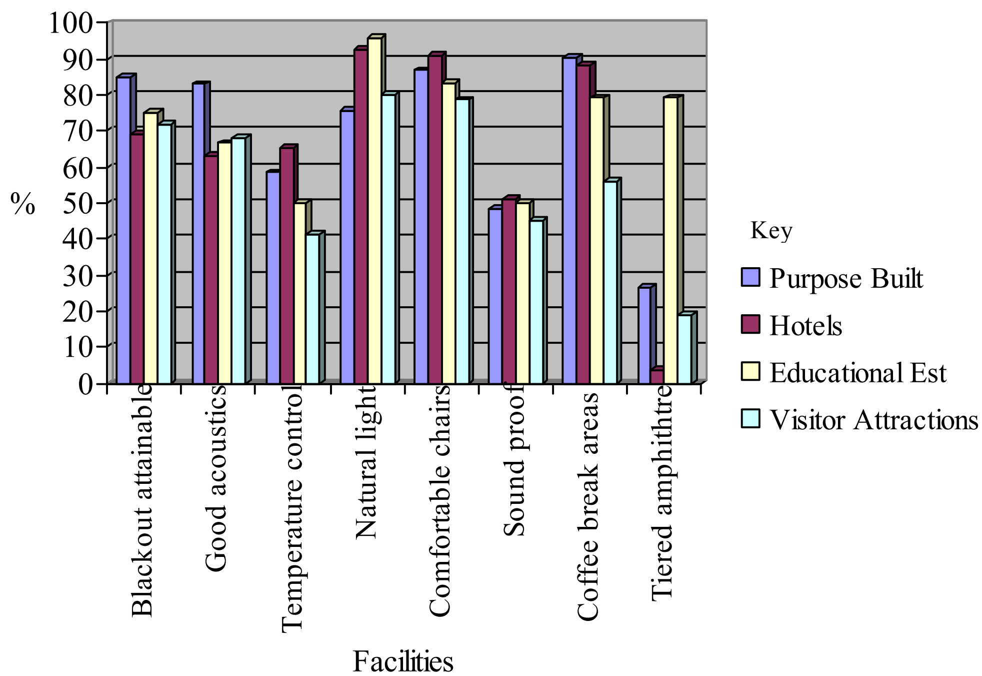


Figure 7.8 – Facilities featured in conference venues

(Purpose-built N=53; Hotels N=286; Educational Establishments N=24; Visitor Attractions N=75)

The findings in Figure 7.8 show that purpose-built conference venues are characterised by two distinct groups of facilities. The first group is that of facilities offered by over 75% of venues and these are the provision of natural lighting (40 venues or 75.5%), quiet environment (41 venues or 77.4%), good acoustics (44 venues or 83%), blackout attainable in conference rooms (45 venues or 84.9%), comfortable chairs (46 venues or 86.4%) and separate coffee-break area (48 venues or 90.6%).

The second group is offered by 60% or less and these are 31 (58.5%) venues offering temperature control, 24 (45.3%) venues offering sound insulation, 19 (35.8%) offering soundproofing and 14 (26.4%) venues offering a tired amphitheatre. Concerning the combination of facilities offered by purpose-built conference venues shows that 13 (24.5%) venues offered five or fewer facilities. While 40 (75.4%) venues provide six or more facilities and 27 (50.9%) venues offered eight or more facilities. Additionally, two (3.7%) venues offered all ten facilities.

As with purpose-built conference venues, hotels are characterised by two distinct groups of facilities offered. Those offered by more than 80% of hotels and those offered by below 70%. For hotels this split is predominantly centred on cost. Those facilities offered by over 80% of responding hotel venues are natural lighting, comfortable chairs, separate coffee area and a quiet environment with 265 (92.6%), 260 (90.9%), 252 (88.1%) and 245 (85.6%) responses respectively. This group of facilities is seen as having a low cost of provision whilst creating amenable conference surroundings. The second group of facilities offered, range from 198 (69.2%) hotels that can attain total blackout to 146 (51%) hotels that have soundproofing. This range includes 190 (66.4%) hotels that have air conditioning and 181 (63.2%) with good acoustics. A further 11 (3.8%) hotels offer a tiered amphitheatre. This second group has a higher cost of provision than the first group and hence their provision may be financially constrained. Concerning the total number of facilities offered by hotels, 74 (25.8%) venues offer five facilities or less, with 151 (52.7%) hotels offering seven of the listed facilities or less. All ten facilities were offered by 52 (18.5%) responding hotels.

There are also two distinct groups of facilities offered by educational establishments. Facilities offered by over 75% of venues and those offered by below 75% of such venues. Many of the 11 facilities examined have been introduced by educational establishments prior to the introduction of conferences as part of creating ‘learning spaces’. Educational establishments “are built with ‘learning spaces’ – auditoria, lecture theatres and classrooms – which are highly suited to the meetings market" (Davidson & Cope, 2003, p.99). Section 5.6 suggests that although accommodation provided by educational establishments is often of a basic standard, the lecturing conditions mirror that of purpose-built conference facilities, i.e. a tiered amphitheatre, total blackout is attainable and natural lighting are all required by conference delegates and are provided by educational establishments. They are more comprehensive and better equipped with the latest technology than many hotels or visitor attractions can offer.

Those facilities offered by over 75% of educational establishments are natural lighting, offered by 23 (95.83%) venues, 22 (91.66%) venues offer a quiet environment, 20 (83.33%) offer comfortable chairs, a separate coffee break area is offered by 19 (79.16%) establishments, a tiered amphitheatre is also offered by 19 (79.16%) venues and blackout attainable within the conference rooms by 18 (75%) establishments. Those facilities supplied by less that 75% of educational establishments are good acoustics, accounting for 16 (66.66%) venues, as well as soundproofing, temperature control and air conditioning, each receiving 12 (50%) responses. These results are in agreement with Lawson (2000), who suggests that new lecturing facilities built at educational establishments often have good acoustics, soundproofing, temperature control and air conditioning built into the new facilities. With regards to the combination of facilities offered, 14 (58.4%) respondents stated they supplied up to seven of the listed facilities, with six (25%) respondents offering seven of the listed facilities. A fifth of respondents offered eight facilities and three establishments (12.5%) offer all ten facilities.

This research shows that educational establishments are ideal for holding conferences and business meetings as they predominantly have high quality lecturing facilities. As Section 4.6 states, academic venues are becoming more and more desirable (Walk den, cited in Doyle, 2001) and are "an increasingly feasible choice" (Creevy, 2002 p.43). Educational establishments are usually equipped with up-to-date equipment and some of the best lecture rooms (Seekings, 1989) and have support teams available for the technical equipment (Doyle, 2001).

Visitor attractions also have two distinct groups of facilities. Those facilities offered by less than 39% of venue and those offered by more than 68% of venues. The facilities in the latter group are natural lighting, coffee break areas, comfortable chairs, blackout being attainable, quiet environment and good acoustics, with 59 (78.7%), 58 (77.3%), 57 (76%), 54 (72%), 53 (70.7%) and 51 (68%) respectively. Those facilities in the former grouping are soundproofing, temperature control, air conditioning and a having tiered amphitheatre, with 20 (26.7%), 31 (41.3%), 29 (38.7%) and 14 (18.7%) respectively. Although care should be taken due to the low number of responses in this latter grouping, the split between these two groups is unclear and cannot be entirely explained by factors such as cost. However, the two factors with the highest levels of provision are those that can be easily obtained at a low cost, i.e. natural lighting and comfortable chairs. With regards to the combination of facilities offered, 40 (53.3%) respondents stated they supplied up to six or fewer of the listed facilities. Just over a fifth (21.3%) of respondents offer nine facilities and three (4%) venues offer all ten.

For three factors the relationship between the venue classification and the facilities offer are statistically significant to the 0.001 level, that is a relationship exists between the venue classification and the likelihood of providing the facility, these are air conditioning, natural light and tiered amphitheatres. A further two factors are statistically significant to the 0.005 level, that of temperature control and comfortable chairs. One factor is statistically significant to the 0.01 level, that of having a quiet environment. A further two factors are statistically significant to the 0.1 level, these are possessing good acoustics and the availability of having a separate coffee break areas. Finally, two factors show no statistical relationship between the nature of the venue and facilities featured in conference venues. These are soundproofing and blackout attainable, thus it is likely to find such factors in any venue classification. Based on the above discussion and statistical tests, Table 7.12 shows which of the distinct venue classifications are characterised by high and low levels of provision of conference facilities.

With regards to service quality and particularly the selection of conference venues, Robinson & Callan (2003) identified that meeting room tangibles, including the provision of air conditioning, comfortable seating, complete blackout attainable, sound insulation, good acoustics and a tiered amphitheatre, were together ranked as the sixth most important set of attributes in the decision making process of U.K. delegates.

Table 7.12 – Highest and lowest level of provision of conference facilities

Conference Facility	Highest Level of Provision (% offering facility)	Lowest Level of Provision (% offering facility)
Blackout attainable	Purpose-built (84.9)	Hotels (69.2)
Good acoustics	Purpose-built (83)	Hotels (63.2)
Air conditioning	Hotels (66.4)	Visitor Attractions (38.7)
Temperature control	Hotels (65.4)	Visitor Attractions (41.3)
Natural lighting	Educational (95.8)	Purpose-built (75.5)
Comfortable chairs	Hotels (90.9)	Visitor Attractions (78.7)
Sound proofing	Hotels (51)	Visitor Attractions (45.3)
Coffee break area	Purpose-built (90.6)	Visitor Attractions (56)
Quiet environment	Educational (91.7)	Visitor Attractions (70.7)
Tiered amphitheatre	Educational (91.7)	Hotels (3.8)

However, grouping these attributes hides the individual rankings, which can be seen in Table 7.13, which shows that comfortable chairs viewed as important by 97.2% of respondents, where as a theatre-style slope (referred to as an amphitheatre in this research) was viewed as important by less than a half of respondents (49.2%) (Robinson & Callan, 2003b).

Table 7.13 – Meeting room tangibles ranked as important

Meeting Room Tangibles	(%)
Comfortable seating	97.2
Good acoustics	89.3
Good sound insulation	86.7
Natural daylight	81.6
Air conditioning	80.0
Complete blackout	65.7
Theatre style slope	49.2

(Robinson & Callan, 2003b p261; n=547)

In light of these findings from Robinson & Callan (2003) who identified that tangibles are demanded by delegates, the finding of this research identify that certain venues types are associated with offering specific conference venue tangibles. This research supports the view forwarded in Section 4.4, that purpose-built venues offer the greatest range of conference facilities. They are designed with the conference organiser in mind (Foster 1994; Lawson, 1996; Shallcross 1998; Rogers, 1998) with over 50% (27 venues) stating they offer seven or more of the conference facilities listed in the questionnaire. Where good acoustics, the ability to attain blackout within the conference room and also the availability of a separate coffee areas is demanded by the conference delegates, then purpose-built venues may be preferred. However, these findings identify that they often lack the ability to provide natural lighting within the conference venue.

Hotels are characterised by the presence of air conditioning and a temperature-controlled environment. They also provide comfortable chairs and have good sound proofing facilities. However, they lack tiered amphitheatres and good acoustics. Educational establishments are favoured for tiered amphitheatres, a quiet environment and natural lighting within the facilities. As educational establishments are created with many of the facilities demanded by conference delegates, Table 7.12 shows that this venue classification does not appear in the lowest level of provision for any of the ten facilities. This research shows that educational establishments are highly suited to the conference market and do not lack any of the demanded facilities. They may lack in the provision of quality accommodation as demanded by delegates, but their conference facilities are of a high standard.

Whereas visitor attractions are cited as having the lowest level of provision for six of the ten factors, these being air conditioning, temperature control, comfortable chairs, sound proofing, the availability of coffee break areas and quiet environment. This research highlights the infancy of the conference product offered by visitor attractions and thus suggests that venues within this category offer the most basic conference facilities. Extending from the facilities featured in the conference venue are the products offered to the delegates to facilitate a conference itself. These products are now discussed to build a typology across the four conference venues classifications.

7.3.8 – Products offered to delegates

The products offered to delegates are basic equipment, such as white-boards, flip charts and overhead projectors. Other products offered to the delegates consist of audio-visual equipment, technical support, translation services, video-conferencing facilities and a conference bureau. The findings are shown in Figure 7.9.

Purpose-built conference venue classification are characterised by those products offered by over 70% of such venues and those offered by less than 35% of responding venues. All 53 venues offered basic equipment and this reduces to 42 (79.2%) venues offering audio-visual equipment, whilst 38 (71.7%) venues offered technical support. Those products provided by less than 35% of purpose-built venues were video-conferencing (17 venues or 32%), the provision of a translation service, (11 venues or 20.8%) and a conference bureau service (eight venues or 15.1%). Nevertheless, such products as translation services and video-conferencing facilities can be hired in whenever required.

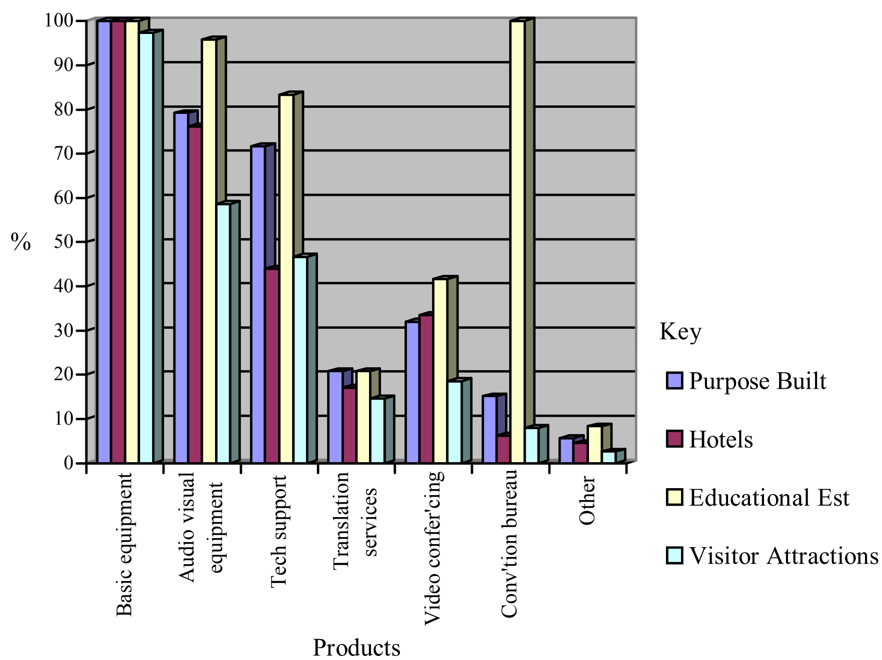


Figure 7.9 – Products offered to delegates
(Purpose-built N=53; Hotels N=286; Educational Establishments N=24;
Visitor Attractions N=75)

When examining the combination of products offered, just over half of the venues, (27 venues or 50.9%) offered three or fewer products. Whereas, 22 (41.5%) venues offered four or more, while six (11.3%) venues offered six or seven products, one (1.88%) venue offered all seven listed products. On average, purpose-built venues offer three of the listed products to their conference delegates.

Cost appears to play a significant part in product provision for hotels. Low cost, easily accessible products such as basic equipment were offer by all 286 hotels. The provision of audio-visual equipment, which is more expensive than the basic equipment, but is still affordable by the majority of hotels, also matches the levels of provision exhibited by purpose-built venues. Audio-visual equipment was referred to by 218 (76.2%) venues. Technical support is the third most popular product offered, accounting for 126 (44%) venues, however, this is lower than the findings for purpose-built venues. Those products that require higher levels of expenditure, such as video-conferencing and translation services, were offered by relatively few hotels, 96 (33.5%) and 49 (17.1%) respectively. Section 5.6.2 states that with regards to technology, most hotels outsource the facility so that they do not have to maintain equipment (Chetwynd, 2001). Costly equipment such as video-conferencing facilities are often hired in, or may be owned by a group of hotels that share the facilities, this is due to the equipment only being required by a minority of (often larger) conferences (Chetwynd, ibid).

When examining the number of products offered by hotels, it can be seen that over 203 (70.9%) hotels offered a combination of three products or less, 57 (19.9%) hotels only offered one product to conference delegates. Moreover, 85 (29.7%) hotels offered four or more products. Only 14 (4.8%) hotels offered six or more products. This shows that on average a hotel will offer fewer products to the conference delegate compared to purpose-built venues.

All 24 educational establishments offered a conference bureau. As stated in Section 5.8, educational establishments such as Oxford University have their own conference bureau and they recognise the importance of using a conference bureau as an important marketing tool. No other venue classification obtained 100% for this facility. Once again, many of the products offered to the delegates are already present at the educational establishments. Low financial expenditure for basic equipment resulted in these products being offer by all educational establishments, as was the case for both purpose-built and hotels. Audio-visual equipment is already available within educational establishments as part of the 'learning space' and was referred to by 23 (95.83%) respondents. Technical support is offered by 20 (83.33%) of the 24 educational establishments, once again technical support is readily available at educational establishments due to its use within academia. The level of provision of audio-visual and technical support is higher than the previous two sectors discussed.

There is a marked decrease in the results when referring to products that may not be used within the 'learning space' on a regular basis. For example, video-conferencing and translation services were offered by relatively few educational establishments, ten (41.6%) and five (20.8%) respectively. Interestingly, the percentages represented for both categories are marginally higher than the hotel facilities. This suggests that educational establishments provided a larger variety of products and facilities in comparison to hotel venues. There may be a low demand for video-conferencing facilities and translation services, therefore educational establishments do not feel it is financially viable to provide such facilities. When examining the combination of products offered by educational establishments, it can be seen that 20 (83.3%) venues offer three product or more, with four (16.6%) offering five or more products. Interestingly four (16.6%) venues offered two or fewer products to conference delegates. This research shows that educational establishments offer the greatest number of products to delegates in comparison to the three other conference venue classifications.

Low cost basic equipment was offered by 73 (97.3%) visitor attractions. The two attractions that did not offer such basic products did not provide any of the seven products, thus they market themselves as a conference venue but fail to provide any conference facilities. Audio-visual equipment was referred to by 44 (58.6%) venues. Those products that require higher levels of expenditure, such as video-conferencing and translation services were offered by relatively few attractions, 14 (18.6%) and 11 (14.6%) respectively. For visitor attractions, cost appears to play a significant part in product provision, with four high cost products (technical support, translation services, video-conferencing and conference bureau) having the lowest level of provision within the entire conference sector. Examining the combination of products, visitor attractions provide the fewest products to conference delegates. The results show that 40 (53.3%) visitor attractions offered two or fewer products, with 33 (78.6%) offering three or fewer products. Only seven (9.3%) offered all six products. This shows that not only do visitor attractions offer the lowest levels of conference facilities, but also the lowest levels of conference products.

Technical services are statistically significant to the 0.001 level with relation to the four venue classification across the U.K. conference sector. A further factor is statistically significant to the 0.005 level, that of audio-visual products. Both video-conferencing and the provision of a conference bureau are statistically significant to the 0.1 level. Thus a relationship exists between the provision of such conference products and venue classification in which they are most and least likely to be found. Finally, for two factors there is no statistically significant relationship, that of basic equipment and translation services. When analysing the cross-tabulated values and statistical significances, the venue classifications that are most likely and least likely to offer such products can be established. This is summarised in Table 7.14.

Table 7.14 – Highest and lowest level of provision of conference products

Conference Facility	Highest Level of Provision (% offering facility)	Lowest Level of Provision (% offering facility)
Basic equipment	Purpose-built (100) Hotels (100) Educational (100)	Visitor Attractions (97.3)
Audio-visual	Educational (95.8)	Visitor Attractions (58.6)
Technical support	Educational (83.4)	Hotels (44)
Translation service	Purpose-built (20.8) Educational (20.8)	Visitor Attractions (14.6)
Video conference	Educational (41.7)	Visitor Attractions (18.6)
Conference bureau	Educational (100)	Hotels (6.2)

In Section 5.3, Crouch & Louviere (2004) identified that the provision of onsite audio-visual equipment was highly significant to association conference organisers.

Additionally, Robinson & Callan (2003a) also identified that 93.7% of the 547 delegates they questioned viewed the availability of audio-visual equipment as important. Furthermore, 88.8% of delegates view the inclusion of basic equipment in the price as important. A range of basic equipment is most likely to be offered by purpose-built, hotels and educational establishments. Educational establishments are most likely to offer all factors listed, although purpose-built is just as likely to offer a translation service. Once again, this supports the view that educational establishments are well suited to host conferences, as many of the products demanded by delegates are already supplied for educational purposes. Visitor attractions do not have the highest levels of provision for any of the six factors examined. Indeed they are least likely to offer four of the six factors, namely basic equipment, audio-visual products, translation services and video-conferencing facilities. This again supports the view of Leask & Hood (2000) who identified the limited facilities offered by visitor attractions as a weakness of this venue classification, refer to Section 4.7. For the other two factors, those of technical support and a conference bureau, hotels are least likely to offer such facilities.

7.3.9 – Type of events / activities offered to delegates

> "A successful venue should offer a flexible, attractive product to the participants, a mixture of offerings creating optimal conditions not only for work and mutual contacts but also for relaxation, entertainment and fun" (Mieczkowski cited in Davidson & Cope, 2003 p.109).

> "By offering facilities and services that satisfy delegates' wishes – and those of their guests, if they are accompanied – to fulfil their leisure and culture pursuits while at the destination, cities are not only adding to their business tourism appeal but are also enabling themselves to maximise the revenue to be made from residential meetings events" (Davidson & Cope, 2003 p.109).

It is clear that the conference product should extend 'beyond the boardroom', Section 5.3 identifies 'extra-conference opportunities' as one of Crouch & Ritchie's (1998) eight conference site selection factors. It is therefore essential to identify which conference venue classification offers such activities outside the working day and if they do, which venue classification offers the greatest range of such activities. The results can be seen in Figure 7.10.

The results suggest that purpose-built conference venues are focused on providing a core conference product and hence the level of provision of recreational activities and events is relatively low. Although two factors which can be catered for in house did receive a high level of provision, that of bars (38 venues or 71.6%) along with banquets and reception facilities (33 venues or 62.2%). Those activities, which could not be catered for in-house received low levels of provision. A total of 15 (28.3%) venues offered social programmes such as a tour of the local area, with 20 (37.7%) venues offering a tour of the venue itself.

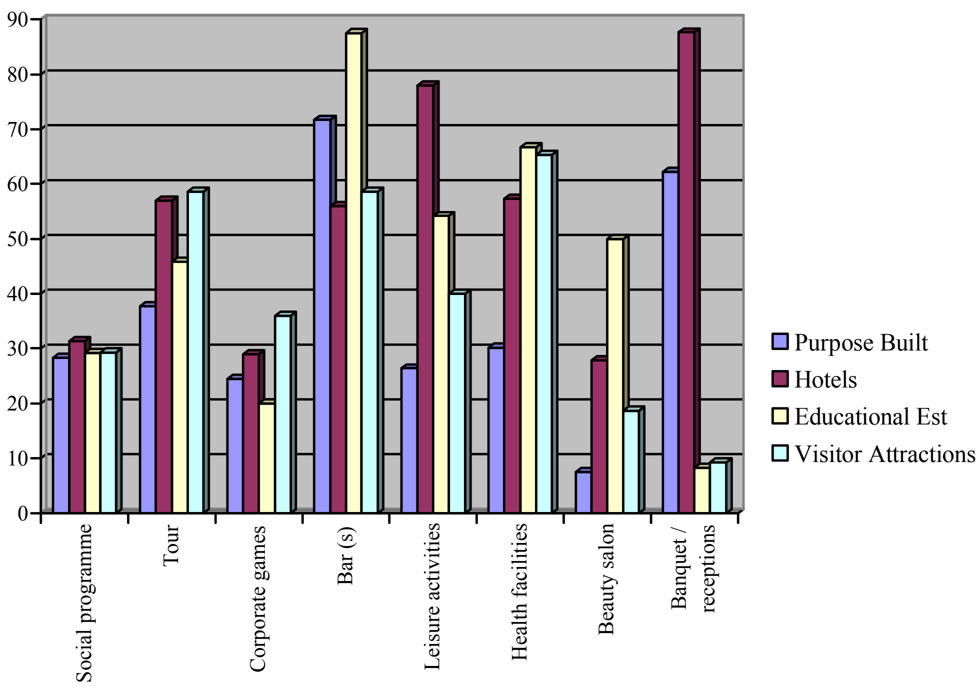


Figure 7.10 – Type of events / activities offered to delegates (Purpose-built N=53; Hotels N=286; Educational Establishments N=24; Visitor Attractions N=75)

A further 13 (24.5%) purpose-built venues offered corporate games, 14 (26.4%) venues offered leisure activities and four (7.5%) venues offered health and fitness facilities. It should also be noted that health facilities, such as a swimming pool, a gym, a sauna and a steam room, are often found in purpose-built venues, but are open to general public use / membership and are not constrained solely to conference delegates. Such facilities are provided as a revenue generator for the conference venue whilst offering a service to the local community. ‘Other’ activities were offered by seven purpose-built venues. These ‘Other’ activities included themed events or themed weekends and theatre performances. When examining the combination of activities and events, the results show that six (11.3%) venues state they do not offer any of the listed events or activities. The majority, 31 (58.5%) establishments stated they offered three or fewer events. Only four (7.5%) purpose-built conference venues offered six or seven activities, of which one (1.8%) offered seven of the eight listed events. These findings support the literature review (refer to Section 4.4), that purpose-built venues offer few events or activities outside of the conference day programme, particularly those that can not be offered on site.

“Leisure activities are important in the marketing of hotels to both business and tourism groups, facilities are normally enclosed such as health, fitness or lifestyle suites, to ensure all-year round availability” (Lawson, 2000 p. 146). For hotels there are three distinct groups with respect to the social activities offered. The first grouping is that of events offered by over 75% of respondents, with two such activities in this group. The most common activity is that of a beauty salon, with 251 (87.7%) hotels doing so, this is followed by 223 (77.9%) hotels offering leisure facilities. The second grouping is activities offered by between 55% and 60% of hotels. These are events such as banqueting / receptions, a tour of the hotel or conference facilities and along with the availability of bars. These are offered by 164 (57.3%), 163 (56.9%) and 160 (55.9%) hotels respectively. The final group of activities are offered by less than a third of hotels. An organised social programme was offered by 90 (31.4%) hotels, corporate games by 83 (29%) hotels and health / swimming facilities by 80 (27.9%) hotel venues. A further 26 (9%) hotels offered activities and/or events not listed in the questionnaire, these include a nightclub and shopping facilities.

When examining the combination of events / activities offered by hotels it can be seen that 106 (37.1%) hotels offer three or fewer activities, in comparison with 180 (62.8%) hotels offering four or more events. Less than a third (84 hotels or 29.3%) offer six activities or more. Moreover, 23 (8%) venues offered eight or more of the nine activities listed. Hotels offer a higher number of events and activities when compared to purpose-built venues, this is because many of the activities are dual purpose, in that both non-delegates and conference delegates can use them.

For educational establishments, there are three distinct groupings with respect to the social activities offered. The first is that of activities supported by more than 60% of respondents. This includes 21 (87.5%) educational establishments that offer the delegates bar facilities. Banqueting / receptions and functions facilities were offered by 16 (66.66%) educational establishments. This is closely followed by the second grouping of activities supported between 30% and 60% of educational establishment's venues. This includes leisure activities, offered by 13 (54.16%) venues, health facilities by 12 (50%) venues and a tour of the establishment or conference facilities by 11 (45.83%) venues. The final group of activities are offered by less than a third of educational establishments. For instance an organised social programme is offered by seven (29.16%) establishments, corporate games by five (20%) venues, beauty salons offered by two (8.3%) venues. 'Other activities', such as a museum, are offered three (12.5%) educational establishments. The majority of respondents, 13 (54.16%) offered by three or fewer activities to their conference delegates. Whereas 11 (45.83%) responding educational establishments offered four or more activities or events. Only five (20.83%) educational establishment venues offer six activities or more and one (4.2%) of educational establishments offer eight or more of the nine activities listed.

The earlier findings suggest that this classification provides a high standard of conference facilities. However, these results show that educational establishments have limited social events and activities catering for the conference delegate. This is in contrast to the hotel venues that have a limited conference product, but offered a greater variety of social events and activities. The findings suggest that educational establishments should take greater consideration in this area and design social programmes and activities for future conferences. This would improve their overall conference package.

For visitor attractions the most common event or activity offered are banquets and receptions, with 49 (65.3%) attractions doing so. A further 44 (58.6%) venues provided both bar facilities and a tour of the attraction, with the latter being the principle appeal of these venues. A social programme creates a competitive advantage over other conference venue classifications that do not offer such activities. In order to appeal to the corporate market, visitor attractions need to provide a package of services that enables both the provision of meeting facilities and a social programme. “As it is the attraction of unusual venues that they can give an event a special appeal and can make it memorable for years afterwards” (Roger, 1998 p.39). The following three activities are provided to offer such a corporate activities package. Leisure activities, corporate games and social programmes are offered by 30 (40%), 27 (36%) and 22 (29.3%) attractions respectively. A range of such activities offered to delegates include 4x4 driving courses, archery, clay pigeon shooting, go-karting, skiing, riding facilities, croquet, tennis and putting, as well as wine tasting and a safari park. The combination of events and activities offered shows that 38 (50.7%) venues offered three or fewer activities. Moreover, 12 (15.9%) venues offer six or more activities or events. Overall, four (5.3%) venues offer all eight activities. This research shows a low number of events and activities offered by visitor attractions, however, this low response rate may be due to the fact that attractions may specialise in one single unique product, i.e. wine tasting and hence do not offer a wide range of other activities.

There are four factors which are statistically significant to the 0.001 level across the sector in relation to the venue classification that of the provision of a bar, health facilities, banquet / receptions and beauty salon. A single factor is significant to the 0.05 level, that of a tour of the conference venue / attraction and a further factor is significant to the 0.1 level which is the provision of leisure activities. A further two factors, that of a social programme and offering corporate games are not statistically significant. When analysing the cross-tabulated values as well as the statistical significances the distinct venue classifications that are most likely and least likely to offer such facilities can be established, this is summarised in Table 7.15.

Table 7.15 – Highest and lowest level of provision of recreational events / activities

Conference Facility	Highest Level of Provision (% offering facility)	Lowest Level of Provision (% offering facility)
Social programme	Hotels (31.4)	Purpose-built. (28.3)
Tour	Visitor Attractions (58.6)	Purpose-built. (37.7)
Corporate games	Visitor Attractions (36.0)	Educational Est. (20.0)
Bar(s)	Educational Est. (87.5)	Hotels (56.0)
Leisure activities	Hotels (78.0)	Visitor Attractions (26.4)
Health facilities	Educational Est. (66.7)	Purpose-built. (30.2)
Beauty salon	Educational Est. (50.0)	Purpose-built. (7.5)
Banquets / Receptions	Hotels (87.7)	Educational Est. (8.3)

In conclusion to this section the highest levels of provision are split between three conference classifications. Hotels have the highest provision of social programmes, leisure activities as well as banquets and receptions. This compares to educational establishments which offer the highest levels of bars, health and beauty facilities. Tours and corporate games are most likely to be offered by visitor attractions.

Purpose-built venues do not feature as the most likely provider of any event or activity, but rather appear as the least likely to provide four of the eight factors. These are the availability of a social programme, a tour of the venue as well as health and beauty facilities. Thus, depending upon the style of conference required a choice of venue can be made. For example a more incentive based package would be best suited to a hotel environment, whereas team building activities would be best suited to a visitor attraction. Finally, if no social events or activities were required then the conference organiser may choose a purpose-built venue. The availability of activities and events outside of the conference day has been identified as one aspect of the site selection process. It is concerning to identify that purpose-built venues are not offering the social events and activities which are predominantly offered by other styles of conference venue. In comparison to visitor attractions and educational establishments which tend to offer a wide range of facilities for the conference delegates. For purpose-built venues, to remain competitive they should begin to provide a conference package that includes incentive activities, even if these are arranged via an external organisation and occur off-site, for example a visit to a local visitor attraction.

7.3.10 – The catering facilities utilised

It is important to identify the catering facilities which are utilised in order to establish if conference venues are able to offer a complete conference package, i.e. including catering for large numbers of delegates. The results show that in-house catering dominates across the four venue classifications, with 39 (73.6%) purpose-built conference venues, 276 (96.5%) hotels, 21 (87.4%) educational establishments and 54 (74.3%) visitor attractions providing in-house catering. A total of eight (15.1%) purpose-built venues contract in catering services and six (11.3%) utilise both in-house and contract caterers. This would suggest that the majority of purpose-built facilities have large catering facilities that can cater for conferences and banqueting events.

Only two (0.7%) hotels contract in catering services, of which one is an independent hotel with only 23 bedrooms, the second venue is a four star rural chain hotel with 50 bedrooms. A further eight (2.8%) hotels utilise both in-house and contract catering services. Hotels may contract in services when their in-house facilities are not sufficient. Only one (4.2%) educational establishment contracted in catering services. Moreover, two (8.3%) venues utilise both in-house and contract in catering services. In contrast, 13 (17.3%) visitor attractions contract in catering services and eight (10.7%) utilise both in-house and contract caterers. The research highlights that the four conference venue classifications are able to offer a conference package that includes the ability to provide in-house catering facilities. Conversely, in a minority of cases both purpose-built and visitor attractions contract in catering facilities and this is presumably when large conferences are held. These factors have a statistically significant relationship at the 0.001 level, which means that there is a relationship between the venue classification and the catering service used, either in-house or contracted in.

7.3.11 – Conference services ranked

It is important to examine such rankings as this identifies both perceived strengths and weaknesses within each venue classification. The results will also highlight the perceived competitive advantage of each venue classification. Lists of ten services were provided and a ranking of one to ten applied, where one indicated a highest level of importance and ten the lowest level. These factors have been cross-tabulated against the four venue classifications, with the results being listed in Appendix D, Tables 7.16 through to Table 7.19, (refer to pages 466 to 469) and the top three factors for each classification are shown in Table 7.20.

Table 7.20 – Conference services ranked; top three ranked

Rank	Purpose Built	Hotels	Educational Establishments	Visitor Attractions
1	**High level of service and customer-oriented staff**	**High level of service and customer-oriented staff**	Venue provides wide range of meeting capacities	**High level of service and customer-oriented staff**
2	Venue provides wide range of meeting capacities	Venue provides wide range of meeting capacities	**High level of service and customer-oriented staff**	Venue has a unique experie nce
3	Excellent communication links provide easy access	Venue has in-house accommodation	A conference bureau service is provided	Venue provides wide range of meeting capacities

There are similarities across all four venue classifications, which can be seen in Table 7.20. A high level of service and customer-oriented staff is ranked first for three venue classifications, with educational establishments ranking it second. This factor has an average ranking of 2.1, 2.5, 2.6 and 2.9 for hotels, visitor attractions, purpose-built and educational establishments respectively. The standard deviation for all four venue classifications is between 1.62 and 1.8, with visitor attractions being the former and educational establishments the latter. These low values for standard deviation suggests that the distribution of responses is clustered around the mean and therefore the mean can be considered as representative of the sample.

"Professional conference organisers know the features and facilities necessary to make a particular event work, competent staff and overall reliability are key qualities, often over cost" (Shallcross, 1998 p.B51). In light of Robinson & Callan (2002; 2003) findings (table 5.2) that competence (e.g. efficient processes) and service providers (e.g. competent, experienced and friendly staff) are ranked first and third respectively by delegates. This research identifies that for the four venue classifications, high levels of service and customer-oriented staff is seen as the most important conference service offered to the delegate.

Educational establishments rank the provision of a wide range of meeting capacities first. It has an average ranking of 2.4 for educational establishments, while purpose-built and hotels rank this factor second, with an average ranking of 2.8 and 3.4 respectively. Visitor attractions rank this factor as third, with an average ranking of 3.8. The standard deviation for these ranking varies between 1.79 for educational establishments and an upper value of 2.89 for visitor attractions. These increased standard deviation values suggest that the distribution of responses around the mean is increasing and thus there is a greater variety in the ranking provided by respondents. The number of delegates that any venue is capable of holding is of fundamental importance in respect to what type of conference the venue can hope to attract (Davidson & Cope, 2003). Hence for each of the four venue classifications possessing a wide range of meeting capacities is essential in attracting a wide range of meeting types.

Differences appear with regards to the third factor that makes up the top three conference services for each venue classification. In each case this third factor is specific to the venue classification. For instance, purpose-built respondents cite 'excellent communication links provide easy access' as their third most important factor, with an average ranking of 4.5, and a standard deviation of 2.4. This is likely to be the case as purpose-built venues are located centrally within urban areas and have easy access to major roads and motorways. As Section 4.4 highlighted, a study by Coopers Deloitte (Richards & Richards, 1994) indicated that accessibility is paramount, particularly the proximity of a motorway and a major city, as conference delegates must be able to attend the conference with minimal travelling time to the destination. To reduce travel costs and paid-time for travelling, conference organisers will prefer to choose a conference venue which is accessible by all modes of transportation. This research has identified that both suppliers and consumers of conference products offered by purpose-built venues consider accessibility as important.

For the hotel respondents, the third most important factor is the provision of in-house accommodation, with an average ranking of 3.6, and a standard deviation of 2.12. Hotels have a competitive advantage over the other three venue classifications with regards to the provision of accommodation (refer to Section 7.3.4). Accommodation has already been developed for non-delegates and the level of facilities is greater than the other three venue classifications. Therefore, hotels are the major benefactors of attracting residential conferences, with 90% of residential conferences being held in hotels (British Tourist Authority, 2002). All other venue classifications did not state that offering in-house accommodation was an important conference service due to offering basic or no accommodation facilities.

Educational establishments rank the availability of a conference bureau service third with an average ranking of 4.2 and a standard deviation of 2.13. In Section 7.3.5 it was seen that every responding educational establishment provided a conference bureau. Educational establishments tend to market their own conference facilities by relying on the status of the university, rather than marketing through an intermediate such as a conference organiser. Lastly, visitor attractions saw their 'venue has a unique experience' as being the second most important factor, with an average ranking of 3.4 and a standard deviation of 2.28. This unique experience offered by visitor attractions is seen as their competitive advantage over the other three venue classifications. This finding supports the view discussed in Section 5.7.1, which suggests that the conference delegate is demanding a new style or experience at a conference and it is visitor attractions which are satisfying this new demand.

7.3.12 – Conference reservations

Over 60% of venues across the sector receive bookings directly from conference organisers. With regards individual venue classifications 42 (79.2%) purpose-built, 179 (64.6%) hotels, 22 (91.7%) educational establishments and 68 (90.7%) visitor attractions receive booking directly, rather than through a third party. Undertaking chi-square test regarding the venue classification and whether the venue received booking directly identified that this relationship is statistically significant at the 0.001 level.

7.3.13 – Conference venue activities

The questionnaire requested respondents to identify the types of activity hosted in their venues. In identifying the distinguishing characteristics of each venue classification in response to both Objective One and hypotheses one, this question aimed to identify whether certain venue classifications were associated with specific conference activities. Principally these activities were;

- Conferences / Business Meetings
- Trade Shows / Exhibitions
- Performances / Entertainment
- Banquets / Functions / Receptions

The results can be seen in Appendix D, Tables 7.21 through to Table 7.36 (refer to page 470 to 474 inclusive). Table 7.37 shows the temporal development of conferences and business meetings for each venue classification from 1997 through to 2001, using the mean values identified in Tables 7.21, 7.25, 7.29 and 7.33.

Table 7.37 – The number of conference / business meetings held by venue classification; 1997 - 2001

	1997	1998	1999	2000	2001*	% increase 1997 – 2001
Purpose-built	42.4	54.7	98.9	230.7	132.4	212
Hotels	211.3	197.1	247.4	366.1	351.5	66.3
Educational Establishments	742.1	763.4	788.5	192.8	761.6	2.6
Visitor Attractions	221.3	260.8	273.2	623.2	259.5	17.3

* indicates predicted value

The values of N can be obtain from the relevant table in Appendix D, Table 7.21 through to Table 7.36, (refer to pages 470 to 474 inclusive)

Table 7.37 identifies that that all venue classifications have shown an increase in the number of conference and business meetings they have hosted between 1997 and their expected predicted value for 2001. Educational establishments have experienced the lowest overall growth of 2.6%. However, this venue classification holds the largest absolute number of conference and business meeting, which is predicted to be approximately 761 for 2001, although in 2000 educational establishments recorded a drop to an average of 192.8 conferences / business meeting for that year. Visitor attractions peak in 2000 when an average of 623.2 conferences and business meeting were held at such venues. This value is predicted to fall to 259.5 and thus the estimated growth rate over the period is 17.3%. Hotels have experienced a 66.3% growth over the five year period. The largest growth rate is seen in the purpose-built venues, at 212%, although this venue classification has the lowest level of in terms of absolute numbers of conferences and business meetings. The increase in the number of conferences and business meetings peaked for this venue type in 2000, at an average of 230.7. Therefore, although it is undertaking the smallest number of conferences and business meetings, the level of growth it has been experiencing is the highest across the four venue classifications.

Table 7.38 shows the mean values for all four venue classifications with respect to trade shows and public exhibitions between 1997 and 2001.

Table 7.38 – The number of public exhibitions / trade shows by venue classification; 1997 - 2001

	1997	1998	1999	2000	2001*	% increase 1997 - 2001
Purpose-built	10.7	16.1	17.1	19	18.1	69.2
Hotels	6.3	49.3	5.8	6.9	8.2	30.1
Educational Establishments	1.3	2.3	2.3	2.7	3.6	177
Visitor Attractions	10.3	13.8	16.6	13.7	18.8	82.5

* indicates predicted value

The values of N can be obtain from the relevant table in Appendix D Table 7.21 through to Table 7.36, (refer to pages 470 to 474 inclusive)

The greatest level of growth experienced during this period can be seen in educational establishments, at 177%. The lowest level of growth can be seen in hotels, which experienced 30.1% growth over the period. In terms of absolute numbers, visitor attractions are hosting the most trade shows and exhibitions.

Table 7.39 identifies absolute numbers and growth rates for the four venue classifications in relation to the hosting of performances and entertainment.

Table 7.39 – The number of performances / entertainment by venue classification; 1997 - 2001

	1997	1998	1999	2000	2001*	% increase 1997 - 2001
Purpose-built	42.8	43.7	39.4	63.8	37.2	-13
Hotels	56.9	10.8	53.2	12.4	13.8	-75.7
Educational Establishments	7.6	2.4	3.9	10.1	4.5	-40.7
Visitor Attractions	10.1	11.4	14.7	15.7	27.7	174

* indicates predicted value

The values of N can be obtain from the relevant table in Appendix D, Table 7.21 through to Table 7.36, (refer to pages 470 to 474 inclusive)

This table differs from Tables 7.37 and 7.38 in that it identifies that the level of growth has actually fallen for three venue classifications, that of purpose-built, hotels and educational establishments with -13%, -75.7% and -40.7% respectively. The only venue classification to experience growth over the period 1997 – 2001 is that of visitor attractions which grew at 174%. Overall purpose-built venues remain the most popular venue classification to host performances and entertainment, as many such venues are multi functional and designed specifically to host a range of performances and entertainment. Table 7.38 also identifies that in 1998 hotels experience a peak in demand, hosting an average of 49.3 public exhibitions and/or trade shows, before falling back to an average of 5.8 per year.

The growth and decline of banquets, receptions and functions is shown for the four venue classifications between 1997 and 2001 in Table 7.40.

Table 7.40 – the number of banquet / receptions / functions by venue classification; 1997 - 2001

	1997	1998	1999	2000	2001*	% increase 1997 - 2001
Purpose-built	29.5	35.6	49.1	57.6	68.4	131.9
Hotels	39.5	111.8	54.5	89.1	114.9	190.9
Educational Establishments	24.9	27.9	28.7	102.9	35.5	42.6
Visitor Attractions	77.3	106.5	105.1	100.6	83.2	7.6

* indicates predicted value

The values of N can be obtain from the relevant table in Appendix D, Table 7.21 through to Table 7.36, (refer to pages 470 to 474 inclusive)

Hotels host the greatest number of such events, with an predicted mean value of 114.9 for 2001. This venue classification has also experienced the greatest level of growth over the period, at 190.9%. As with public exhibitions and/or trade shows, hotels experienced an increase in demand in 1998 for banquets, receptions and functions, rising to an average of 111.8 for that year, before falling to 54.5 in 1999. The lowest level of growth has been experienced by educational establishments, at 42.6%, although this venue did experience a peak in 2000, with an average of 102.9 banquet, receptions and/or functions

Table 7.41 summaries the findings from Tables 7.37 to 7.40.

Table 7.41 – A summary of the favoured venue classification and greatest growth rates in relation to venue hosting activity

	Favoured venue	Greatest growth
Conferences / Business Meetings	Educational Establishments	Purpose-built
Trade Shows / Exhibitions	Visitor Attractions	Educational Establishments
Performances / Entertainment	Purpose-built	Visitor Attractions
Banquets / Functions / Receptions	Hotels	Hotels

Overall from Table 7.41 it can be identified that differing venue classifications are indeed favoured for different event activities. Educational establishments attract the greatest level of conference and business meetings, although purpose-built venues are experiencing the greatest levels of growth. Visitor attractions are favoured for trade shows and exhibitions although educational establishments are experience the greatest growth in hosting such events. Performances and entertainment are most likely to be held at purpose-built venues, although they have a negative growth rate. Visitor attractions are experiencing the greatest levels of growth for performances and entertainment. Finally, hotels are the favoured venue classification for banquets, functions and receptions and this venue classification is also experiencing the greatest level of growth for this activity.

7.3.14 – The number of employees within the four venue classifications

Section 7.3.9 identified that customer service was ranked either first or second for all four venue classifications. Additionally, Section 7.3.13 identified that differing venue classifications are favoured for differing events. Respondents were then questioned regarding the level of employees at the venue. For hotels, educational establishments and visitor attractions the total number of employees within the business was establish, along with the number of employees utilised by the conference venue alone. In Appendix D, Tables 7.42 to 7.45, (refer to page 475 and 476) details the number of full and part-time employees at the four different venue classifications.

From Table 7.42 the number of full-time employees at purpose-built venues ranges from a minimum of four to a maximum of 1260. The venue which employs just four full-time employees was a small multi-purpose establishment offering no accommodation. The modal value is eight employees, however, the average is 106.5. This suggests there are a few purpose-built venues that employ a large number of full-time employees. The number of part-time employees at purpose-built venues ranges from a minimum of zero employees to a maximum of 700. The venue employing 700 part-time staff was a large multi-purpose venue in central London, which also employed 150 full-time employees. The modal value is zero suggesting that purpose-built venues have little demand for part-time employees, although the average is 77.4. This again suggests there are a few venues that employ large amounts of part-time employees.

In Section 3.4, the literature review highlights the PwC (2000) study which identifies that on average 157 employees work in a conference / trade centre, this research differs from the PwC (2000) research in that it identifies an average of 106 full-time employees at purpose-built venues. Fenich (1992) highlights one of the reasons for constructing a purpose-built venue is the creation of employment opportunities, however, this research highlights that for purpose-built venues the average number of directly employed individuals is relatively low. Although indirect employment opportunities will be created as conferences generate revenue and jobs in a wide spectrum of the tourism industry, such as hotels, resorts, restaurants, airlines, car rentals, bus companies and sightseeing companies (Fenich, ibid).

Of the 242 valid hotel respondents the mean number of employees who worked in the hotel, on a full-time basis is 62.9 and part-time is 31.5, this is shown in Table 7.43, Appendix D (refer to page 475). The average number of people employed in the conference venue alone and who work on a full time basis is 5.8 and on a part-time basis is 6.4. Interestingly the minimum number of hotel employees in the conference centre (full time and part time) is zero, this clearly shows that in some hotels they have no specific conference employees thus staff from the main hotel also run the conference facilities as part of their job. Hotels do not have a separate conference department, or specifically trained staff. On days of conferences, many of the hotel employees will be assigned to jobs that serve the conference delegates. Few employees are available specifically for the conference department, if any. Conversely, to be included in this survey, the hotels had advertised as a hotel with conference facilities, but clearly not all hotels have specifically trained conference staff.

Table 7.44 (Appendix D, refer to page 476) shows the average number of full-time employees who work at an educational establishment is 1052.7 and part-time is 325.5. Although educational establishments are often large organisations and thus inherently employ large numbers of employees, by identifying the overall number of employees the proportion assigned solely to conference activities can be established. With regards to those working solely for the conference facilities, this ranges from zero to 400 for full-time employees and between zero and 200 for part-time. The average is 45.1 and 25.1 respectively. These results show that educational establishments' conference facilities employ few full time staff and may employ large numbers of part-time staff, in the case of a large conference or event. The results show that 4.3% of the educational establishments' staff is employed full time in the conference facilities and 7.7% of the part time staff is employed at the conference facilities.

The number of full-time employees who work at visitor attractions ranges from a minimum of two to a maximum of 400, with an average of 59.4 full time employees. Visitor attractions employ a minimum of zero and a maximum of 700 part time employees, giving an average of 52.2 part-time employees, this is seen in Table 7.45, Appendix D, (refer to page 476). With regards to those employed specifically for conference duties this ranges from zero to 86, with an average of 11.3, along with an average of 13.9 part-time employees, ranging from a minimum of zero to a maximum of 200. The results show that on average 18.6% of the visitor attractions staff are employed full time in the conference facilities and 24.0% of the part time staff are employed at the conference facilities.

7.3.15 – Length of service

The length of service was obtained from Part One of each of the four venue classification questionnaires. There are many similarities within the four venue classifications, particularly with respect to the average length of service and the modal value of respondents, as shown in Table 7.46.

Table 7.46 – The length of service of conference venue employees

Length of service (yrs)	Purpose Built	Hotels	Educational Establishments	Visitor Attractions
Minimum	0.25	0.1	0.25	0.2
Maximum	35	30	25	23
Average	5	4.6	6	6.2
Modal	2	1	1	2
Majority	> 5 yrs	< 3 yrs	< 5 yrs	< 4 yrs

(Purpose-built N=53; Hotels N=286; Educational Establishments N=24; Visitor Attractions N=75)

Concerning the former, the average length of service ranges from 4.6 years for hotels to 6.2 years for visitor attractions, which a range of only 1.6 years covering all four venue classifications. The modal value is either one or two years for all venue categories. When examining the length of service for the majority of respondents it can be seen that purpose-built differs from the other three venue categories, with the majority being employed for more than five years. For the other three venues, the majority of staff has been employed for less than five years in the case of educational establishments, four years for visitor attractions and three years for hotels. For the latter two venues this transient workforce is likely to be a result of seasonality within the general tourism market. It can be concluded that with regards to the length of service all four venue classifications are characterised by a relatively transient workforce, although purpose-built venues do have a higher level of non-transient employees than the other three venue classifications. This is due to training as employees of purpose-built venues are specifically trained in the conference sector.

7.3.16 – Funding of conference venues

The following discussion aims to identify whether U.K. conference venues received any form of grants or subsidies for the construction, maintenance or running costs. The results show 12 (22.6%) purpose-built venues and 15 (20%) visitor attractions received grants and/or subsidies. No hotels or educational establishments received grants or subsidies for their conference facilities. Of the 12 purpose-built venues two (16.6%) venues were funded by the central government. Nine (75%) venues received local government funding and the remaining venue (8.4%) received funding from another source, this being English Partnership in 1996.

Respondents where then asked whether or not the venue was reliant upon such grants for its operation and success. The results show that five purpose-built venues stated that they were highly dependent and five venues stated that they were dependent upon such grants or subsidies for its continued operation. Of the ten responding visitor attractions, five (50%) stated they were highly dependent, with a further four (40%) stating they were dependent and one (10%) stated its level of dependency was average upon such a grant. The research results show an extremely low level of government funding provided by the local or central governments. This suggests that the majority of funding was sourced privately. The funding received by venues was often a one-off payment and few venues received a regular grant. These results agree with The British Association of Conference Destinations (1998) SWOT analysis that the U.K. conference sector is under threat from a lack of government funding and support.

7.3.17 – The general characteristics of the conference delegates

The previous discussion has examines the characteristics of the four venue categories, discussion continues by examining the differing characteristics of conference delegates that each of the venue categories attracts. In identifying the characteristics of the four venue classifications, the questionnaire aimed to identify whether any specific venue classification was associated with specific delegate attributes.

7.3.17.1 – Average number of delegates per event

It is in order to establish which conference venue classification appeals to larger conferences in terms of delegate numbers and which venue classification appeals to smaller conferences, respondents were requested to detail delegate visitor numbers. As stated in Section 1.9 to Section 1.9.3 the conference sector buyers can be split into three main groups, that of corporate, association and government (British Tourist Authority, 1998). The British Conference Market Trends Survey (1999) Annual Report states that the average number of delegates per conference for association delegates was 79, corporate delegates 39 and for government delegates 47. This question was omitted from the British Conference Market Trends Survey (2001) Annual Report. As the British Conference Market Trends Survey differentiated between the three delegate types, the questionnaire utilised these three groups. The results of this question can be seen in Appendix D, Tables 7.47 through to 7.54, (refer to pages 477 and 481). This thesis identifies that the average number of delegates per conference, across the four venue classifications is 116 for association delegates, corporate delegates 79 and for government delegates 77. This is considerably higher than the British Conference Market Trends Survey (1999) survey and suggests that average conference sizes have increased since 1999.

With regards to purpose-built venues, the mean for association delegates was 160.7, corporate delegates 92.6 and for government delegates 117.1. With purpose-built venues generally holding the larger events, it can be seen that for all three delegate types the average number of delegates are larger than the British Conference Market Trends Survey (1999) sector average. With regards to the four venue classifications, for association and government delegates, purpose-built venues hold the largest events in terms of average delegate numbers. This supports the earlier findings in Section 7.3.3 of this research that identifies purpose-built venues offering the largest theatre style capacity and the largest capacity for conference delegates. Purpose-built venues supply ideal conference facilities for both large association and government meetings. Overall association meetings are larger than corporate meetings (Crouch & Weber, 2002) and therefore will require larger conference facilities.

Respondents were asked the average number of delegates per event held at hotel conference venues. The average number of association delegates was 57.3, for corporate delegates 61.4 and for government delegates 32. Hotels have lower levels of delegate numbers for association and government delegates when compared to the British Conference Market Trends Survey (1999) sector average. Across the four venue categories, hotels have the lowest average number of delegates for association and government conferences. The findings support the fact that hotels predominantly cater for the smaller conferences due to the size of their facilities, as stated in 7.3.3. It is therefore the corporate market which often hosts their conferences in hotel premises. This is supported in the literature review in Section 1.9.1. Corporate meetings tend to have a small number of delegates, generally less than 100 and are often short in duration (Lawson, 2000).

The average number of association delegates per event was 110.6 for educational establishments. The average number of corporate delegates per event was 49.8 and for government delegates 55.7. The results are higher than the average numbers of delegates provided by the British Conference Market Trends Survey (1999) sector average, although for corporate delegate's educational establishments have the lowest average number of delegates across all four venue classifications. The results suggest that educational establishments would predominantly cater for the association market due to offering large conference facilities rather than the corporate market that demand smaller venues. Unlike corporate meetings, attendance at association meetings is optional, as the delegates pay their own registration fee and accommodation (Hoyle et al, 1995; Opperman & Chon, 1997) and therefore would choose educational establishments as they offer cheaper accommodation facilities than many hotels.

The average number of association delegates per event for visitor attractions was 135.5, whereas for corporate delegates it was 112.7 and 105.3 for government delegates. These results suggest that there are approximately double the numbers of corporate and government delegates that attend conferences at visitor attractions in comparison to educational establishments. For all three delegate types the figures are above the British Conference Market Trends Survey (1999) sector average. The earlier findings in Section 7.2.3 suggest that both educational establishments and visitor attractions have average sized conference venues. The discussion in this section also supports this view with regards to the delegate numbers.

7.3.17.2 – Average length of stay for delegates

The U.K. Conference Market Survey (2002) identified that the length of corporate meetings decreased from 1.7 days in 1999 to 1.3 days in 2001 (Meetings Industry Association 2002). Davidson & Cope (2003) noted that according to the U.K. Conference Market Survey (2002) the average length of an association meeting declined from 2.2 days in 1998 to 1.8 days in 2001, refer to Section 3.4. "Conference tourism is capable of generating more visitors who can stay in a destination for longer periods of time and spend more money than most other types of visitors" (Hunt, 1989 p.57). It is therefore important to identify the average length of stay per delegate for each venue classification in order to identify which venue classification attracts the longest and shortest conferences in terms of duration. This research identifies that across the conference sector the average length of an association meeting is 1.7 days, whereas an average corporate meeting lasted for 1.4 days and government meetings last on average 1.3 days. These findings are very similar to the U.K. Conference Market Survey (2002) as highlighted above. Distinct venue classifications shall now be discussed.

For purpose-built venues, association conferences last on average for 1.3 days, corporate 1.1 days and government lasting a single day, which is shown in Appendix D, Table 7.51, (refer to page 478). Indeed this venue classification is characterised by holding the shortest corporate and government conferences across the four venue classifications. These results are surprisingly low, considering that purpose-built venues often attract large association conferences that traditionally last more than one day. This is not an ideal situation, as Section 3.4 states, the aim of purpose-built venues is to attract delegates who stay within the destination generating revenue within the local economy purchasing accommodation, food, beverages and entertainment. To generate greater revenue for the local economy the conference venue should promote conferences to non-local delegates, who are more likely to stay in the host community longer.

For hotels Table 7.52 in Appendix D (refer to page 478) shows that on average, association delegates stay 1.6 days, corporate delegates stay 1.8 days and government delegates 1.5 days. These results are slightly higher than those for purpose-built venues, as hotel conference facilities offer their delegates a conference package including accommodation and often leisure facilities. The results show that the average length of stay is just over 1.5 days, suggesting that the majority of delegates do stay one night during their conference. The results show that hotels have a quick turnover of guests, as the conferences are less than two days duration. For association and government delegates the average length of stay within hotels is similar to the sector average, whereas corporate delegates stay for longer than average within hotels.

As the literature review in Section 4.6 highlights, the majority of educational establishments can provide accommodation for large conferences. The results in Table 7.53 in Appendix D (refer to page 478) suggest that association delegates stay on average 2.7 days, corporate delegates stay on average for 1.8 days and government delegates stay for 1.5 days. These results are longer than the sector average and are the longest average duration of stay across the four venue classifications for all delegate types.

The majority of visitor attractions do not offer accommodation facilities, however, they may utilise neighbouring hotels for accommodation needs. The findings in Table

7.54 in Appendix D, (refer to page 478) show that association delegates stay the longest, with an average of 1.2 days. In comparison to both corporate and government delegates who stay on average 1.1 days. These are considerably lower than the sector average and for all delegates types this venue classification has the shortest conference duration across the four venue classifications.

To conclude, the results identify that in comparison with the U.K. Conference Market Survey (2002) that suggests that the length of stay per delegate is declining. The results also suggest that of the four venue classifications, it is the educational establishments and to a lesser extent hotels, that are characterised by attracting the longest conferences for all delegate types. For all delegate types, visitor attractions have the shortest conference duration across the four venue classifications, probably due to the lack of accommodation facilities.

7.3.17.3 – Average daily spend of delegates

Respondents were questioned about the general characteristics of their conference delegates. Respondents were initially asked about the average daily spend per delegate. Although as with other financial questions very few respondents supplied a figure, therefore discussion will be limited to frequencies and cross tabulation of data. A summary of the average daily spending of delegates can be seen in Table 7.55.

Table 7.55 – Average daily spend of association, corporate and government delegates (£)

Delegate	Purpose Built (£)	Hotels (£)	Educational Establishments (£)	Visitor Attractions (£)
Association	**65.58** (n=16)	42.34 (n=35)	42.25 (n=12)	*33.10* (n=26)
Corporate	**72.40** (n=17)	58.08 (n=33)	*47.18* (n=16)	59.78 (n=30)
Government	**90.00** (n=16)	40.76 (n=33)	38.33 (n=13)	*37.05* (n=27)

Figures in **bold** indicate highest value for delegate type

Figures underlined indicate lowest value for delegate type

For purpose-built conference venues the average daily spend by an association delegate was £65.58; in comparison to the average spend of £72.40 from a corporate delegate. Additionally, government delegate's average daily spend was £90. In all three cases purpose-built venues have the highest level of delegate spending for the three delegate types. The average daily spend by an association delegate in hotel conference facilities was £42.34, in comparison to the average spend of £58.08 from a corporate delegate and an average spend of £40.76 for a government delegate.

At educational establishments, the average daily spend by an association delegate was £42.25, in comparison to the average spend of £47.18 from a corporate delegate, which is in fact the lowest level of expenditure for this delegate type. For government delegates the daily spend was on average £38.33 on average per person.

For visitor attractions the average daily spend by an association delegate was £33.10, in comparison to the average spend of £59.78 from a corporate delegate and £37.05 for a government delegate. For both association and government delegate's visitor attractions received the lowest levels of delegate expenditure.

7.3.17.4 – Local and Non Local Delegates

It is important to identify where the conference delegates come from as delegates that are predominantly local, may be less likely to require overnight accommodation. Whereas non-local delegates are more likely to require accommodation facilities and therefore extend their visit within the destination. Table 7.56 shows whether local or non-local dominate for each delegate type for each of the conference venue classifications.

On average, for purpose-built venues 52% of association delegates are non-local. For corporate delegates 57.3% are local and 54% of government delegates are local. This suggests that the association delegates have the greatest number of non-local delegates, and thus this delegate group may generate more money for the conference town as they may stay over night in the local accommodation. The majority of government delegates are local and therefore may not stay overnight in the conference destination.

Table 7.56 – Local or non-local by delegate types and conference sectors

Delegate	Purpose Built (%)	Hotels (%)	Educational Establishments (%)	Visitor Attractions (%)
Association	Non-local (52)	Non-local (52)	Non-local (67.4)	Local (69)
Corporate	Local (57.3)	Non-local (56)	Local (54.6)	Local (60.6)
Government	Local (54)	Non-local (54)	Local (74.2)	Local (77.8)

For hotels, on average, 48% of association delegates are local and 52% are non-local. Lawson (2000) suggests that there are fewer association meetings in hotels than corporate meetings. However, many conferences have 100-200 delegates and generally last between 2-4 days. Lawson suggests that the association conference organiser is more location and cost conscious in choosing their accommodation. For corporate delegates, an average of 44% are local and 56% are non-local. Interestingly, Lawson (2000, p.125) suggests that "corporate choice for hotels is often made first on the basis of its location in relation to the company's business interests". Suggesting that companies may book accommodation for their conferences, but the major consideration is the time taken to reach the destination, as 'time cost money' in paying their workforce to travel to the conference destination. Finally, the results show that 46% of government delegates are local and 54% are non-local.

For educational establishments, on average, 32.6% of association delegates are local and 67.4% are non-local. For corporate delegates on average, 54.6% are local and 45.4% are non-local and 74.2% of government delegates are local and 38.8% of government delegates are non-local, as shown in Table 7.56. This suggests that government delegates have the greatest number of local delegates, which generates the least revenue for the destination, as few stay overnight. Furthermore, educational establishment generate the greatest number of overnight stays from association conferences that are predominantly non-local.

The results suggest that the majority (over 60%) of all delegates which use visitor attractions as conference facilities are from the local vicinity, as shown in Table 7.56. This may be due to the lack of accommodation facilities available at the visitor attraction. On average, 69% of association delegates are local and 31% of association delegates are non-local. On average, 60.6% of corporate delegates are local and 49.1% of corporate delegates are non-local and 77.8% of government delegates are local and 22.2% of government delegates are non-local. This suggests that visitor attractions are not large generators of revenue (in terms of number of bed nights) for the local community as the minority of delegates are non–local.

To summarise the findings, it can be seen that for all delegate types hotels attract non-local delegates, this is likely to be the result of hotels not only offering conference facilities but also overnight accommodation within a single venue. This compares with purpose-built venues which attract local delegates across all delegate types. Purpose-built venues rarely offer accommodation on the same site, however, purpose-built venues rely on delegates booking accommodation in neighbouring hotels. This is also the case for visitor attractions as few offer onsite accommodation. For educational establishments there is a combination of local and non-local delegates. With associations favouring non-local locations, due to the size and scale of the conference, in comparison to smaller corporate and government which prefer local establishments. To conclude, it is important for conference venues to consider attracting conferences that are attended by non- local delegates, as they will require accommodation, along with additional facilities once the conference has been completed such as retail and entertainment facilities. By doing so the opportunity for the local community to generate revenue from delegates staying overnight is far greater than local delegates attending a one day meeting then returning to their homes.

7.3.18 – Conference delegates / non-delegates within the hotel classification

The final section of this hypothesis examines the differences between conference delegate and the non-delegates. Section 1.10 states "this research shall use the term 'delegate' to identify those attending conferences and 'non-delegate' to describe all other hotel guests spending at least one night in a hotel. Section three of the hotel questionnaire examined the general characteristics of non-delegates that stay at hotels and offers some comparisons with conference delegates. No means of differentiating between delegates and non-delegates was provided within the questionnaire, and thus it was deemed that individual hotels were able to differentiate between these two grouping in response to the following questions. The following section aims to identify the differences and similarities of the hotel facilities demanded by the conference delegates and non-delegates. The importance of these findings is offer advice to other hotels who wish to diversify their facilities and attract conference delegates.

7.3.18.1 – Room type booked by conference delegates and non-delegates

Cross-tabulations examining the type of overnight accommodation demanded by conference delegates and non-delegates can be seen in Figure 7.11.

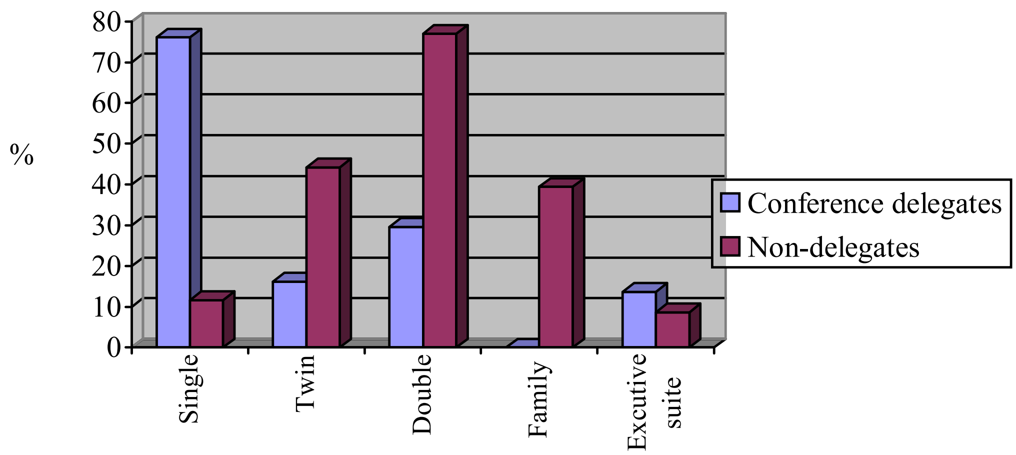


Figure 7.11 – Room type booked by conference delegates and non-delegates
(N=277 for conference delegates; N=276 for non-delegates)

In both cases, more than one response was permitted. It can clearly be seen that conference delegates and non-delegates demand differing accommodation types. Delegates demand single rooms, with over three-quarters of responding hotels (211 hotels or 76.1%) stating this is the case. After single rooms, 82 (29.6%) hotels stated that delegates demanded double rooms. More than one answer could be supplied, the most popular combination of accommodation types cited by hotels is clearly single and double rooms.

Comparing this to non-delegates it can be seen from Figure 7.11 that a greater variety of rooms are demanded. The most popular accommodation type is that of a double room, cited by 215 (77.6%) hotels. The second most popular room type is that of a twin room, with 122 (44.2%) respondents stating this. Hotels citing a family room as the most popular closely follow this, with 109 (39.4%) venues. The most popular combination of rooms demanded by non-delegates and cited by hotels is double and family rooms. This clearly highlights that a differing product is required for conference delegates and non-delegates, i.e. single rooms for conference delegates and double/twin for non-delegates. This should be taken into consideration when designing / diversifying into a conference product.

7.3.18.2 – Duration of stay by conference delegates and non-delegates

Extending from the type of accommodation demanded is the length of stay for both conference delegates and non-delegates. The cross-tabulated results can be seen in Figure 7.12. Again, as with the type of accommodation demanded by conference delegates, one category dominates the results. In 235, (86.7%) hotels conference delegates stay a single night.

This is consistent with the length of conferences, as the majority are less than two days, and supports the findings in Section 7.3.17.2 which identified that within hotels association, corporate and government stay on average 1.6, 1.8 and 1.5 days respectively thus requiring only one nights accommodation. This promotes a high turn-around in accommodation facilities for bookings of single rooms required by conference delegates for only one night, thus hotel staff will need to be able to manage this turn around quickly.

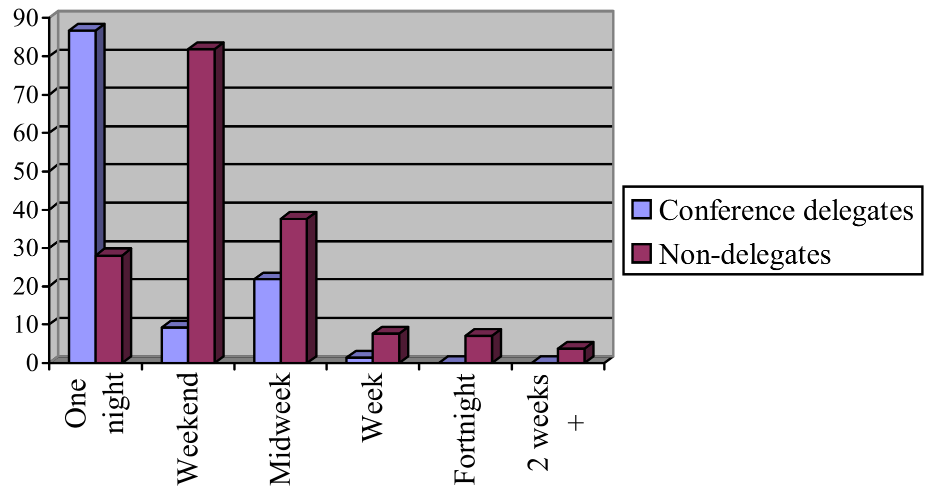


Figure 7.12 – Duration of stay for conference delegates and non-delegates (N=277 for conference delegates; N=276 for non-delegates)

The next most popular response for conference delegates is mid-week. This was cited by 59 (21.8%) hotels. Indeed the most common combination of durations for delegates was one night / mid-week. Non-delegates stay for a range of duration's. The most popular being that of a weekend (222 hotels or 81.9%), followed by mid-week (102 hotels or 37.6%) and then one night (76 hotels or 28%). Where hotels stated a combination of durations for non-delegate the most popular combination was weekend / mid week. Hotels catering predominantly for non-delegates have less of a turn around of customers, as the non-delegates stay longer from weekends or mid-week breaks, which will reduce the workload of the hotel staff. By introducing conference tourism to a hotel it will create greater demand for the facilities during the weekdays, whereas the non-delegates create demand predominantly during the weekends. Thus the hotel occupancy may be constant throughout the week.

7.3.18.3 – Board basis booked by conference delegates and non-delegates

Respondents were then questioned about the board basis demanded by delegates and non-delegates. The cross-tabulated results can be seen is Figure 7.13. More than one response was permitted.

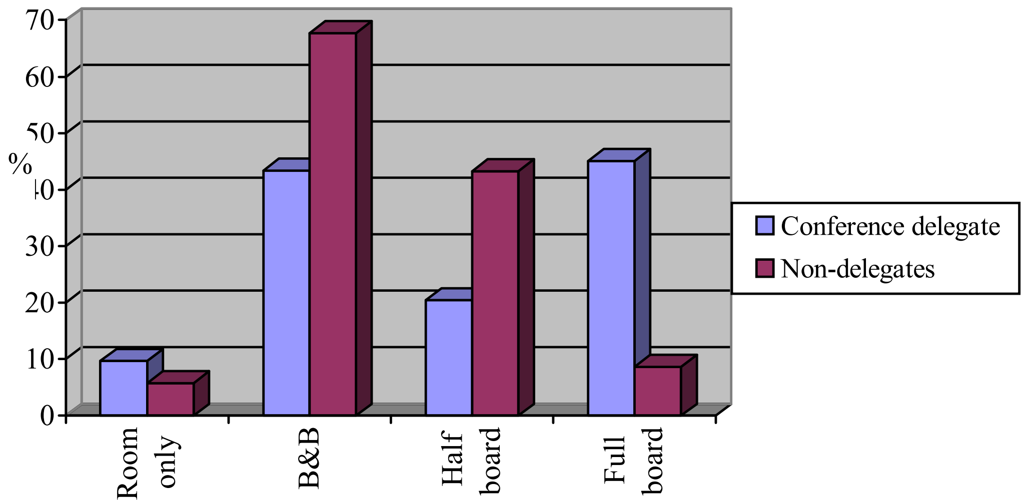


Figure 7.13 – Type of accommodation and food usually booked by conference delegates and non-delegates
(N=277 for conference delegates; N=276 for non-delegates)

Two categories dominate the responses concerning conference delegates. Full board is the most common response, with 125 (45.1%) hotels responding, this is closely followed by bed & breakfast with 121 (43.1%) responses. Non-delegates first preference is bed and breakfast accommodation, with 187 (67.7%) hotels responding. Unlike delegates, non-delegates prefer half board accommodation, which has the second highest response rate for non-delegates at 120 (43.4%) hotels. Providing accommodation on a full board basis will generate greater revenue for the hotel, when compared to bed & breakfast basis for non-delegates.

7.3.18.4 – Room rates charged for conference delegates and non-delegate

The following questions asked respondents the usual price charged by the hotel for full rack rate, normal rate and discounted rate. Where the full rack rate is defined as "published full price for which hotel rooms are sold" (Hotel About.com, 2005 online). The normal rate is the most common rate charged which is below the full rack rate, and the discounted rate is the lowest room rate charged by the hotel. Finally, a variable room rate means that the rate at which a room is charged to delegates and non-delegates changes and is not set. In this instance delegates from different conferences are charged different rates, and also non-delegates are charged differing rates. This information can be seen in Table 7.57.

Table 7.57 – Room rates charged for conference delegates and non-delegate

Rate offer	Number of Non-delegates	%	Number of Conference Delegate	%
Full Rack Rate	85	29.7	82	28.7
Normal	67	23.4	68	23.8
Discounted	100	35	75	26.2
Variable rates	34	11.9	30	10.5
Total (N=)	286	100.0	286	100.0

For conference delegates the largest number of respondents charged conference delegates the full rack rate, with 82 (28.7%) hotels doing so. This compares to non-delegates who most hotels charged discounted rates, with 100 (35%) of establishments doing so. This suggests that where accommodation is paid for as part of a conference package, hotels may charge the full rack rate. However, where the individual is paying they are more likely to get a discounted rate for accommodation, although 85 (29.7%) respondents do charge non-delegates the full rack rate. Financial data concerning the charges made to delegates and non-delegates can be seen in Table 7.58.

The average full rack rate, which a non-delegate would pay for night is £110.62, this compares to £123.35 for conference delegates. This research identifies that conference delegates pay on average an extra 11.5% more on the full rack rate compared to non-delegates. This is also seen in the standard rate payable per night. Non-delegates pay on average £87.90, whereas conference delegates pay £106.40. This equates to conference delegates paying on average 21% more per night for accommodation. When the discounted rate is examined, it is seen that non-delegates pay £70.96 per night, compared to £97.50 for conference delegates, again this equates to conference delegates paying an extra 37.4% for the discounted room rate per night.

Table 7.58 – Usual price a non-delegate or a conference delegate pays for accommodation

(£) unless stated	Minimum	Maximum	Mean	Mode	Median	Standard Deviation	N=
Full rack rate / non delegate	30.00	360.00	110.62	60.00	95.00	63.85	257
Full rack rate / delegate	40.00	325.00	123.35	110.00	110.00	55.67	263
Normal rate / non delegate	21.50	360.00	87.90	55.00	75.70	53.13	245
Normal rate / delegate	30.00	325.00	106.45	95.00	95.00	47.05	247
Discounted rate / non delegate	18.00	220.00	70.39	50.00	60.00	39.66	251
Discounted rate / delegate	22.00	268.00	96.63	90.00	87.50	47.50	253
% Discount / non delegate	0	80.00	20.75	10.00	16.50	15.76	253
% Discount / delegates	0	75.00	15.35	10.00	10.00	10.95	253
Average cost per night / non delegate	25.00	360.00	81.28	50.00	70.00	53.76	261
Average cost per night / delegates	25.00	325.00	100.13	65.00	90.00	45.63	260

The value of the standard deviation is high for these results discussed, ranging from 36.99 for the discounted rate offered to non-delegates to that of 63.85 for the rack rate offered to non-delegates. These high standard deviation values suggest that there is a wide distribution around the mean value and the mean may not be representative of the sample as a whole. On average hoteliers give non-delegate a 20.75% discount from the full cost of a night's accommodation, in comparison, a 15.35% discount is given to conference delegates. Although hotels have a variety of rates (full rack rate, standard and discounted) at which accommodation can be charged, the actual rate will depend upon seasonality and demand. Therefore, respondents were asked for the average rate for which they charge for one night's accommodation. For non-delegate the average rate charged is £81.28, compared to £100.13 for conference delegates, again this equates to conference delegates paying an extra 23.2%. Overall this research identifies that conference delegate pay more for a room compared to non-delegate rates. Conference tourism therefore creates demand for smaller single occupancy rooms, staying for single nights thus additionally creating a higher room turnover rate and higher rates are often charged for conference delegates, in comparison to non-delegate guests.

7.3.18.5 – Typical use of hotel services by delegates and non-delegates

The services used by delegates and non-delegates have been cross tabulated, and can be seen in Figure 7.14

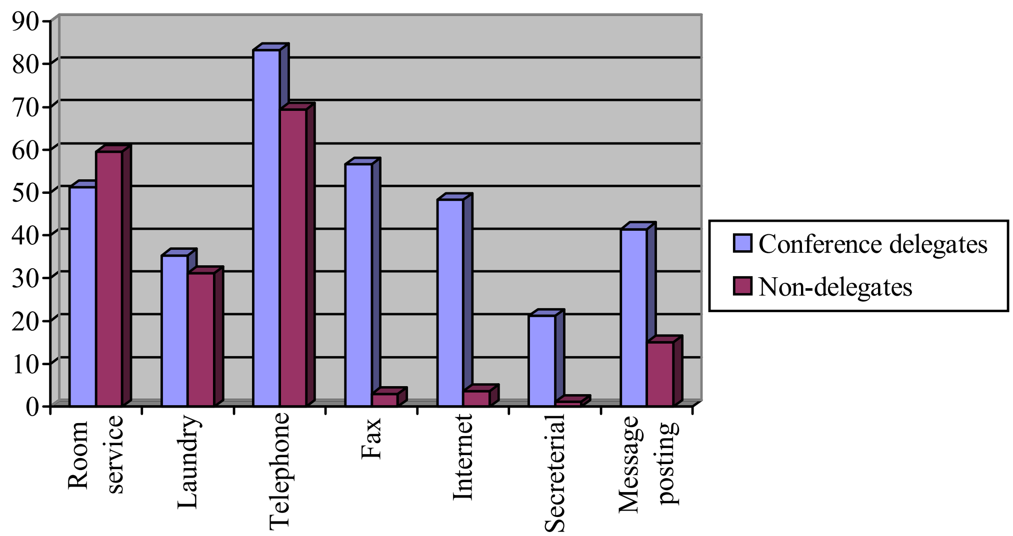


Figure 7.14– Typical use of hotel services by conference delegates and non-delegates (N=277 for conference delegates; N=272 for non-delegates)

It is clear that conference delegates use the majority of services offered to them, in comparison to non-delegates. Respondents stated that non-delegates predominantly use telephone and room service, 189 (69.4%) and 162 (59.5%) responses respectively. Only 85 (31.2%) respondents stated that non-delegate used the hotel laundry service, 41 (15.0%) respondents highlighted that non-delegates used message posting. Non-delegates rarely used facilities such as a fax machine, Internet and secretarial work, such as typing of letters, with eight (2.9%), ten (3.6%) and three (1.1%) venues stating this was the case respectively. The main service used by the conference delegate is the telephone, with 231 (83.3%) responses. A fax service, room service, computer and internet facilities, message posting and laundry were used by, 157 (56.6%), 142 (51.2%), 134 (48.3%), 115 (41.5%) and 98 (35.3%)

conference delegates respectively, the least used service was of secretarial work, where only 59 (21.2%) responded.

The vast majority (250 respondents or 91.9%) of hotel respondents stated non-delegate typically use three or less services offered by the hotel, whereas 147 (53%) of conference delegates typically use three or less services offered by the hotel. Additionally, 21 (8.1%) non-delegate typically use four or more services, while 129 (47%) conference delegates typically use four or more services. This suggests that hotels do not financially benefit from non-delegate using other services available. In comparison the conference delegate uses many extra facilities offered by the hotel, such as laundry and secretarial services that the delegate is charged for, thus generating even greater revenue from the conference delegate in comparison to the non-delegate.

For non-delegates, 106 (39%) respondents stated that their non-delegates use one service, 20 or 7.35% of non-delegates do not use any of the facilities. Only 63 (23.2%) of the respondents stated that non-delegates use four or more services. A further 147 (53.2%) respondents stated that their conference delegates use three or less services. 65 (23.5%) respondents stated that their delegates use only one service and only two (0.72%) respondents stated that their delegates use none of the services. 129 or 46.7% respondents stated that conference delegates use four or more services provided by the hotel. Moreover, 45 or 16.3% of delegates use six or more services during their stay at the hotel.

7.3.19 – A summary of venue classifications

The preceding sections of this chapter have identified the differences and similarities within the four venue classifications, in response to Objective One. A summary of the four venue classifications are provided below and a complete list of characteristic can be seen in Appendix D, Table 7.59, (refer to page 482).

7.3.19.1 – Distinct characteristics of purpose-built venues

In summary, purpose-built venues are characterised by a dominance of multi-purpose venues, ownership being split between public and private and no one ownership type dominates. They are characterised by offering the largest conference venue capacities, although such venues have the lowest average number of bedrooms per venue, thus they are reliant upon the local hotel stock. It is only purpose-built residential venues that offer overnight accommodation within this venue classification, which commonly have e-mail facilities within their accommodation.
The conference venue facilities for purpose-built venues include the ability to create a blackout environment within the conference room, good acoustics and the availability of separate coffee break areas are common. Many purpose-built venues do not have natural light within their conference facilities. This venue classification offers delegates a good range of conference products including translation services, although recreational activities are not common. Indeed the lowest level of provision for social programmes, a tour of venue, health facilities and beauty salons are exhibited by purpose-built venues. Catering services used are standard across the conference sector, that of in-house facilities. Purpose-built venues consider the most important conference services provided is that of a high level of service and customer-oriented staff, a wide range of meeting capacities and that the venue has excellent communication links providing easy access. Purpose-built venues are characterised as receiving some grants or subsidies. The source of this funding is in the majority from local government. Respondents stated that they were highly dependent upon such funding for their continued functioning

Over three-quarters of responding purpose-built venues stated that they received bookings direct from conference organisers, rather than through a third party. Performances and entertainment events are the most held activity at purpose-built venues, although they experiencing negative growth rate. Greatest growth is seen in conference and business meetings for purpose-built venues. The average purpose-built venue is characterised by employing 106 full-time employees and 72 employees on a part-time basis. Employees have an average length of service of five years. Purpose-built venues exhibit the lowest levels of average profit, however, purpose-built venues are characterised by the highest levels of delegate spending across the three delegate types (association, corporate & government). They are also characterised by a high to medium level of delegate numbers. Indeed purpose-built venues account for two of the three highest delegate numbers by delegate type. The average length of stay is relatively short and delegates are likely to be local.

7.3.19.2 – Distinct characteristics of hotel venues

No single venue type dominates hotel venue classification, with both chain-owned and independent hotels being present. However, high levels of private ownership are common and there is no public ownership of venues. No hotel received a grant or subsidy. Hotels are characterised as offering the smallest conference and banqueting rooms, although such venues have an above average number of bedrooms per venue. Concerning hotel bedroom facilities, a desk, telephones, satellite television, mini-bar and fax facilities have a high level of provision.

This research identifies that of the 286 respondents, 257 (89.9%) hotels had some form of hotel quality rating, with the AA and RAC accreditation most common. Chained-owned hotels are more likely to be four star or five star, whereas independently owned hotels are more likely to be two star or three star.

Air conditioning and temperature control are common throughout conference facilities offered by hotels, as are comfortable seating and soundproofing. The lowest level of provision throughout the four venue classifications is seen in the hotel classification for the ability to obtain blackout, also the conference rooms do not have good acoustics and the existence of a tiered amphitheatre is not common within hotels. Products that are widely available are basic equipment, although the lowest level of provision within the conference sector for technical support and the existence of a conference bureau are also seen within hotels. Recreational activities are common, with social programmes, leisure activities and banquets / receptions being offered and/or catered for. In-house catering facilities are predominant. Overall, hotels offer a high standard of overnight accommodation and good recreational activities, however, in many cases their conference facilities are limited.

Hotels consider the most important conference services provided to be that of a high level of service and customer-oriented staff, a wide range of meeting capacities and that the venue offers in-house accommodation. The majority of hotels receive booking directly, rather than through a third party. Hotels are favoured for banquets, functions and receptions. This venue classification is also experiencing the greatest level of growth for this activity. Hotels employ the lowest number of employees who work specifically in conference roles, with the average length of service for employees being the shortest for all four venue classifications, at less then three years

Respondents were asked the average number of delegates per event held at hotel conference venues. The average number of association delegates was 57.3, for corporate delegates 61.4 and for government delegates 32. Hotels have lowest levels of delegate numbers for association and government delegate types when compared to the British Conference Market Trends Survey (1999) sector average. Across the four venue categories hotels have the lowest average number of delegates for association and government conferences. For hotels, association delegates stay 1.6 days, corporate delegates stay 1.8 days and government delegates 1.5 days on average. These results are slightly higher than those for purpose-built venues, as hotel conference facilities offer their delegates a conference package including accommodation. The results show that the average length of stay is just over 1.5 days, suggesting that the majority of delegates stay one night during their conference. Delegates who stay at hotels have a medium level of expenditure, less than delegates staying at purpose-built venues, but higher than educational establishments and visitor attractions. These delegates are likely to be non-local to the host destination.

Table 7.60 in Appendix D (refer to page 483) shows a comparison between conference delegates and non-delegates within the hotel classification. Conference delegates prefer single rooms, for a single night staying on a full board basis. Non-delegates book double rooms, staying longer, particularly at weekends on a bed and breakfast basis. For conference delegates the largest numbers of respondents are charged the full rack rate, while non-delegates are charged discounted rates. The average full rack rate, which a non-delegate would pay is £110.62 per night, this compares to £123.35 for conference delegates, which is an extra 11.5% more compared to non-delegates. This is also seen in the standard rate payable per night.

Non-delegates pay on average £87.90, whereas conference delegates pay £106.40. This equates to conference delegates paying on average 21% more per night for accommodation. When the discounted rate is examined, it is seen that non-delegates pay £70.96, compared to £97.50 for conference delegates, again this equates to conference delegates paying an extra 37.4% for the discounted room rate per night. On average hoteliers give non-delegate a 20.75% discount from the full cost of a night's accommodation, in comparison, a 15.35% discount is given to conference delegates. The average charge for one night's accommodation for non-delegate is £81.28, compared to £100.13 for conference delegates, again this equates to conference delegates paying an extra 23.2% per night.

7.3.19.3 – Distinct characteristics of educational establishments venues

Educational establishments are dominated by universities and are predominantly public owned, although none receive any grants or subsidies for their conference facilities. Educational establishments are characterised as offering the largest total floor space for conference venues and for having the highest average number of bedrooms per venue. However, bedroom facilities are often basic, with desks being commonplace, although telephones, satellite television, e-mail, fax facilities and mini-bars are not commonly provided.

However, the conference product offered by educational establishments is of a high standard, with natural lighting, quiet environments and tiered amphitheatres common. Such venues are characterised by the provision of a wide range of products, the highest levels of provision for basic equipment, audio-visual equipment, technical support, translation services, video-conferencing and conference bureaus are seen within this venue classification. Recreational activities are common, with bars, beauty salons and health facilities commonplace. In-house catering facilities are predominant. The most important conference services provided by educational establishments is that of a high level of service and customer-oriented staff, a wide range of meeting capacities and a conference bureau service is provided. The majority of conferences are booked directly with the venue. The highest number of conferences and business meeting take place at educational establishments, although this venue classification is increasingly hosting trade shows and exhibitions. These results show that educational establishments' conference facilities employ few full time staff and many employ large numbers of part-time staff, in the case of a large conference or event. Their average length of service is less than five years.

For corporate delegate's, educational establishments have the lowest average number of delegates across all four venue classifications. Educational establishments have the longest average duration of stay for all delegate types. However, during their stay corporate delegates spend the least at such venues. Both corporate and government delegates are likely to be local, whereas association delegates are more likely to be non-local.

7.3.19.4 – Distinct characteristics of visitor attractions venue

Visitor attractions are not dominated by one venue type. Indeed it is this venue classification that the greatest level of diversity can be seen. The two most popular types are sports and leisure centres as well as museums and galleries with private ownership dominating. Visitor attractions are characterised as offering medium size conference facilities and an average number of bedrooms per venue. Concerning bedroom facilities, only desks are commonplace as they lack all other facilities that were questioned.

Additionally, visitor attraction conference facilities have the lowest levels of provision across the four classifications for air conditioning, temperature controls, comfortable chairs, sound proofing, separate coffee break areas and quiet environments. Such venues are also characterised by low levels of provision for basic equipment, audio-visual equipment, translation services and video-conferencing. Recreational activities are common, particularly tours of the attraction and corporate games. Catering services use in-house facilities. The most important conference services provided by visitor attractions are a high level of service and customer-oriented staff and the venue has a unique experience. The majority of visitor attractions receive booking directly, with trade shows and exhibitions being the most common event at such venues, although performances and entertainment events are experience growth at this venue classification. On average, visitor attractions have 11 full-time employees and 13 part-time employees directly employed for conference duties, with the average length of service at fewer than four years.

This research also identifies that approximately double the numbers of corporate and government delegates that attend conferences at visitor attractions in comparison to educational establishments. Although for all delegate types this venue classification has the shortest conference duration and delegates are more likely to be local. Both association and government delegates spend the least across all four venue classifications whilst staying at visitor attractions. Overall visitor attractions have low levels of provision for accommodation, conference facilities and products. However, they promote themselves on the uniqueness of their venue, which provide ample opportunity for recreational and corporate activities.

This research therefore rejects Hypothesis One, that current classifications of conference venues are an appropriate way to segment venue supply and forwards one typology with four classifications that are more appropriate of the U.K. conference sector at the start of the 21st century. Objective One, to identify the characteristics of the four venue classifications used to categorise the U.K. conference sector has also been satisfied.

7.4 – Hypothesis Two: Purpose-built venues were responsible for the most significant growth in the U.K. conference sector

Hypothesis Two aims to identify whether one of the four venue classifications, namely purpose-built venues were indeed the first to establish and provided the main growth within the U.K. conference sector and in doing do also satisfy the second objective of this research. Proving or disproving the hypothesis shall be achieved by identifying the decade in which venues were constructed and when, subsequently conference facilities were added and opened during the post-war decades.

Although capacity/occupancy rates would provide a greater insight into the growth rates within the four classifications, it was deemed unacceptable to request capacity/occupancy rates from respondents for time periods as far back as the 1950s. It is therefore accepted by this research that, in principle, a better method of comparing growth exist, however, in terms of accuracy it was deemed acceptable to establish growth through the use of data concerning the decade in which the venue opened and added conference facilities.

With the exception of purpose-built venues, the core business of the other venue classifications did not originally involve offering of conference facilities. It is therefore important to identify the decade in which these venues originally opened and secondly the decade in which they diversified in order to offer conference facilities. Once the decade in which the venues diversified has been established this will be compared to the decades in which purpose-built venues established conference facilities in order to identify whether or not the main growth within the U.K. conference sector has come from purpose-built venues or not.

7.4.1 – The decade in which hotels, educational establishments and visitor attractions opened

Figure 7.14 identifies the decade in which hotels, educational establishments and visitor attractions initially opened their venues without conference facilities, whilst purpose-built venues are seen in this figure for comparative purposes only. Figure 7.14 identifies that hotels, educational establishments and visitor attractions existed prior to the establishment of purpose-built conference venues, which were constructed in the 1950s. Such venues opened in their original form as early as the 18th century, however, none offered conference facilities. The nature of the venue and the decade in which the venue opened is statistically significant to the 0.005 level, which means that a relationship exists between the venue classification and the decade in which the venue opened. The following discussion examines these relationships.

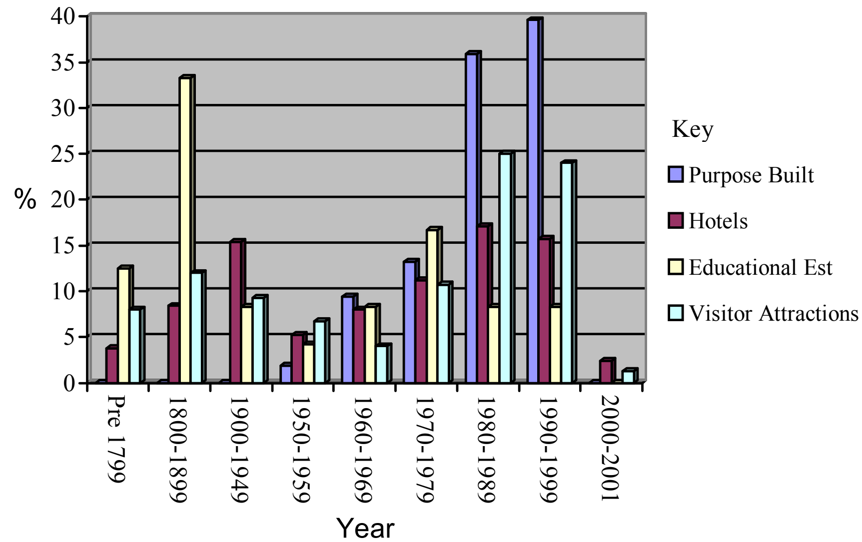


Figure 7.14 – The year in which the venue opened

(Purpose-built N= 53; Hotels N=286; Educational Establishments N= 24; Visitor attractions N=65)

During the 50 years (1900 and 1949), 44 (15.4%) of the responding hotels were built. However, limited growth occurred in the 1960s with 23 (8%) hotels opening. During the 1970s a further 32 (11.2%) hotels were opened and in the 1980s growth occurred with 49 (17.1%) hotels opening. During the 1990s a further 45 (15.7%) were built. The results show that seven (2.4%) hotels were built between January 2000 and August 2001 of the current decade.

Eleven (45.7%) of educational establishments were built before the 19th century. A second period of growth for educational establishments can be identified during the 1960s and 1970s, with two (8.3%) and four (16.7%) educational establishments opening respectively. Growth fell back to the levels experience through the 1960s during both the 1980s and 1990s, with two (8.3%) opening in each decade. No respondents stated their educational establishment opened during 2000 and 2001.

Many visitor attractions were opened prior to the 19th century. Many are based in historical buildings such as castles and museums which date back as early as the 1800s. The 1960s shows the lowest number of attractions in the post-war era opening, with only three (4.6%) responding attractions doing so. Growth occurred during the 1970s with six (9.2%) attractions opening. Significant growth occurred through the

1980s and 1990s with 16 (24.6%) attractions opening in each decade. It can therefore be seen that nearly half of all responding visitor attractions opened in a 20-year period.

7.4.2 – Were conference facilities opened at the same time as the establishment opened?

Respondents were asked whether the venue was opened at the same time as the conference facilities were first offered. This relationship between the nature of the venue and whether conference facilities were initially offered is statistically significant to the 0.001 level. The majority of hotels, educational establishments and visitor attractions stated that their venue was not built and opened at the same time as dedicated conference facilities were initially offered, with 180 (62.9%), 18 (75%) and 54 (72%) responding venues respectively. This research identifies that the three venue classifications primarily opened to satisfy their core markets, that of accommodation, education and leisure respectively, only adding conference facilities at a later date.

7.4.3 – The decade in which the conference facilities were added and opened

Respondents were then asked in which year the venue initially offered conference facilities. This is shown in Figure 7.15. Figure 7.15 shows that in the 1950s, one (1.9%) purpose-built venue was opened, indeed this venue opened in 1950. In the 1960s, this rose to five (9.4%) purpose-built venues opening. During the 1970s seven (13.2%) such venues had opened. By the late 1970s, many U.K. coastal resorts had entered what Butler described as the decline stage of their lifecycle and rejuvenate through strategic planning was required (refer to Section 2.5). This was achieved by identifying new markets that were both geographically and behaviourally segmented, whilst at the same time protecting their traditional tourism markets (Morgan, 1994; Cooper et al, 1998). Such strategies promoted the introduction and growth of conference tourism through the construction of purpose-built conference venues across the country.

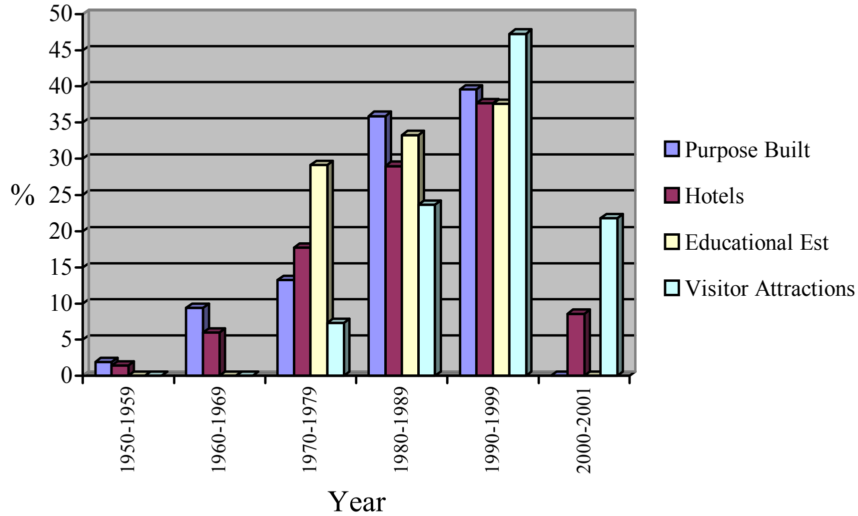


Figure 7.15 – The decade in which conference facilities added & opened.
(Purpose-built N=53; Hotels N=283; Educational Establishments N=24; Visitor Attractions N=75)

Further growth occurred in the 1980s and 1990s, with 19 (35.9%) and 21 (39.6%) venues opening respectively. No respondents stated that their purpose-built venue opened in the years 2000-2001. The results suggest that by the turn of the 21st century, many U.K. cities and large towns had invested in the construction of a purpose-built conference venue. However, The British Association of Conference Destinations (1998) stated that there is a shortage of publicly funded conferences venues in many U.K. cites, for example Bath, Bristol, Eastbourne, Leeds, Manchester and Swindon. Thus there is potential for expansion in the U.K. purpose-built conference venue classification.

For the hotel market, four venues (1.4%) stated they opened their conference facilities in the 1950s. These venues opened in the later half of the decade, between 1955 and 1959. The number of hotels offering conference facilities grew to 17 (6%) in the 1960s. This increases threefold to 51 (17.7%) hotels in the 1970s, which is shown in Figure 7.15. As discussed within the literature review, Section 3.3, the introduction of a purpose-built conference venue has resulted in capital improvements (Nelson, 1996). In particular adjacent hotels improve their facilities in order to supply a higher standard of accommodation as demanded by conference delegates (Lawson, 2000). Grants were made available under the Development of Tourism Act (1969), part II, (refer to Section 4.3.4) for the construction of new hotels, the extension and/or alteration of existing hotels and for the provision of certain fixed equipment. As a result of this funding many hotels had the opportunity to offer conference facilities that complimented and/or competed with those facilities offered by purpose-built venues. New hotels were constructed close to purpose-built conference venues, so that they can "benefit as providers of delegate accommodation" (Rogers 2003, p.47).

These results show that the first responding hotels to offer conference facilities did so some five years after the initial purpose-built venue opened. By the 1970s the growth in the number of hotels offering conference facilities exceeded the growth in purpose-built venues. As growth continued within the purpose-built venues, expansion in hotel conference facilities also occurred, with 83 (29%) hotels adding conference facilities in the 1980s. With almost a third of responding purpose-built venues opening during this decade, the stimulus for hotel to upgrade and offer conference facilities remained strong. Indeed, almost a third of hotels opened conference facilities during this decade.

From the 1980s hotels became a major provider of conference facilities, providing 70% of the meetings space in the U.K. (Shone, 1998) and by the 1990s hotels led the market in terms of supplying conference facilities, accounting for 77% of all conference venues and 68% of all delegates' nights (Travel Industry Monitor, 1991). In the 1990s, the greatest level of growth within the responding hotel venues occurred, with 106 (37.3%) hotels opening. Over the post-war decade's hotels have identified the potential of the conference market as a source of revenue, thus adding conference facilities which are now managed as an integral part of the hotel business (Davidson & Cope, 2003).

With regards to the ratio between the number hotels opening and those adding conference facilities, shows that in the 1950s for every one hotel opening 0.07 hotels would open conference facilities. By the 1960s this had risen to 1:0.7 (for every one hotel opening, 0.7 would add and offer conference facilities. In the 1970s, the ratio was 1:1.59, in the 1980s this rose to 1:1.69 by the 1990s for every one hotel opening 2.35 hotels were adding conference venues. As such over twice as many hotels offering conference facilities opened in the 1990s when compared to hotels without conference facilities.

Educational establishments first offered conference facilities during the 1970s, with seven (29.1%) conference facilities opening. It was in this decade that both purpose-built and hotel markets underwent rapid expansion in the provision of such facilities. Adding to this discussion it can be seen that purpose-built venues were the first to open, preceding the growth in the hotel market, which in turn was subsequently complimented by the opening of conference facilities within educational establishments, these findings support the work of Paine (1993) who identified that in the early 1970s several establishments actively began to market themselves as conference facilities during vacations.

Growth was experienced in the 1980s and 1990s, with eight (33.3%) and nine (37.6%) educational establishments adding conference facilities. The 1980s were a decade associated with considerable investment in upgrading facilities, accompanied by an increase in the level of marketing (Davidson & Cope, 2003). Conferences are now viewed as a significant source of income as a consequence many venues have developed conference facilities. Many have obtained external funding to build residential facilities and to improve the quality of their conference product (Shone, 1998). No respondent stated their establishment opened conference facilities between January 2000 and August 2001.

Although the absolute number of educational establishments opening has reduced, the ‘open:offering’ ratio has risen constantly from the 1970, when it stood at 1.75. In the 1980s this increased to 1:4, with the 1990s for every one educational establishment opening 4.5 such venues added conference facilities. These results show that although there is a slight decline in both the number of establishments opening, the ratio of establishments converting facilities in order to offer a conference package has raised since the 1970s.

This research identifies that educational establishments have entered the conference market approximately one decade after hotels entered the market place. Similar to hotel development, which identified that conference facilities were a means of diversifying from their core product, so, educational establishments have identified conference facilities as a similar means of diversification. In doing so, such establishments are able to utilise existing lecture rooms, auditoria and technical facilities, as identified in the literature review, Section 4.6.

For visitor attractions, the 1970s showed little demand for conference facilities with six (8%) attractions adding such facilities. Of these six venues, five opened in the latter part of the decade, between 1975 and 1979. However, through the 1980s and 1990s there was a rapid rise in the number of conference facilities being added to visitor attraction, with 22 (29.4%) and 35 (46.6%) attractions responding. This expansion occurred one decade after educational establishments entered the conference market. As stated, the survey took place up to August 2001, in which 12 (16%) attractions within the sample population added conference facilities. This is the largest growth rate in this decade for all four venue classifications.

With the absolute number of visitor attractions opening increasing, the 'open:offering' ratio is also rising. In the 1970s for every one visitor attraction opening, one added conference facilities, this rose to 1:1.37 in the 1980s and in the 1990s it stood at 1:2.18. These results show that there is an increase in both the number of attractions opening, an increase in the number of attractions adding conference facilities and the 'open:offering' ratio has also increased since the 1970s.

In response to Hypothesis Two, this research has identified, other than purpose-built venues, the majority of venues view the provision of conference facilities as a secondary activity, i.e. added after the venue was opened for its original purpose. This research has also identified that purpose-built venues, hotels, educational establishments and visitor attractions did not enter the U.K. conference market at the same time. Purpose-built venues established first, followed by hotels offering conference facilities. Educational establishments were the third to enter the U.K. conference market in the 1970s. By the 1980s and 1990s many educational establishments built their own purpose-built facilities. Educational establishments entered the market a decade later than hotels. Visitor attractions are the latest of the four venue classifications to experience significant growth. A limited number of visitor attractions entered the conference market in the 1970s. However, the greatest level of growth has been experienced in the 1990s and in the first years of the current decade.

These results show that it was purpose-built venues that initiated growth within the U.K. conference sector. Hence growth within this venue classification is the most significant in terms of its impact on the subsequent growth of the U.K. conference sector. Thus proving Hypothesis Two to be true. The relationship between the decade in which conference facilities were added and the nature of the venue is statistically significant to the 0.005 level. This research has identified that although purpose-built venues were the originators within the U.K. conference sector and thus their growth was the precursor to growth in the other three venue classifications, each decade within the post-war era has been characterised by differing venue classifications experiencing the greatest levels of growth.

During the 1950s and 1960s purpose-built venues experienced the greatest levels of growth. By the 1970s educational establishments were experiencing the greatest growth within the U.K. conference sector. For the 1980s the greatest level of growth was experienced once more by purpose-built venues, although all venue classifications were experiencing growth rates of between 29% and 35.9%. For the final decade of the 20th century, visitor attractions experienced the greatest level of growth. With purpose-built venues, hotels, educational establishments and visitor attractions entering the conference market at the differing times and differing rates of growth experienced throughout the four venue classifications, each of these venue classifications is currently progressing through their lifecycle at different rates.

This research therefore satisfies Objective Two and accepts the Hypothesis Two, that purpose-built venues were responsible for the most significant growth in the U.K. conference sector, in terms of purpose-built venues being the originators of this U.K. conference sector. However, the other three venue classifications have at one time or another throughout the post-war period experienced greater levels of growth than purpose-built venues.

7.5 – Hypothesis Three: Changes to venue facilities were economically driven

Having identified that the four venues classifications have developed at differing times during the post-war era and with differing growth rates, Hypothesis and Objective Three will identify the reasons for such venue growth, including whether or not venues were economically driven.

7.5.1 – Reasons for entering the conference market

In order to identify the reasons for creating conference facilities, respondents were provided with a list of key reasons for creating and supplying conference facilities, however, no definitions were provided with each reason, and hence terms such as 'perceived demand' and 'in response to market demand' were interpreted by respondents accordingly. The list was drawn from a review of relevant literature which including previously utilised questionnaires from the British Association of Conference Destinations and British Conference Market Trends Survey (1999). Each reason was graded by respondents from one (highly significant in the decision) to five (not significant in the decision). The results for each venue classification can be seen in Appendix D, Tables 7.61 through to 7.64, (refer to pages 484 to 487 inclusive). A summary of the top three reasons for each conference venue classification is seen in Table 7.65.

In response to market demand from conference organisers and secondly perceived demand were the most commonly cited factors for creating and supplying conference facilities. Whereby market demand is the relationship between the established demand for the conference facilities and the price offered, this is often established through market research. This compares to perceived demand, which is simply the apparent demand and the perceptible price that can be charged, which is demand that has yet to be established. For purpose-built venues market demand was ranked first with an average score of 2.7, a modal value of two and a standard deviation of 1.44. Overall, 23 (43.3%) venues stating this factor was either significant or highly significant in their decision to create conference facilities.

Table 7.65 – Top 3 factors for creating / supplying conference facilities

	Purpose-built Venues	Hotels	Educational Establishments	Visitor Attractions
1	**Response to market demand**	<u>Generate an additional revenue source.</u>	<u>Generate an additional revenue source.</u>	<u>Generate an additional revenue source</u>
2	Perceived demand	**Response to market demand**	Aim to attract business in off peak times	Subsidise income for the upkeep of building
3	*Aim to attract business in off peak times*	To attract repeat visitation	**Response to market demand**	Single revenue stream to multiple revenue streams

Perceived demand was ranked second for purpose-built venues, with an average ranking of 2.8, a modal value of two and a standard deviation of 1.35. Perceived demand is significant for purpose-built venues because, as identified in Section 7.4 (Hypothesis Two), they were the initiator of the U.K. conference sector and as such had had limited resources upon which to draw comparison with. With regards to responding to market demand, three of the four conference classifications rank this factor within their top three reasons for creating conference facilities. For hotels, market demand has an average ranking of 1.8, with a modal value of one and a standard deviation of 1.02. Overall 193 (76.2%) responding hotels considered this factor as either significant or highly significant. Similarly, for educational establishments this factor was ranked third, with an average ranking of 2.8, a modal value of three and a standard deviation of 1.19. Overall, 14 (58.3%) venues viewed this factor as significant.

These results show market demand is not ranked as highly for hotels, educational establishments and visitor attractions, as it is for purpose-built venues. Perceived demand is the most important reason for purpose-built venues, as conferences are their primary source of revenue, with an average ranking on 2.8. It is less important to hotels because they have accommodation, with associated food and beverage sales as their primary revenue. It is also less important to both educational establishments and visitor attractions because conference activity is peripheral to their normal business. This research has shown that market and perceived demand are higher for purpose-built venues, but not for the other three venue classifications, suggesting that purpose-built venues have come into existence in order to meet demand.

Hotels, educational establishments and visitor attractions have come into existence in order to generate an additional revenue source. This factor was excluded from the purpose-built venue questionnaire, as conferences are their principle revenue stream. All three remaining conference classifications rank this factor as their primary reason for establishing conference facilities, with an average ranking of 1.3 for hotels, 1.5 for visitor attractions and 2.0 for educational establishments. Additionally, all three venue classifications have a modal ranking of one for this factor and a standard deviation value of 0.82, 1.1 and 1.6 respectively, suggesting that the average value is representative of the overall sample. In terms of the number of respondents citing this factor as highly significant there are 223 (88.1%) hotels, 20 (83.3%) educational establishments and 46 (64.8%) visitor attractions doing so. This clearly shows that the majority of U.K. conference venues established conference facilities in order to generate additional revenue and thus were economically driven, in support of Hypothesis Three.

One of the main reasons why purpose-built and educational establishments have came into existence was in order to attract business during off-peak periods. Purpose-built rank this factor as the third most important factor, with an average ranking of 2.9, a modal ranking of one and a standard deviation of 1.69. In total 13 (24.5%) purpose-built venues ranked this factor as either significant or highly significant. For educational establishments this factor is viewed as the second most popular reason for creating conference facilities, with an average ranking of 2.7, with a modal ranking of one and a standard deviation of 1.51. Overall, six (25%) educational establishments with conference venues cited this factor as significant. Section 3.3 and 3.4 discussed the economic, social and environmental consequences of introducing a conference venue to a destination. Section 3.4 summarised that through the introduction of a conference venue during the decline stage of the destinations lifecycle, a stage which is characterised by declining visitors in a well defined tourist season, conference tourism is able increase the longevity of the revenue generating season for a destination (McCabe et al, 2000; BCTMS, 2002; Business Tourism Partnership, 2003). These findings suggest that both purpose-built and educational establishments have came into existence in order to attract demand during the off-peak periods. This supports the view that both purpose-built and visitor attractions perceive that conference will increase the longevity of their tourism season.

For visitor attractions, economic based factors are also ranked second and third. The factor ranked second is that of 'to subsidise income for the upkeep of the buildings', with an average ranking of 2.5, a modal ranking of one and a standard deviation of 1.56. This again suggests that the average can be considered representative of the sample as a whole. In total 28 (39.4%) venues stated this was the case. The respondents were from historical buildings, which require constant upkeep and expense, or large stadia that are expensive to maintain. To spread the risk from 'single revenue stream to multiple revenue streams' is ranked third for visitor attractions, with a mean value of 2.6, a modal ranking of one and a standard deviation of 1.62. Overall, 29 (41.4%) visitor attractions cited this factor as being significant. Visitor attractions are reliant on the general public as their principle revenue stream. There are a number of reasons visitor attractions may wish to diversify from their core business. For example, an over supply of visitor attractions within the U.K. will necessitate additional revenue stream being identified, one such revenue stream is that of conferences.

For hotels 'to attract repeat visitation' was ranked third. With an average ranking of 2.1, a modal ranking of one and a standard deviation of 1.3. In total 166 (67.5%) respondents stated that attracting repeat visitation was either significant or highly significant for them. It is important for hotels to attract such repeat visitation as they cater for corporate conferences relying heavily upon companies within their catchment area hosting repeat conferences, training days and external meetings within the hotel.

Each of the identified venue classifications have come into existence for differing reasons. In response to Hypothesis Three, purpose-built venues, which were the pioneers within the conference sector came into existence based on both perceived and actual market demand. For the other three venue classifications adding additional revenue was the primary reasons, although other economic based factors were also cited. For hotels this involved attracting repeat business, for educational establishments this involved attracting delegates in off-peak periods. For visitor attractions, all of the top three factors why such venues initially offered conference facilities relate to revenue and thus are economically driven. Having identified the factors for the creation of conference facilities, Objective Three is also concerned with the identification of the mechanisms used to diversify into conference tourism. One such mechanism is that of how venues diversified in order to offer the conference product. It is seen by those outside the sector that offering conference facilities is considered attractive as it is simply utilising empty space (Leask & Hood, 2000).

7.5.2 – Changes required to create conference facilities

Respondents were questioned whether conference facilities were added through the utilisation of unused space, or the conversion of existing rooms. This question was excluded from the purpose-built venue questionnaire as conference facilities were constructed specifically for the use by conferences. The findings suggest that the majority of hotels, educational establishments and visitor attractions have introduced conference facilities through the utilisation of unused space. Of the 211 responding hotels, 118 (55.9%) hotels created conference facilities through the utilisation of unused space. For educational establishments ten (71.4%) of the 14 responding establishments and 41 (60.1%) 68 responding visitor attractions also created conference facilities through the use of unused space. This supports the view of Leask & Hood (2000) as stated above, that the addition of conference facilities is considered attractive as it is simply utilising empty space. Across these venue typologies the majority of respondents did not convert existing rooms in order to provide conference facilities, with 93 (44.1%) hotels, four (28.5%) educational attractions and 26 (38.2%) visitor attractions doing so. Overall the three venue classifications favour the utilisation of unused space over the conversion of existing rooms for the introduction of conference facilities. Respondents were asked if any improvements had been undertaken to create their conference facilities and the results show that for hotels, 175 (68.6%) of the 255 responding venues did refurbish, whilst 13 (54.2%) of the 24 responding educational establishments stated that refurbishments had occurred and 38 (51.3%) of the 74 responding visitor attractions also refurbished. In order to establish the mechanisms used by venues in order to introduce conference facilities, it is important to establish the type of improvements undertaken in order to create the conference facilities. The nature of the improvements undertaken to create conference facilities is now discussed. Figure 7.16 details the cross-tabulated results concerning the six refurbishment activities across the three venue classifications to initially create the conference facilities.

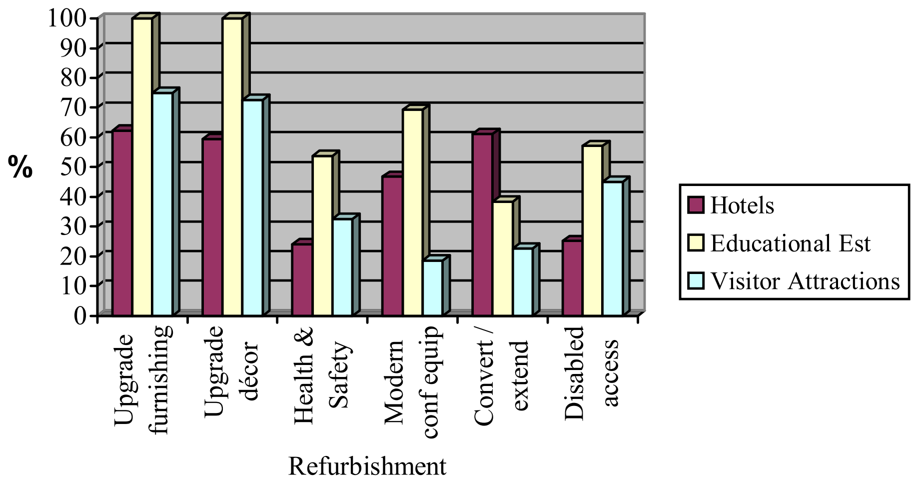


Figure 7.16 – Improvements undertaken to create the conference facility
(Hotels N= 175; Educational Establishments=13 and Visitor Attractions N=38)

Across all three venue classifications each of six refurbishment activities have been implemented, to a varying degree, in order to create their conference facilities. Those activities with the greatest support are those that involve a low level of cost and are easy to implement, such as upgrading furnishings and décor of rooms. The most common type of improvements undertaken by a hotel were to update the existing rooms by improving the standard of furnishings, with 109 (62.3%) hotels doing so. The majority of hotels have also undertaken structural changes by converting and/or extending existing facilities to provide more meeting or breakout rooms and have improved the décor of rooms, with 107 (61.1%) and 104 (59.4%) venues responding respectively. All of these three activities aim to improve the aesthetics of the venue. The results show that 82 (46.8%) hotels installed modern conference equipment, while few hotels improved their disabled access or improved their facilities to comply with health and safety regulations, with 44 (25.1%) and 42 (24%) respectively. This is due to the fact that hotels primary activity is providing accommodation. Therefore health and safety along with the provision of disabled access have already been catered for and implemented. The majority of hotels undertook up to three such activities in order to establish their conference facilities, with 113 (64.9%) venues doing so.

All educational establishments update the furniture and décor of rooms. Section 5.6 highlights the importance of updating educational establishment accommodation facilities to the standard of a three star hotel (Seekings, 1996). In many cases refurbishment of the student accommodation is therefore required before the venues can offer its facilities to conference delegates. Overall, nine (69.2%) educational establishments installed modern conference equipment. Modern conference equipment can be utilised for both the educational establishments primary activity, that of teaching as well as conference delegates. This was followed by those establishments providing disabled access and complying with health and safety regulations, with eight (57.1%) and seven (53.8%) respectively. The proportion of respondents implementing these factors is double that of the hotels. A third of all responding educational establishments undertook four improvement activities in order to establish the conference facilities, while four (30.9%) respondents stated they had to undertake all six of the listed activities. A greater effort is clearly being made to create conference facilities at educational establishments.

For visitor attractions the most common type of improvement was to update the furniture and décor of rooms, with 30 (75%) and 29 (72.5%) venues responding respectively. The third most common response was that of providing disabled access to the premises, with 18 (45%) venues responding. Health and safety improvements were cited by 13 (32.5%) venues which suggest that some venues still require work to be undertaken in order to achieve and/or maintain compliance with current or impending health and safety legislation. This may be more prevalent to visitor attractions as many of the venues are of historical origin and therefore were built before health and safety or disabled regulations were introduced. The number of concurrent refurbishment activities was also established with 60% of venues undertaking up to three refurbishment activities in order to create the conference facilities.

With regards to the venue classifications, all six factors are statistically significant, with the strongest relationship being that of disabled access which is significant to the 0.001 level. There are two further factors which are statistically significant to the 0.005 level, that of updating the furniture and décor of rooms. Both health & safety and installing modern conference equipment are both statistically significant to the 0.05 level.

This research has identified that the venue classification undertaking the greatest number of improvements in order to create conference facilities is that of educational establishments. This is closely followed by visitor attractions, with hotels undertaking the least changes. With regards to the mechanism for initially offering conference facilities, all three venue classifications employed the relatively lower cost activities and easy to implement activities of improving both furnishings and décor. Additionally, the provision of disabled access to comply with health and safety and the installation of modern conference equipment is also undertaken to a lesser extent. Activities which require greater financial outlay and a longer implementation time, such as structural changes, including extending the venue, were the least likely activities to be undertaken in order to create conference facilities.

7.5.3 – The refurbishment of purpose-built conference venues since opening

As discussed in Section 5.6 the refurbishment of conference facilities is a tool to rejuvenate the venues conference product to maintain its position within Butler's (1980) lifecycle. As purpose-built venues were the pioneering conference venue classification many of which are now approximately 30 years old. It is therefore important to modernise the existing facilities to remain competitive in today's market place (Chetwynd, 2001). In fact, 39 (73.6%) of the 53 responding purpose-built venues had undertaken some form of refurbishment since opening, suggesting that such venues had attempted to prolong their product lifecycle, including the initiation of a new lifecycle through rejuvenation. The factors implemented to improve the facilities can be seen in Figure 7.17.

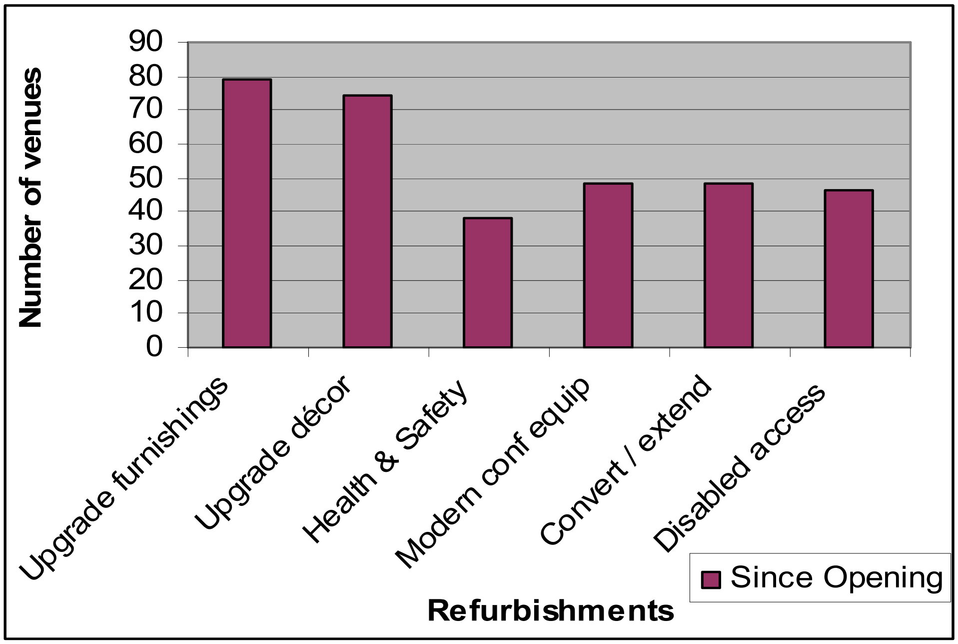


Figure 7.17– Key factors implemented to improve purpose-built venues; since opening

As purpose-built venues were specifically constructed in order to supply conference facilities, no improvements or refurbishments were undertaken to create such facilities, as such discussion is limited to improvements since opening. Upgrading furnishings were the most popular factor undertaken since opening, with 31 (79.4%) venues doing so. The second most popular activity since opening is that of upgrading the décor of the conference facilities, with 29 (74.3%) venues stating they had done so.

These finding support the view of Lawson (2000) who stated that the quality of the interior in terms of comfort, warmth, colour, furniture and general fixtures and fittings should be kept in mind when refurbishing of general fixtures and fittings. Additionally, as Section 5.6 identified, as demand for service quality within the U.K. conference sector rises, so venues have undertaken refurbishments to continually meet the needs of the conference organiser and delegates. Chetwynd (2001, p.41) supports this view by stating “it is important that venues upgrade and keep in tune with what the market is looking for”. Purpose-built venues are viewed as being “contemporary in terms of design, layout, colour schemes and fixtures and fittings” (McCabe et al, 2000 p.78). The earlier purpose-built venues are now viewed as being outdated, as styles and fashions have changed over the subsequent decades. Consequently, they require the décor and furnishings to be modernised to improve the aesthetic appearance of the venue.

Similar levels of implementation have been experienced by three factors, namely installing modern conference equipment, converting and/or extending conference facilities and the provision of disabled access. All were implemented by approximately 25 (47%) venues. The reason why venues undertake structural changes, such as the extension of the venue is due to the high financial costs of constructing a purpose-built venue, as well as the high costs of debt repayments, many purpose-built venues are constructed in two or three phases (Lawson, 2000). It is therefore common for structural changes to include the addition of an extension to the original building. Additionally, there is evidence that the nature of conferences has changed. Initially, purpose-built venues were built to hold large conferences in a single auditorium, refer to Section 7.3.3. This supports the view of Foster (1994), Lawson (1996) and Shallcross (1998) that the primary differentiating characteristic between this venue classification and the other venue classifications is the extensive space provided to cater for conferences where delegate number may run to several thousands. However, conferences now demand numerous smaller breakout rooms, "Delegates spend less time in plenary sessions in the main auditorium and much more time in smaller groups and syndicates" (Rogers, 2003 p.249). The concept that large numbers of delegates gathering together in a single room for eight hours is therefore outdated. Delegates now demand breakout and syndicate rooms. "More and more venues therefore have to provide up to 20 such rooms for training and interactive discussions" (Campbell, 2000 in Rogers, 2003 p.250).

With regards to improving disabled access, Section 5.6.1 stated that compliance with the Disability Discrimination Act (1995) will result in purpose-built venues and all other venues improving their disabled access. The factor that received the lowest level of undertaking since opening was that of undertaking development in order to complying with health and safety regulations, with 15 (38.4%) venues doing so since opening. These figures suggest that many purpose-built venues are already compliant with health and safety regulations. However, there remain over a third of respondents still aiming to comply with such regulations. It can be assumed that for a purpose-built venue to gain planning permission to build the venue initially, such plans must be compliant with both health and safety regulations and legislation relating to the provision of facilities for disabled delegates, at the time of building. However, such regulations and legislation have changed over time and remedial development is often undertaken to maintain compliance.

7.5.4 – The development of hotel conference venues since opening

Hotels have also experienced investment to attract both new and repeat visitation (Richards & Richards, 1994). Since opening, 160 (62.4%) hotels had undertaken some form of refurbishment, suggesting that hotels had attempted to prolong their conference product lifecycle, including the initiation of a new lifecycle through rejuvenation. However, 97 (37.6%) hotels had not invested in changes to their conference facilities. It should be noted that of these 97 venues, many have been constructed recently and therefore do not currently require improvements. For example, 72 hotels were built during the 1990s and 19 hotels were built during 2000 and 2001, giving 91 (35.4%) hotels that are less than 12 years old. Of the hotels that refurbished in order to offer conference facilities, almost three-quarters (70.6%) subsequently refurbished since opening. The levels of development to create conference facilities and since the opening of such facilities can be seen in Figure 7.18

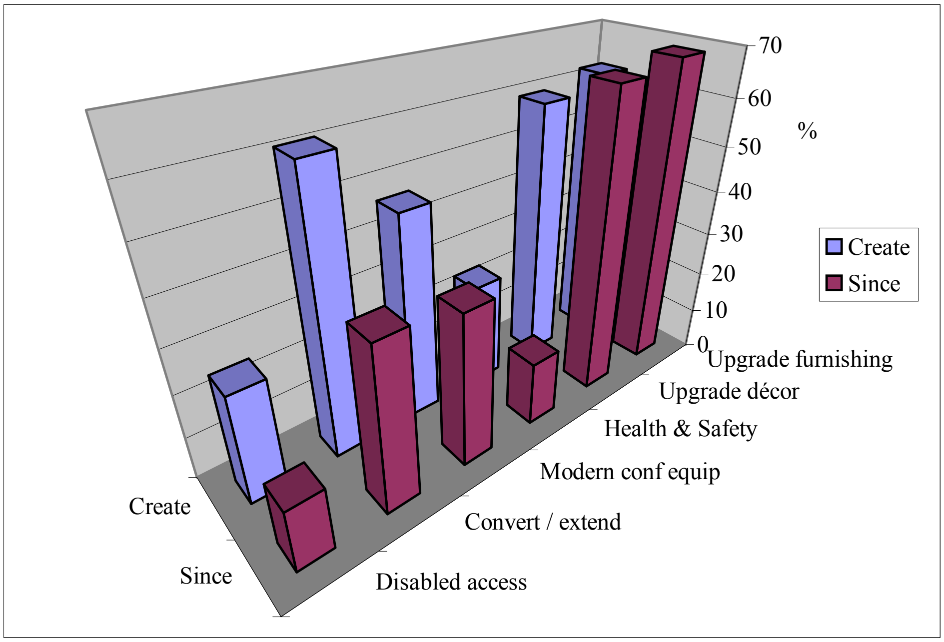


Figure 7.18 – Key factors implemented to create and improve hotel conference venues since opening
(N=160)

Although discussion concerning the activities to create conference facilities has been undertaken, analysis is reproduced in Figure 7.18 for comparative purposes. When examining the factors that explain the development of hotels since opening, the number of hotels implementing structural changes in the form of converting or extending the hotel almost halves to 60 (37.5%), whilst updating furnishings and décor increases to 110 (68.7%) and 107 (66.8%) respectively. The same applies for providing disabled facilities, progressively fewer hotels aim to improve disabled facilities in the near future, with 23 (14.3%) undertaking this work since opening. However, all venues must comply with any legislation that is introduced, such as the Disabilities Act (1995). Health and safety compliance received a low level of implementation 24 (15%) since opening, in the future. Indeed of all four venue classifications, hotels had the greatest level of future plans to undertake work in order to complying with health and safety issues.

Hotels have invested in purchasing modern conference equipment, with 130 (46%) doing so to create the conference facilities, 74 (35%) since the conference facilities were opened. Due to the initial cost of conference technology, most hotels outsource the facility so that they do not have to maintain equipment, (Chetwynd, 2001) and hence minimise costs. Additionally, technical facilities will only benefit the conference delegate, whereas the investment in décor and furnishings will also benefit all visitors to the hotel. Overall the factors that explain the development of hotels are more likely to invest in facilities that will benefit all visitors to the hotels rather than just the conference delegate.

It can be seen that for the majority of responding hotels the initial work to offer conference facilities involved greater effort and expense in the form of structural changes. However, once conference facilities are offered less structural changes are implemented, instead hotels focus on the aesthetics of the venue. This suggests that their second phase of conference development was predominantly cosmetic.

7.5.5 – The development of educational establishment conference venues since opening

In recent years, educational establishments have developed in order to create competitive conference venues, with establishments heavily investing to appeal to conference buyers (Doyle, 2001). A total of 15 (62.5%) educational establishments have invested in improvements since opening whereas nine (37.5%) have not improved their facilities, suggesting that the majority of such venues had attempted to prolong their product lifecycle, including the initiation of a new lifecycle through rejuvenation. The level of responses for each of the six refurbishment activities is shown in Figure 7.19

Once again discussion shall include those development activities undertaken to create conference facilities for comparative purposes. Educational establishments invested heavily in the creation of accommodation, with all 15 educational establishments stating they undertook refurbishing of rooms and décor in order to create conference facilities. This has declined to 14 (93.3%) who upgraded furnishings since opening and to 12 (80%) with regards décor. This is the highest percentage of any venue classification to invest in the upgrading of furnishings and décor since opening. These findings support Pemble (2002) who identified that investment by BUAC had resulted in the upgrading of student accommodation, which as Section 7.3.3 identified, halls of residence are offered in the majority of instances to conference delegates.

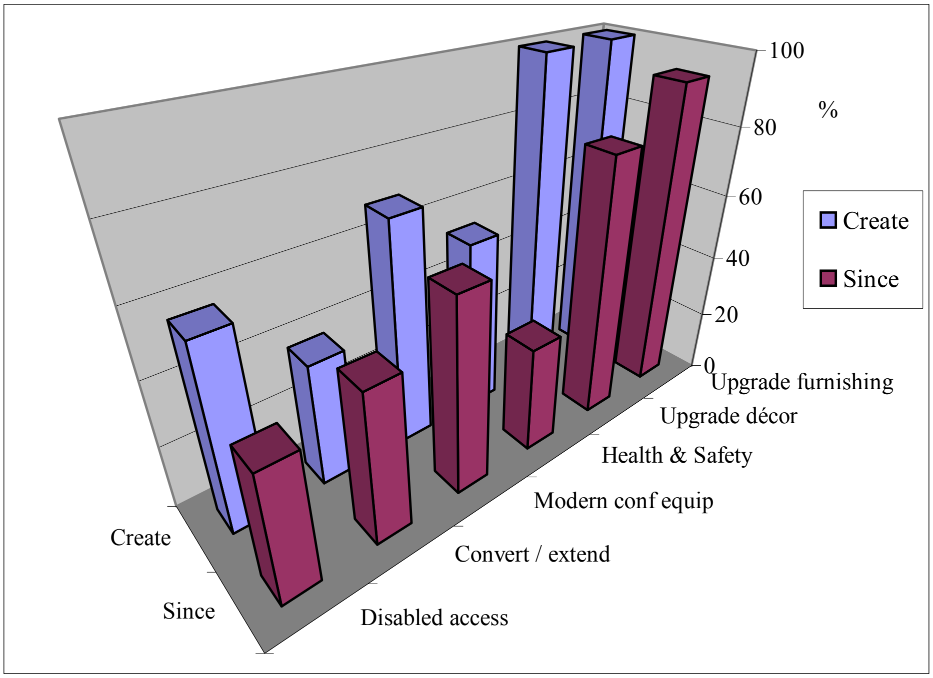


Figure 7.19 – Key factors implemented to create and improve educational establishments conference venues since opening
(N=15)

The factor ranked third with regards to creating conference facilities is that of installing modern conference equipment. This factor remains third when the development activities since creating conference facilities are examined, with nine (60%) educational establishments stating they planned on upgrading their technology. For such venues technical facilities can be used by both conference delegates and academic staff, hence any new technology installed will have a dual role.

A total of eight (57.1%) of educational establishments were required to improve disabled access in order to create conference facilities, although this drops to six (40%) venues that have undertaken such activity since opening. Many educational establishments were constructed during the 19th century and as such did not cater for disabled access. However, as legislation increases so establishments are mandated to cater not only for delegates, but also students and academic staff that require disabled access. The same applies for compliance with health and safety regulations, with seven (53.8%) venues doing so in order to create conference venues. As with purpose-built venues and hotels, complying with health and safety regulations received the lowest level of support since opening, with five (33.3%) venues doing so. Again, this may suggest that venues already comply with regulations, although at the time of creating such facilities many educational establishments were not in compliance and work was required to achieve compliance and hence is not required in successive development programmes since opening.

Converting or extending the venue received the lowest level of support, at five (38.4%) venues, in order to create conference facilities. This increased to seven (46.6%) establishments undertaking structural changes since opening their conference facilities. These results show that initially educational establishments utilised existing space, through improvement to furnishings and décor, rather than any structural changes. Only after conference facilities had been offered did the occurrence of structural changes increase, although work towards complying with health and safety regulations along with access for disabled delegates and non delegates have shown a strong presence across the responding venues.

7.5.6 – The development of visitor attraction conference venues since opening

Visitor attractions have been identified as the newest form of conference facilities within the U.K. conference sector and often come from the most diverse style of business before they entered the conference sector. A total of 53 (71.1%) visitor attractions carried out refurbishments to create the conference facilities, suggesting that almost three quarters of visitor attractions had attempted to prolong their conference product lifecycle, including the initiation of a new lifecycle through rejuvenation. Due to their immaturity, many of them have subsequently refurbished since they originally created their conference facilities, with 39 (52%) visitor attractions doing so. The levels of implementation for the six refurbishment activities can be seen in Figure 7.20.

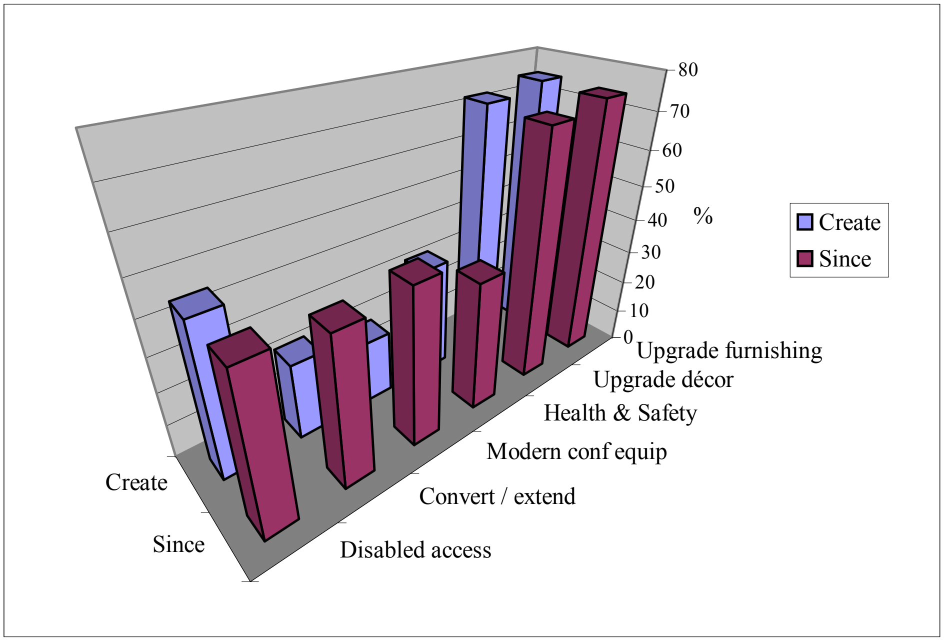


Figure 7.20 – Key factors implemented to create and improve visitor attraction conference venues since opening
(N=39)

Using the statistics regarding the level of improvements undertaken to create conference facilities as a reference point it can be seen that refurbishing furnishings and décor are ranked first and second respectively, with 29 (75%) and 28 (72.5%) in order to create conference facilities. Those factors receiving the lowest levels of implementation are that of improving conference technology with seven (18.6%) attractions responding. Additionally, eight (22.6%) attractions converted and/or extended their venue. When the key factors undertaken since opening are examined, it can be seen that again for improving furnishings and décor are ranked first and second respectively. However, the levels of implementation for improving conference technology along with converting and/or extending the venue have doubled since opening, at 46.1% and 43.5% respectively.

The refurbishment activities favoured throughout the four venue classifications since opening are that of upgrading furnishings and décor. The economic costs of these activities are lower relative to other activities which show a lower level of implementation, such as structural changes to the venues. Additionally, both purpose-built and hotels have undertaken some conversion or extension to the venue.

While educational establishments and visitor attractions have favoured the introduction of modern conference equipment.

7.5.7 – The elapsed time between refurbishments

The decade in which the venue was opened was cross-tabulated with the number of decades between opening and refurbishment, the results of which are shown in Appendix D, Table 7.66, (refer to page 487). Table 7.67 extracts only those entries where the actual responses are higher than expected, as calculated by chi-square analysis.

Table 7.67 – The decade of opening cross tabulated with the number of decades between opening and refurbishment

		Decades between Opening and Refurbishment				
Decade of Opening		Same Decade	1 Decade	2 Decades	3 Decades	4 Decades
1950-1959	Actual				**2**	**1**
	Expected				**0.4**	**0.1**
1960-1969	Actual				**5**	**2**
	Expected				**0.9**	**0.2**
1970-1979	Actual			**10**	**5**	
	Expected			**3.8**	**2.3**	
1980-1989	Actual		**21**	**9**		
	Expected		**12.1**	**6.4**		
1990-1999	Actual	**22**				
	Expected	**10.5**				
2000-2002	Actual	**7**				
	Expected	**3.3**				

(N=111)

Examining the values shown in Table 7.67 it can be seen that venues opening in the 1950s waited between three and four further decades before refurbishing, therefore refurbishment took place in the 1980s and 1990s. For those opening in the 1960s more actual responses were received for three and four decades later, again suggesting that refurbishments occurred in the 1990s and between 2000 and 2001. For venues opening in the 1970s, the majority of respondents stated refurbishment occurred in the 1990s and the first two years of the current decade. Venues opening in the 1980s waited one or two decades, again making the 1990s the most popular decade for refurbishment. The vast majority of venues opening in the 1990s refurbished in the same decade. Seven of those venues opening during this current decade also refurbished in this decade.

The results support the literature review of Section 5.6 which identified examples of refurbishment throughout the four venue classifications during 1990 and the first years of the current decade. The result of the chi-square analysis identifies that the relationship between the year in which the conference venue opened and the number of decade between opening and refurbishment is statistically significant to the 0.001 level. As the number of conference facilities increased, competition within the industry has stimulated the need for conference venues to upgrade their facilities to remain competitive.

In terms of each of the four venues classifications, the most popular decade to refurbish purpose-built venues was the 1990s, with 17 (62.9%) of the 27 venues who provided a year stating this was the case. However, just over a quarter of responding purpose-built venues refurbished in the 1980s, with seven (25.9%) venues responding. The remaining three (11.2%) purpose-built venues refurbished in the current decade. For hotels, 64 venues supplied a year and the most popular decade to refurbish was also that of the 1980s with 33 (51.5%) hotels doing so. Hotels differ from purpose-built venues in that their second most popular decade to refurbish in was that of the current decade, with 26 (40.8%) doing so. Hotels also differing in that one (1.5%) venue stated it refurbished in the 1970s and the remaining four (6.2%) venues refurbished in the 1980s. Only two educational establishments provided a year in which refurbishments took place, with one stating improvements occurred in the 1990s and the other in the current decade. For visitor attractions 18 respondents stated a year in which refurbishments took place, both the 1990s and the current decade experienced eight (44.4%) venues refurbishing. A further one (5.6%) visitor attraction refurbished in the 1980s and like hotels one (5.6%) visitor attractions stated they refurbished in the 1970s.

7.5.8 – The primary reasons for undertaking refurbishments since opening

Appendix D, Tables 7.68 to 7.71, (refer to pages 488 to 491 inclusive) shows four Tables identifying the primary reasons for undertaking refurbishments since opening. The top three reasons for each of the sectors can be seen in Table 7.72.

Table 7.72 – The three primary reasons for undertaking refurbishments since opening

	Purpose-built	Hotels	Educational Establishment	Visitor Attractions
1	**Update décor of rooms**	**Update décor of rooms**	**Update décor of rooms**	*Improve the technical facilities*
2	Keep pace with customer demands	Modernisation	*Improve the technical facilities*	Improve standard of conference facilities
3	Higher standard service and comfort	<u>General refurbishment</u>	<u>General refurbishment</u>	Conference facilities out-dated

For three of the four classifications, namely purpose-built, hotels and educational establishments, the primary reason for undertaking refurbishments was to improve the décor of rooms (this factor is shown in **bold** across the three venue classifications in Table 7.72). Visitor attractions saw the need to improve technical facilities as the primary reason for undertaking refurbishments since opening. This factor was ranked second for educational establishments (this factor is shown in *italics* across two venue classifications in Table 7.72). Although respondents were able to provide free text rather than choose from a list of options, general themes can be seen in the reasons supplied. These are general refurbishment (this factor is underlined in Table 7.72), modernisation, conference facilities were out-dated, improve standard of conference facilities and to keep pace with customer demands all relating to the quality of the conference environment and in particular the service quality of the conference product. Section 5.6 highlights the role that refurbishment plays as a response to the demands of service quality and this research identifies that particularly purpose-built and visitor attraction conference venues have refurbished since opening their conference facilities in order to create a higher standard of service and comfort within the overall conference product.

Table 7.72 shows for the purpose-built classification their priorities are to update the décor of meeting rooms, keep pace with customer demand and to provide a higher standard of service and comfort. These factors can be clearly divided into cosmetic changes and service improvements. Many purpose-built venues were built in the 1970s and 1980s and are therefore may be out dated today. Competition from new styles of venues such as the visitor attractions may encourage the purpose-built venues to improve the cosmetic image of the facilities as well as concentrate of staff relations and service. One primary selling point for a purpose-built venue is the fact that the staff is specifically trained to work within the conference trade, in comparisons to many hotels or visitor attractions which do not offer specific staff for their conference facilities. It may be this that forces the issue to continually improve the staff training and service as a priority to keep competitive in the conference market place. Purpose-built venues were specifically built to offer large conference facilities and to offer the latest technological conference facilities. It may therefore not be a priority to improve the technological facilities in the purpose-built venues, as they already exist. Or many conference organisers may not request them.

For hotels, the three priorities for updating facilities are purely cosmetic, to up-date décor of rooms, modernize the venue and general refurbishment to the venue. Of which both the conference delegate and the hotel guests can benefit. This dual role is important to the hotel as they can justify improving facilities if all guests benefit. Whereas few hotels wish to improve their technical facilities as it will only benefit the conference delegates. To improve technological facilities is not viewed as a priority, this would suggest that hotels do not see the need to introduce technological conference facilities as they are either too expensive, or may not be demanded by the conference organisers considering many of the conferences or meetings held in hotels are small and therefore may require the basic conference materials. If technical facilities are required, it may be cheaper to hire for the duration of the conferences rather than buying the facilities.

For educational establishments, the three priorities are to update the décor of conference rooms, improve the technological facilities and to have general refurbishments. General décor of the venue is viewed a priority, educational establishments need to change the perception of supplying basic conference facilities.

Investment has been made into the industry to improve the décor of the conference facilities so that they are on par with a three star hotel conference facilities. Technological facilities were also seen as a priority to be improved. This suggests that the educational facilities want to stay in front of the market place by offering high technology facilities so that they can continue to provide conference facilities to large conferences. The technical facilities can be used by the conference delegates and the academic staff, thus once again this dual role is an important factor in improving conference facilities. General modernisation is important as many conference facilities offered by educational establishments were established in the 1980s and are therefore 20 years old.

Visitor attractions may require the largest number of cosmetic and/or structural changes in order to offer conferences. For example, a sports stadium is originally built purely for providing sports facilities and only in recent years have they offered conference facilities. Once established as a conference venue, further investment into the conference facilities can be made. Visitor attractions see an improvement of and investment into the technological facilities, improve the overall standard of the conference facilities and thirdly up date the conference facilities as they are outdated probably in comparison to other venues which offer conference facilities as priorities. Visitor attractions entered the market place last, but are already investing in improvements. Furthermore, offering only basic conference facilities to see whether a demand exists for their venue. Once demand has been established, it can be argued that visitor attractions start to improve their conference facilities to remain in the market place. Also competition within visitor attractions has risen within the past decade resulting in venues having to upgrade their conference facilities to remain competitive. Once delegates have visited a visitor attraction, they will probably seek a different visitor attraction for their next conference, as the delegates want to seen a different theme or attraction. It is therefore difficult to attract repeat visitation. A solution is to upgrade the décor and the conference facilities. It is important for the visitor attraction to supply a high standard of meetings facilities, including technical facilities so that they can attract delegates for the high standard of the conference facilities rather than relying on delegates who are interested in the attraction and attract repeat visitation.

7.5.9 – The costs of refurbishments since opening

As identified in Section 6.8.1.1 questions concerning financial data received low levels of response and care should be shown when using the following financial data. The low response rate meant that no further statistical analysis, other than frequencies were possible. The minimum, maximum and average cost of refurbishments is shown in Table 7.73.

Table 7.73 – The cost of refurbishment

Cost of refurbishment	Purpose Built (N=15)	Hotels (N=88)	Educational Establishment (N=10)	Visitor Attractions (N=20)
Minimum (£)	50,000	600	43,000	3,000
Maximum (£)	1,200,000	25,000,000	2,500,000	50,000,000
Average (£)	516,666	1,389,730	1,298,833	6,827,176

For purpose-built venues refurbishment costs were between £50,000 and £1,200,000, which gives an average cost of £516,666. This compares to hotels that have a minimum cost of £600 and maximum cost incurred was £25,000,000. Giving an average cost incurred of £1,389,730. For educational establishments the average amount spent on refurbishing their conference facilities since opening is £1,298,833. This ranged from £43,000 to £2,500,000. For visitor attractions, the average amount spent on refurbishing their conference facilities since opening is £6,827,176. This ranged from £3,000 for a museum to £50,000,000 for an international sport venue. With a relatively small number of high cost refurbishments, the average for an international sports venue is skewed. Purpose-built therefore have, on average, spent the least on refurbishments since opening, whilst visitor attractions have, on average, spent the most. This may be explained by the fact that purpose-built was originally opened with conference facilities and few offer accommodation. Whereas visitor attractions have to undertake much more work to not only create but also maintain conference facilities alongside their original visitor attraction.

7.5.10 – Problems encountered by conference facilities

The discussion continues by examining any problems that were encountered by conference venues. Respondents were asked to rank factors what were considered to be problems for their venue, these factors were identified through the literature review and previously used questionnaires, such as the BCTMS (1999) questionnaire. A list of such factors can be seen for each venue classification in Appendix D Tables 7.74 through to 7.77, (refer to pages 492 to 495 inclusive). The top three factors based upon the mean ranking value can be seen in Table 7.78.

Table 7.78 – Key problems encountered by conference facilities

Rank	Purpose Built	Hotels	Educational Establishments	Visitor Attractions
1	**Lack of breakout rooms / facilities**	<u>Increased competition from other conference facilities</u>	<u>Increased competition from other conference facilities</u>	<u>Increased competition from other conference facilities</u>
2	<u>Increased competition from other conference facilities</u>	**Lack of breakout rooms / facilities**	Lack of trained staff	**Lack of breakout rooms / facilities**
3	Increasing costs	Difficulty of attracting repeat meetings / delegates	Operating problems	Insufficient lead times

(The value of N is shown in the appropriate table in Appendix D, Table 7.74 to 7.77, refer to pages 492 to 495 inclusive)

Two factors dominate across the venue classifications, that of increased competition from other conference venues (this factor is <u>underlined</u> across all four venue classifications in Table 7.78) and also the lack of breakout rooms / facilities (this factor is shown in **bold** across the three venue classifications in Table 7.78). A lack of breakout rooms was seen as the greatest concern for purpose-built venues, whilst it is ranked second for hotels and visitor attractions, with average rankings of 3.36, 4.03 and 4.39 respectively. For educational establishments this factor was ranked seventh with an average ranking of 6.14 and a modal value of four, suggesting that this factor is not viewed as a relevant factor to inhibit development. The modal value is one for purpose-built and hotels conference venues, as well as visitor attractions having a modal value of two for this factor. As Section 7.5.2 identifies, there is evidence that the nature of conferences has changed in favour of smaller break-out rooms, as such with purpose-built venues offering the largest venue capacities there is now a need to provide many smaller areas that offer the same conference conditions demanded of larger rooms.

With regards to hotels, Section 7.3.3 identified that hotels have the smallest conference capacities of the four venue classifications and that visitor attractions have a limited number of additional classrooms. A lack of breakout rooms is not a concern for educational establishments, it is ranked 7th with an average ranking of 6.14. Section 7.3.3 also identified that educational establishments are created with 'learning spaces' and as such this venue classification has approximately twice as many classrooms, 24.1 compared to 12.9 for the other three venue classifications combined. The issue concerning breakout rooms is not applicable to educational establishments. Increased competition from other conference facilities is ranked first for hotels (average ranking of 3.56), educational establishments (average ranking of 4.8) and visitor attractions (average ranking of 4.29) as a key factor which may be identified to hinder development. It is also ranked second for purpose-built with an average ranking of 3.74. The values for standard deviation are between 2.28 and 2.92, suggesting that the ranking values are spread between the minimum and maximum values. Increased competition has occurred as more venues open from across all four venue classifications, as identified in Section 7.4.

Purpose-built venues consider increasing costs to be the third key factor that may hinder development, with an average ranking of 4.05, a modal value of three and a standard deviation of 2.32. Hotels view the difficulty in attracting repeat meetings / delegates as the third most cited concern, with an average ranking of 5.35, a modal value of six and a standard deviation of 2.7. Educational establishments experienced operating problems as key factor that may prohibit the growth of their conference facilities in the future with an average ranking of 4.89, a modal value of one and a standard deviation of 3.57. Operational procedures, such as efficient check in / check out processes, were identified in Section 5.3 as important attributes in the selection of a conference venue. This venue classification is still developing within its lifecycle and within the overall conference sector. As such venues are formalising the processes and procedures required to undertake a successful conference. It is vital that educational establishments resolve these concerns and staff training is an important element in resolving operational problems. Finally visitor attractions consider insufficient lead times to be the third most prohibitive factor, with an average ranking of 5.71, a modal value of five and a standard deviation of 2.64.

Table 7.59 in Appendix D (refer to page 482) identifies the dominant characteristics of the four venue typologies in relation to the creation of conference facilities and refurbishments undertaken since opening. This research has shown that all venue classifications within the conference sector experience problems that may be identified as prohibiting development. It is therefore apparent that venues will need to address problems when they arise in an efficient and effective manner, in order to remain competitive.

This research partially accepts Hypothesis Three that of changes to venue facilities were economically driven. For hotels, educational establishments and visitor attractions this is true, with such venues adding conference facilities in order to generate an additional revenue source and thus the hypothesis can be accepted for these three venue classifications. However, this is not true for purpose-built venues, who developed primarily in response to perceived or actual demand. Overall, refurbishments made since opening have been undertaken in response to the increased competition witnessed in the U.K. conference sector.

7.6 – Hypothesis Four: Future composition of the U.K. conference sector will continue to be dominated by hotel conference venues.

In Section 4.2.1 it was identified that the attitudes held by hotels towards conferences has changed over the last two decades (Davidson & Cope, 2003). By the 1990s hotels accounted for approximately two-thirds of all conference venues (Rogers, 2003) and approximately 70% of all meeting space (Shone, 1998). Based upon the historical development of such venues, forecasting techniques such as double exponential smoothing and Holt's exponential smoothing can be employed to identify the predicted future composition of the U.K. conference sector and in particular to identify whether hotel conference venues will continue to dominate the U.K. conference sector.

7.6.1 – The future development of hotels with no conference facilities.

Figure 7.21 highlights the growth of hotels overtime and identifies that seven (2.4%) hotels opened between January 2000 and August 2001. Double exponential smoothing forecasting, which was discussed in Section 6.10.3.1, smoothes out any fluctuations in time series data and can be seen in Figure 7.21. When undertaking double exponential smoothing forecasting, with smoothing constants optimised in order to minimises the mean square error (alpha = 0.8; beta = 0) shows that 50.9 hotels are forecasted to be built in the current decade. Moreover, 55.5 hotels are forecasted to be built during the decade of 2010-2019. Undertaking Holt's linear trend forecasting, again optimising the smoothing constant, identifies that for the current decade 59 hotels are forecast to open and 68 hotels in 2010 to 2019. Both forecasting methods therefore predict growth within hotel openings over the coming decades, with greater growth predicted in the next decade.

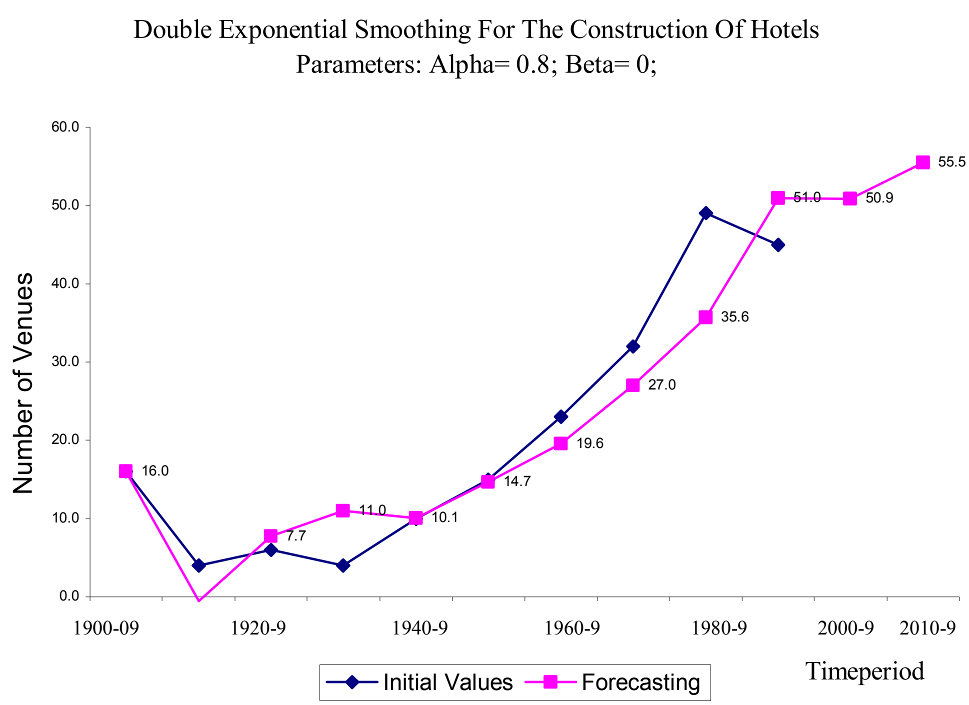


Figure 7.21 – Double exponential smoothing forecasting for the construction of hotels (N=286)

7.6.2 – The future development of educational establishments with no conference facilities

With regards to the development of educational establishments without conference facilities, there are two distinct periods of development. The first is the development prior to 1900 and secondly post 1945, with no educational establishments stating they opened between 1900 and 1945. Figure 7.22 examines the growth within the post-war period and forecasts future growth using double exponential smoothing techniques. When undertaking double exponential smoothing forecasting, with the values of the smoothing constants optimised (alpha = 0; beta=0.1). The forecast line in Figure 7.22 shows that 3.5 educational establishments are forecasted to be built in the current decade and 4.2 are forecasted to be built during the decade of 2010-2019.

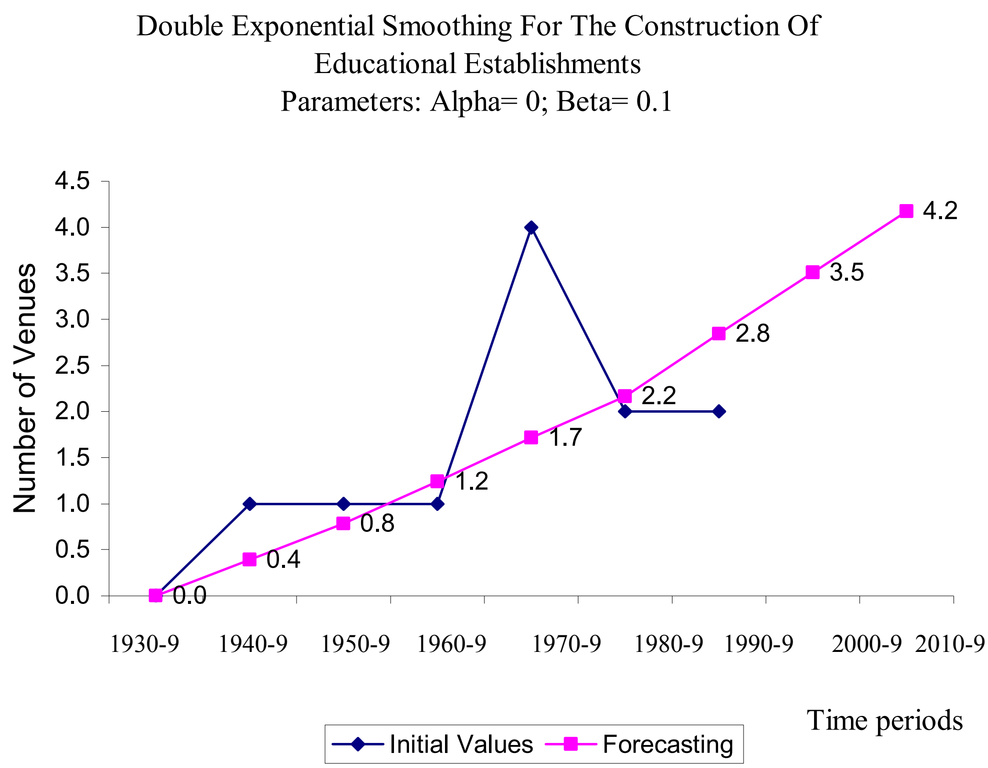


Figure 7.22 – Double exponential smoothing forecasting for the construction of educational establishments

(N=24)

Holt's linear trend predicted 2.01 educational establishments to open during the current decade and 2.05 for the subsequent decade 2010 to 2019. There are differences identified with the forecasts generated. The double exponential smoothing forecasting predict that the number of establishments opening will be higher than the 1990s, however, Holt's linear trend predicts fewer establishments opening than in the 1990s, although there is a relatively small increase or decrease in both instances.

7.6.3 – The future development of visitor attractions with no conference facilities.

The forecasting line for the predicted opening of visitor attractions using double exponential smoothing forecasting is shown in Figure 7.23.

Double Exponential Smoothing For The Construction Of Visitor Attractions
Parameters: Alpha= 0.8; Beta= 0;

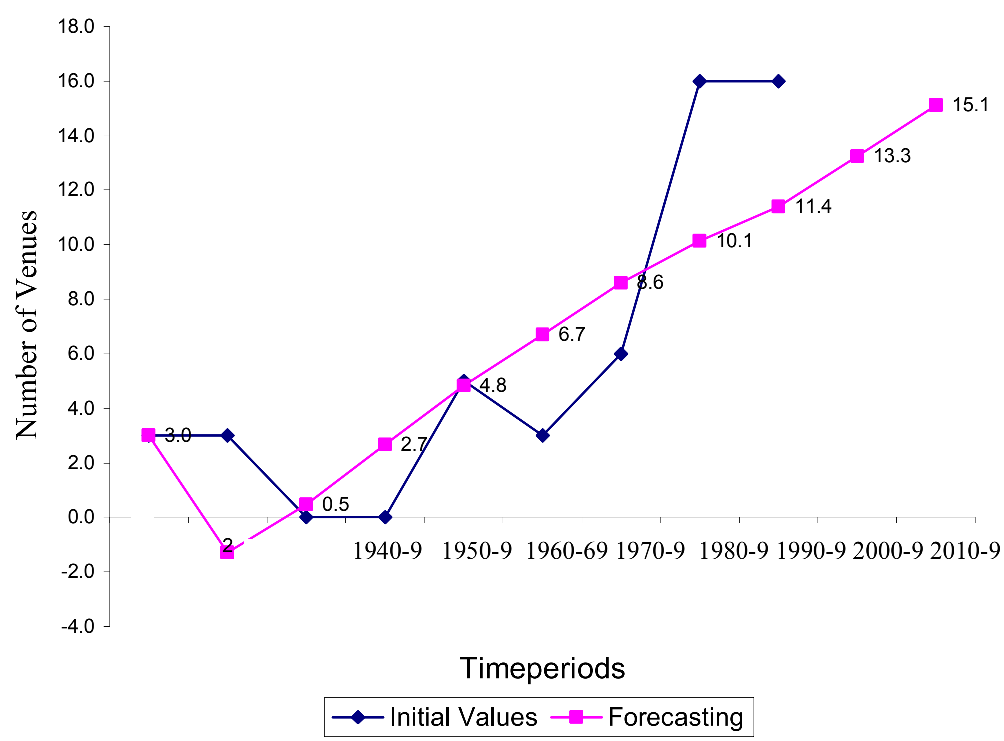


Figure 7.23 – Double exponential smoothing forecasting for the construction of visitor attractions
(N=65)

It is estimated that 13.3 visitor attractions are forecasted to be built in the current decade and 15.1 are forecasted to be built during the decade of 2010-2019. This is in comparison with the Holt's forecasting method, which states that 19.5 attractions may open in the current decade and 23.1 in the subsequent decade. Again, as with the hotel and educational establishments, both forecasting methods predict growth for visitor attraction venues, with the greatest growth between 2010 and 2019.

Overall the predicted growth for hotels, educational establishments and visitor attractions in the U.K. is positive, with growth showing an upward trend. Section 7.4.2 identified that the majority of hotels, educational establishments and visitor attractions were not built and opened at the same time as dedicated conference facilities were initially offered, with 180 (62.9%), 18 (75%) and 54 (72%) responding venues respectively. Figure 7.17 shows the decades in which conference facilities were subsequently added and opened, including the opening of purpose-built venues.

7.6.4 – The future development of purpose-built conference venues

Based upon the number of responding venues that opened during the post-war period forecasting techniques can be utilised to predict the future development of the U.K. conference sector. Applying double exponential smoothing to this historical data and forecasting for two decades in the future can be seen in Figure 7.24. The results suggest that 29.6 purpose-built venues may be constructed and opened in the current decade and 37.1 may be added during the subsequent decade of 2010-2019.

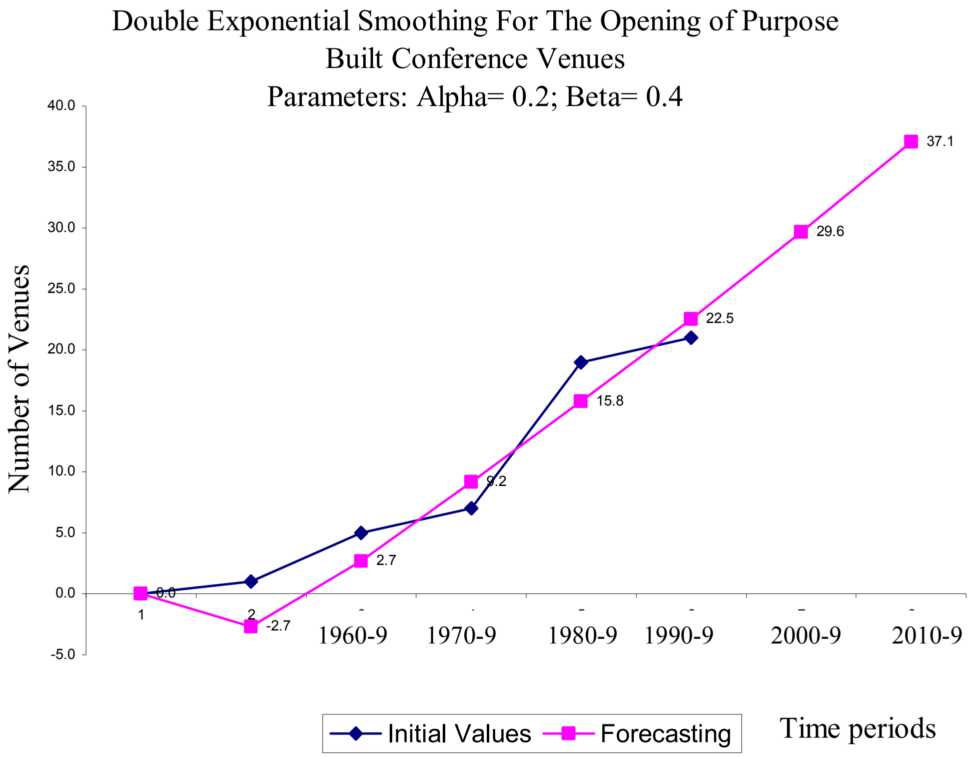


Figure 7.24 – Double exponential smoothing forecasting for the construction of purpose-built venues
(N=53)

This compares to Holt's linear trend which predicts that 34 venues may open in the current decade and 43 venues in the subsequent decade of 2010-2019. Utilising the forecasted values established by double exponential forecasting, as shown in Figure 7.22, the growth rate over the two predicted decades, from 1990-99 to 2010-19 is forecast to be 64%. Overall both methods predict growth in the number of purpose-built opening, with greater growth occurring in the next decade

7.6.5 – The future development of hotels with conference facilities

This research was completed by August 2001, in the first 20 months of the current decade 25 (8.6%) hotels added and opened conference facilities. Undertaking simple linear extrapolation, which does not take into effect the fluctuations in data, through to 2009 it can be seen that 150 venues may provide such facilities in the current decade.

However, when undertaking double exponential smoothing forecasting, shown as the forecasting line in Figure 7.23, 140.5 venues may add conference facilities in the current decade and 172.9 venues are forecasted to open conference facilities during 2010-2019, which is a 23% rise. Utilising the forecasted values established by double exponential forecasting, as shown in Figure 7.25, the growth rate over the two predicted decades, from 1990-99 to 2010-19 is forecast to be 52.8%. Any extrapolation will depend upon the economic conditions and positive demand prevailing.

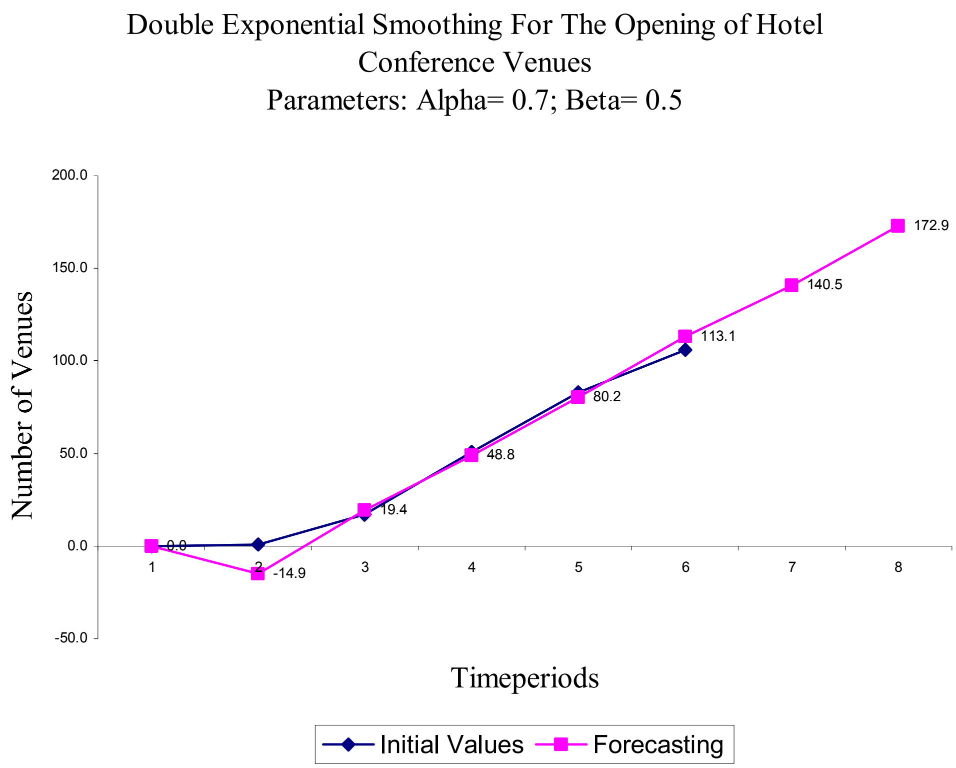


Figure 7.25 – Double exponential smoothing forecasting for hotels adding conference facilities
(N = 286)

Previous discussion examining the predicted number of hotels opening identified that based on the responding survey population, 122.8 hotels are likely to open in the current decade however, 140 hotels are likely to add conference facilities. The ratio between the number of hotels opening and the number offering conference facilities has risen from the 1950s, where it stood at 1:0.28. This ratio indicates that in the

1950s for every one hotel opening, 0.28 hotels added and opened conference venues, thus for every four hotels that opened only one would offer conference facilities.

As such the proportion of hotels offering conference facilities in the 1950s can be considered low. This ratio has grown to 1:0.73 in the 1960, 1:1.59 in the 1970s, 1:1.69 in the 1980s until the 1990s at 1:2.35. In the 1990s for every one hotel opening a further 2.35 were adding and opening conference facilities. As such in the 1990s there were twice as many hotel opening conference venues as those opening hotels alone. In the future it is predicted that during the current decade for every one hotel opening, 2.7 hotels will open conference facilities and between 2010 and 2019 this ratio rises again to 1:3.11. These results show that as well as a general increase in the number of hotels opening in the U.K., the proportion of hotels adding conference facilities has also increased through the post-war decades and this proportion is predicted to rise in the future.

7.6.6 – The future development of educational establishment with conference facilities

By utilising double exponential smoothing to predict the number of educational establishments identifies that 12.5 venues are forecast to add conference facilities in the current decade and 15.3 educational establishments will add conference facilities during 2010-2019, which is shown in Figure 7.26. Utilising the forecasted values established by double exponential forecasting, as shown in Figure 7.24, the growth rate over the two predicted decades, from 1990-9 to 2010-9 is forecast to be 47.1%. Holt's forecasting method identified that based on the responding survey population, ten educational establishments are likely to open in the current decade and 11 are expected to open in the next decade. However, during the 1990s, two venues were constructed, while nine venues have added conference facilities. These figures suggest that since the 1990s the number of educational establishments being built has reduced by 16.5%, whilst there has been a 10.5% increase in the number of establishments adding conference facilities in the current decade when compared to the 1990s.

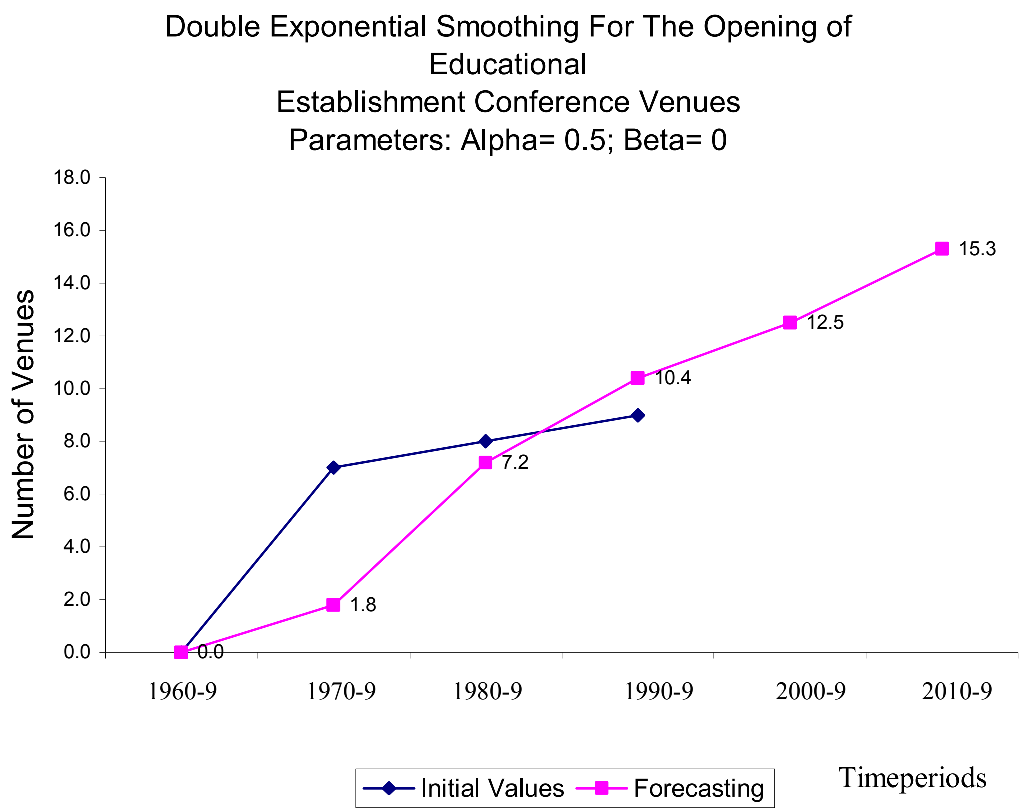


Figure 7.26 – Double exponential smoothing forecasting for educational establishments adding conference facilities

(N=24)

Although the absolute number of educational establishments opening is predicted to reduced. The 'open:offering' ratio has risen constantly from the 1970, when it stood at 1:1.75. In the 1980s this increased to 1:4, with the 1990s for every one educational establishment opening 4.5 such venues added conference facilities. Whereas in the current decade this has reduced to 1:3.57, consequently for every one establishment opening in the current decade, 3.57 are adding conference facilities. However, using the values established by exponential smoothing identifies that the open:offering ratio is predicted to reduce in the current decade to 1:3.57 before rising again to 1:3.64 between 2010 and 2019. As with hotels, the proportion of educational establishments offering conference facilities has grown during the post-war period, although it is predicted to fall slightly in the current decade before rising once more in the subsequent decade.

7.6.7 – The future development of visitor attraction conference facilities

Between 2000 and August 2001, 12 (16%) visitor attractions within the sample population added conference facilities. When undertaking simple linear extrapolating the data highlights that between 2000 and 2009, 72 attractions would theoretically add conference facilities. However, establishing double exponential smoothing forecasting as shown in Figure 7.27, identifies that during the current decade 23.25 visitor attractions are forecasted to add conference facilities. During 2010-2019, 22.73 venues are predicted to add conference facilities. Utilising the forecasted values established by double exponential forecasting, as shown in Figure 7.27, the growth rate over the two predicted decades, from 1990-99 to 2010-19 is forecast to be 76.7%. These are the largest predicted growth values across the four venues classifications. Whilst Holt predicted 48 attractions would add conference facilities in the current decade and 61 would do so in the subsequent decade.

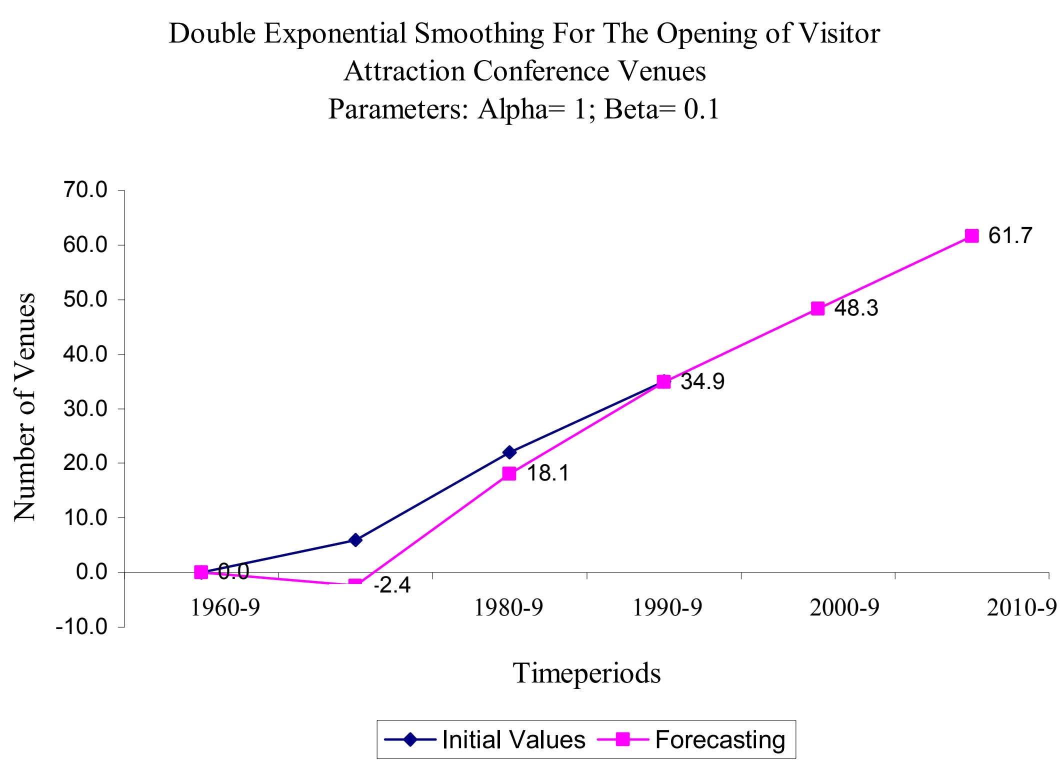


Figure 7.27 – Double exponential smoothing forecasting for visitor attractions adding conference facilities

(N=75)

Holt's forecasting method identified that based on the responding survey population, 32.3 visitor attractions are likely to open in the current decade and 48 attractions are likely to add conference facilities. However, during the 1990s, 24 venues were constructed, while 35 venues have added conference facilities.

With the absolute number of visitor attractions opening increasing, the 'open:offering' ratio is also rising. In the 1970s for every one visitor attraction opening, one added conference facilities, this rose to 1:1.37 in the 1980s and in the 1990s it stood at 1:2.18. In the current decade this is predicted to rise further to 1:3.63, which is based upon the forecasted values obtained using exponential smoothing techniques. Finally for the years 2010 to 2019 the proportion of visitor attractions opening conference facilities rises further to 1:3.64. These results show that there is an increase in both the number of visitor attractions opening, an increase in the number of attractions adding conference facilities and the 'open:offering' ratio has also increased since the 1970s.

The future composition of the U.K. conference sector has been identified using forecasting techniques and in particular the dominant venue classification had been identified in response to the hypothesis. The growth experienced throughout the post-war period is expected to continue. Forecasting techniques of double exponential smoothing and Holts forecasting methodologies have predicted that hotels will remain the dominant venue classification between 1990-99 and 2010-19. However, it is visitor attractions with conference facilities that are forecast to experience the greatest levels of growth (76.7%) between 1990-99 and 2010-19. Overall the proportion of hotels, educational establishments and visitor attractions offering conference facilities has increased during the post-war period and is expected to rise further in the current and subsequent decade.

7.6.8 – Future plans to refurbish purpose-built conference venues

Having predicted the future composition of the U.K. conference sector using forecasting techniques, Objective Four of this research aims to identify the future development of the venue classifications. This includes any proposed refurbishments, the rationale behind such refurbishments, the financial provision made for future development and any factors restraining future development. In light of the predicted growth rates established using exponential smoothing techniques, respondents were asked whether or not they had any future plans to refurbish the conference venue. The response levels obtained to the same six refurbishment activities can be seen in Figure 7.28. The response levels for the refurbishment activities undertaken since the purpose-built venues opened are shown for comparative purposes. Twenty three (43.4%) purpose-built venues stated they intended to undertake some degree of refurbishment in the future. Upgrading furnishing was the most common activity undertaken since the venue opened and this remains the most popular activity planned for the future with 16 (69.5%) venues stating this was the case.

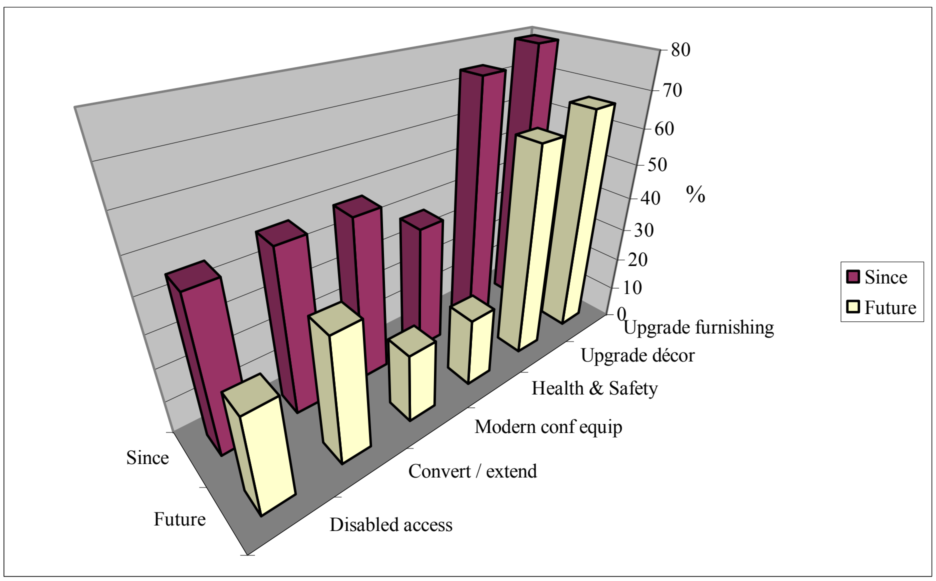


Figure 7.28 – Key factors implemented to improve purpose-built venues; since opening and in the future

(N=23)

The second most popular activity since opening was that of upgrading the décor, with 29 (74.3%) venues stating they had done so. In the future refurbishing the décor also remains the second most popular activity, however, the proportion of respondents planning this activity falls to 15 (65.2%). Again these results support the findings of Lawson (2000) who states that the quality of the interior in terms of comfort, warmth, colour, furniture, general fixtures and fittings should be kept in mind when refurbishing and general fixtures and fittings. Refer to Section 7.5.3 for discussion on the implication of upgrading both furnishings and décor in relation to service quality.

Similar levels of implementation were experienced for installing modern conference equipment, converting and/or extending conference facilities and the provision of disabled access when respondents were asked to identify refurbishments undertaken since opening. In the future, it is converting and/or extending facilities to provide more breakout rooms that maintain the highest levels of implementation of these three factors, with nine (39.1%) venues planning such changes. The other two factors, namely installing modern conference equipment and the provision of disabled access, experience a decline in the level of future implementation with five (20.8%) and seven (29.1%) venues responding respectively. Purpose-built venues aim to provide the most sophisticated conference facilities (McCabe et al, 2000). However, these results show a low level of modernising technology in the future for purpose-built venues, and thus go against McCabe et al (2000).

7.6.9 – Future plans to refurbish hotel conference venues

Of the 283 hotel respondents, 100 (35.3%) stated they do have plans to renovate in the future. Moreover 183 (64.7%) hotels stated that they do not. This should be seen again in context, in that 64 hotels upgraded their facilities during 2000-2001 and thus no future renovations are planned in the future. The refurbishments activities planned for the future can be seen in Figure 7.29, those activities undertaken to both create conference facilities and since opening are shown for comparative purposes.

Upgrading furnishings and décor were the most cited activity undertaken since opening. However, their level of implementation drops considerably in respect to future refurbishments. The hotel venue classification is the only venue classification in which updating décor and furnishings did not rank first and second for future development activity. Since opening 110 (68.7%) hotels had upgraded their furnishings whereas in the future 41 (41%) hotels plan to do so. With regards to upgrading décor, 107 (66.8%) hotels had undertaken such activity since opening but 19 (19%) planned this activity in the future.

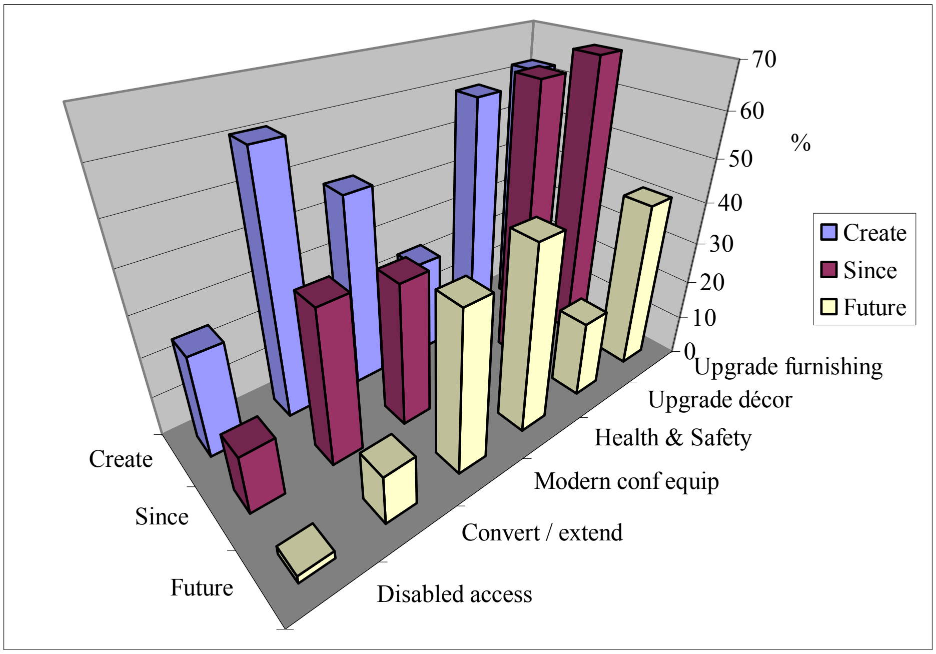


Figure 7.29– Key factors implemented to improve hotel venues; to create conference facilities, since opening and in the future
(N=100)

Future plans show that even fewer hotels, 12 (12%) plan on converting or extending their venues, falling from 60 (37.5%) venues stating that had undertaken such activity since opening. The same applies for providing disabled facilities, progressively fewer hotels aim to improve disabled facilities in the near future, with 23 (14.3%) undertaking this work since opening and two (2%) hotels planning to undertake this improvement in the future. Of the six factors in question only two experienced an increase over the levels undertaken since opening. Although health and safety compliance received a low level of implementation of 24 (15%) since opening, in the future it has the highest level of planned implementation, with 45 (45%) venues doing so. In order to create conference facilities, hotels invested in purchasing modern conference equipment, with 130 (46%) doing so. Subsequently 74 (35%) hotels have invested in modern conference equipment since the conference facilities were opened and 39 (39%) aimed to invest in the future.

Over the three time periods understudy, that of to create, since opening and in the future, it can be seen that hotels initially undertake activities that will benefit both delegates and non delegates, such as furnishings and décor. It is only in the future that the level of implementation for activities specific to the delegate, such as the implementation of conference audio-visual equipment, begins to increase.

7.6.10 – Future plans to refurbish educational establishment conference venues

A total of 15 (62.5%) educational establishments plan improvements in the future, whereas nine (37.5%) do not. The refurbishments activities planned for the future can be seen in Figure 7.30. Those activities undertaken both to create conference facilities and since opening are shown for comparative purposes.

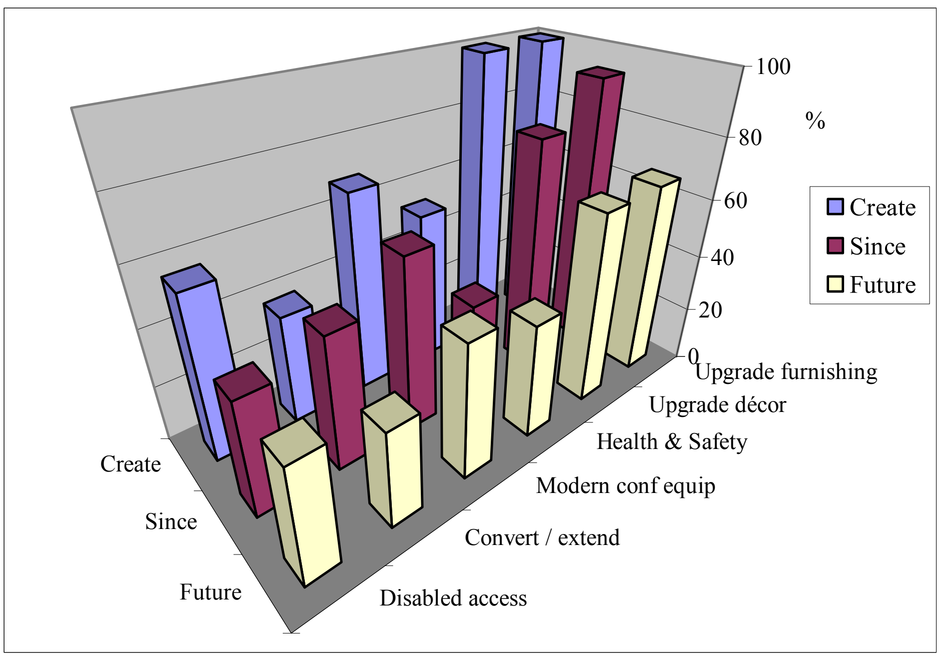


Figure 7.30 – Key factors implemented to improve educational establishment venues; to create conference facilities, since opening and in the future (N=15)

For four of the six factors educational establishments exhibit a continual decline in the number of improvements since creating their conference facilities to those planned in the future. These being the improvements to furnishings and décor, along with installing modern conference equipment and installing disabled access. However, this is not necessary a negative point, rather it suggests that unlike hotels and visitor attractions, educational establishments may have invested heavily in order to create conference facilities. For example, to create the conference facilities it was deemed to be important to update the décor and furnishings of venues, with the aim being to supply accommodation facilities to a standard of at least a three star hotel.

Educational establishments are actively aiming to improve their conference facilities in the future. For educational establishments it can be seen that upgrading furniture and the décor of the rooms remain the most popular activity, with ten (66.7%) and nine (60%) venues planning such activities respectively. Overall refurbishing the furnishings and décor is a relatively low cost activity that maintains the customer facing appearance and aesthetics of the venue. Installing modern conference equipment remains third when the development activities planned for the future are examined, with five (33.3%) venues stating this was the case. Additionally, seven (46.6%) venues are planning on improving disabled access and six (40%) are planning refurbishments to comply with health and safety regulations.

The lowest level of support for a future refurbishment activity is that of extending or converting the venue, with five (33.3%) respondents stated that in the future they intend to convert or extend existing facilities to provide more meetings or break out rooms. This low level of implementation for structural changes reflects the fact that educational establishments, as discussed in Section 7.3.3, have the largest number of breakout rooms within the four venue classifications. Additionally, as Table 7.78 identifies, educational establishments are the only venue classification that is not concerned with a lack of breakout rooms.

7.6.11 – Future plans to refurbish visitor attraction conference venues

Over half of responding visitor attractions, forty (53.3%) such venues stated they had plans to refurbish in the future. However, 35 attractions (46.7%) stated they did not plan future renovations. The refurbishment activities planned for the future can be seen in Figure 7.31. Those activities undertaken to both create conference facilities and since opening are shown for comparative purposes.

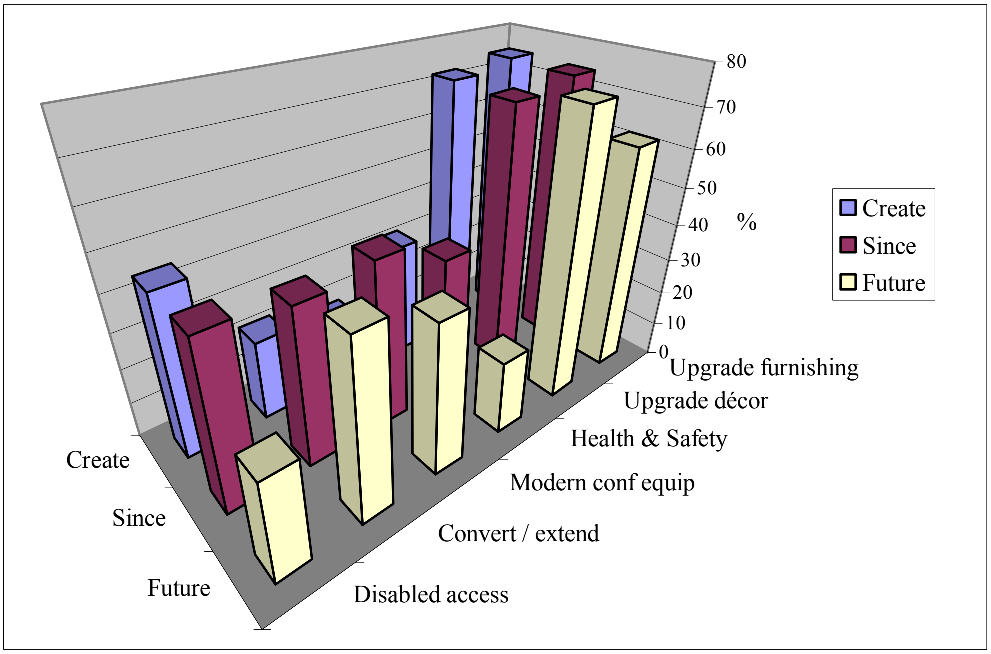


Figure 7.31 – Key factors implemented to improve visitor attraction conference venues; to create conference facilities, since opening and in the future (N=40)

For those improvements planned for the future, the number of venues implementing improvements in their décor rises to a level above that undertaken to create conference facilities, 30 (75.8%) compared to 29 (72.5%). Structural changes through the extension of the venue are ranked third for future activities at 19 (47.5%), while improving conference technology are ranked fourth for future activities at 17 (42.5%). The provision of disabled access and improvements to comply with health and safety regulations were ranked third and fourth with regards to the creation of the conference facilities, whereas in the future they are ranked fifth and sixth respectively, with 11 (27.5%) and 8 (20%) respondents stating they planned on undertaking these activities.

These findings suggest that some degree of non-compliance with health and safety existed within this venue classification and that work was required to correct this, rather than installing modern conference facilities. Now this work has been completed, development to comply with health and safety regulations receives the lowest level of implementation and the proportion of venues installing modern conference equipment has doubled. Improvements in their décor, improving conference technology along with converting and/or extending the venue are all activities that have a greater level of implementation in the future than did so to create conference facilities. This suggests that many visitor attractions entered the market by undertaking limited development activities and as such offering only basic conference facilities. It is at a later date that visitor attractions have started to invest money to improve their conference facilities.

7.6.12 – The year in which the future renovations are to be carried out

Continuing the examination of future developments for the four venue typologies, the year in which the refurbishment was planned was ascertained from the respondent. Figure 7.32 shows the responses provided cross tabulated with the venue classification.

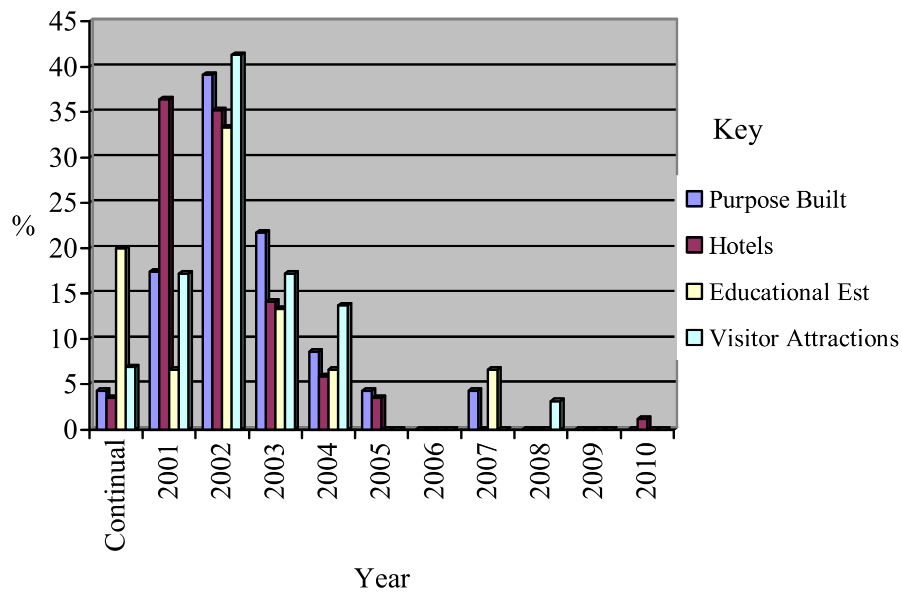


Figure 7.32 – Future plans; year of planned renovations
(Purpose-built N=23; Hotels N=85; Educational Establishments N=15; Visitor Attractions N=29)

It can be seen from Figure 7.32 that most venues have refurbishment plans for 2002-2003, very few venues have plans to refurbish beyond 2003. Some venues renovate and upgrade their facilities on a continual basis. This may be due as short term plans have only been made, with no substantive long term plans in place due to the rate of change in the market place. “The conference and meeting market is cyclical in nature and susceptible to change in the business environment. The current slow down of the global economy and impending recession have the potential to decrease conference and meeting activity in the near future" (Weber & Chon, 2002, p.203). For this reason venues may be apprehensive towards investing into new facilities and upgrades. With regards to each venue classification, 23 of the 53 purpose-built venues stated that they would be carrying out future renovations. The results show that nine (39.1%) state that their venue will carry out refurbishments during the year 2002. Five (21.7%) will carryout refurbishments during 2003. Figure 7.32 shows that only two (8.6%) have long-term proposals for refurbishment, i.e. more than three years ahead.

Of the 85 hotels that responded the majority stated that refurbishments were taking place in the remaining months of 2001 or during 2002, with 31 (36.4%) and 30 (35.2%) doing so. Twelve (14.1%) hotels stated that they are planning to undertake refurbishments / alterations during 2003, nine hotels (10.5%) had longer term plans and aimed to carry out refurbishments during 2004, 2005 and 2010. Only three (3.5%) venues stated that refurbishments were on going. Of the 15 educational establishments that responded, five (33.33%) stated that refurbishments were to take place during 2002. Three (20%) venues stated that refurbishments were on going. Only two (13.3%) educational establishments are planning to undertake refurbishments / alterations in 2004 and 2008. The data suggests that refurbishments are not planned years in advance, rather carried out in the near future, within the subsequent year or on-going.

Five (17.2%) of the 29 visitor attractions stated that they were undertaking or planning to undertake refurbishment in the same year as the survey, that of 2001. The modal year is that of 2002, with 12 (41.3%) attractions planning on undertaking alterations in that year, this reduces to five (17.2%) venues planning refurbishments in 2003. The further away from the survey year the fewer attractions are planning to undertake refurbishments, with four (13.7%) and one (3.44%) venues stating they planned alterations in 2004 and 2008 respectively. The data suggests that refurbishment is an activity that is seen as relatively urgent, with the majority or respondents (58.5%) planning such activity in the survey year or within the subsequent year. For purpose-built venues refurbishments may occur during a period of four years, from 2003 to 2006 inclusive. For hotels refurbishments are planned more frequently, with respondents stating three distinct shorter periods of 2001-2002, 2005–2006 and 2010, while educational establishment prefer continuous refurbishments and for visitor attractions refurbishment is seen as an activity to undertake early in this current decade.

7.6.13 – The primary reasons for undertaking refurbishments in the future

In responding to Objective Four, not only were the actual refurbishment activities established along with the year, but also the rationale behind such refurbishment activities. The reasons why refurbishments are to take place in the future can be seen in Appendix D, Table 7.79 through to Table 7.82 (refer to pages 496 to 499 inclusive). The three most cited responses for each venue classification can be seen in Table 7.83.

Table 7.83 – The top three primary reasons for undertaking future refurbishments

	Purpose Built	Hotels	Educational Establishment	Visitor Attractions
1	**Update décor of rooms**	**Update décor of rooms**	**Update décor of rooms**	<u>Improve the technical facilities</u>
2	Increase exhibition meeting room capacity	Keep pace with customer demands	<u>Improve the technical facilities</u>	Improve standard of conference facilities
3	*General refurbishment*	*General refurbishment*	*General refurbishment*	**Update décor of rooms**

Common factors cited across more than one venue classification are seen in **bold**, <u>underlined</u> and also *italics*

Across the U.K. conference sector, all four venue classifications consider the need to maintain the quality of the conference environment as paramount. For three of the four venue classifications updating décor and general refurbishments formed two of the top three reasons for refurbishments in the future. For purpose-built venues, the second most cited factor for undertaking future improvements was to increase the capacity of the venue. Again reflecting that the primary differentiating factor between this venue classification and the other three classifications is the larger capacities offered by purpose-built venues. For hotels keeping pace with the demands of their customers was the second most cited factor. Improvement activities related to technology did not feature in the top three reasons for either purpose-built or hotels, but was the second most cited action for educational establishments and was the primary reason for improvements in visitor attractions.

This research highlights that for the youngest venue classification, that of visitor attractions, improvements in technology are factors driving improvements. For more established venues, such as educational establishments a combination of cosmetic changes and technology are driving change. Finally the most established venues, in terms of the length of their lifecycle (purpose-built and hotels), favour cosmetic changes as well as improvements to the structure and are responding to changes in the demands of their delegates and conference organisers.

7.6.14 – The budgets for future refurbishments

The minimum, maximum and average budgets assigned for future refurbishments are shown in Table 7.84.

Table 7.84 – Budgets for future refurbishments

Cost of refurbishment	Purpose Built N=23	Hotels N=85	Educational Establishment N=9	Visitor Attractions N=27
Minimum (£)	30,000	2,000	140,000	5,000
Maximum (£)	20,000,000	15,000,000	40,000,000	40,000000
Average (£)	5,325,555	982,037	8,548,333	3,938,462

For purpose-built venues, nine out of the 23 (36%) venues stated the proposed budget for the future plans to refurbish or to extend their conference facilities. The sums ranged from a minimum budget of £30,000 to a largest budget of £20million. Four venues had budgets greater that £7million, whereas five venues had a budget between £30,000 and £500,000. The mean budget for the proposed future plans was £5,325,555.

For hotels, 85 out of the applicable 100 (85%) venues stated their proposed budget for future refurbish. The sums ranged from a minimum budget of £2,000 to a largest budget of £15million. Four venues had budgets equal or greater than £1million. The mean budget for the proposed future plans was £982,037, which is the smallest average refurbishment budget across the four venue classifications. Nine of the 13 (69.2%) eligible educational establishments supplied a figure, with the average proposed budget being £8,548,333, although this ranges from £140,000 to £40,000,000. This sector has the largest average budgets for future refurbishments.

Finally, 27 visitor attractions responded out of the 35 (77.1%) eligible to answer this question provided financial data for future improvements. The budget for such improvements ranged from £5,000 for a leisure centre to upgrade the furniture and décor, to £40 million for a brewery to build apartments in order to provide accommodation to delegates. The average expenditure planned for future improvements is slightly below £4 million, at £3,938,462.

As stated in Section 7.6.12 educational establishments are undertaking the greatest level of future refurbishments and the financial figures reflect this. The costs of future refurbishments are the greatest for educational establishments, whereas for hotels the financial budgets for future refurbishments are the lowest.

7.6.15 – Are future refurbishment financially constrained?

Although the nature of future refurbishments have been discussed, along with the year in which such actions took place and the cost, respondents were asked whether future refurbishments were financially constrained. This question aims to identify whether financial constraints exist within the U.K. conference sector.

Undertaking statistical analysis in order to test the null hypothesis, that no statistically significant relationship exists between the nature of the venue and whether further refurbishments are financially constrained, shows that this relationship is significant to the 0.05 level. Again examining the actual and expected responses, which are a product of the chi square analysis, identifies that this relationship is characterised by both purpose-built and educational establishments declaring that they are indeed financially constrained. Section 7.3.2 identified that it is these two sectors that are characterised by higher levels of public ownership and that funding from public bodies has reduced over time. It can therefore be seen that with such a reduction in funding, constraints have been introduced into two venue classifications of the U.K. conference sector.

When undertaking chi square analysis examining the decade in which the venue opened and whether financial constraints apply to future refurbishments, it can be seen that this relationship is statistically significant to the 0.1 level. In particular those opening in the 1980s stated that future refurbishments were indeed financially constrained. Previous research has highlighted that the expansion in conference centres in the 1980s was from Local Authorities (Public Ownership) (Spiller & Ladkin, 2000). As public funding reduces to these venue classifications so financial constraints will become apparent within venues.

When examining absolute response values, of the 53 purpose-built respondents 18 (34%) said ‘yes’ they would like to carry out alterations to the conference facilities but they are restricted due to financial constraints. Thirty five (66%) venues do not face financial constrains. The lowest level of constraint can be seen in the hotels sector. With 276 respondents replying to this question, the majority of 211 (76.4%) hotels replied ‘no’. However, 65 (23.6%) hotels did identify that they have financial constraints which impedes their changes. For educational establishments, the highest levels of constraint are seen, with 11 (45.8%) venues stating that such a constraint did exist. The remaining 13 (54.2%) respondents stated that there were no financial constraints. For visitor attractions over a quarter of the venues, 20 (26.6%) stated that such a constraint does exist. The remaining 55 (73.4%) respondents stated that there were no financial constraints.

Overall financial constraints are not experienced by the majority of responding venues across the four venue classifications. However, two classifications of the conference sector are more prone to financial constraint, that of purpose-built and educational establishments. This susceptibility is based in the fact that many venues in these classifications are publicly owned and that funding to such publicly funded venues is decreasing. Those venues that announced that their conference facilities did have financial constraints were then asked what development would be undertaken if financial constraints were not present.

7.6.16 – Financial constraints faced by the conference venues

Respondents were provided with the same list of refurbishment activities as previously discussed. The responses cross-tabulated with the nature of the venue can be seen in Figure 7.33.

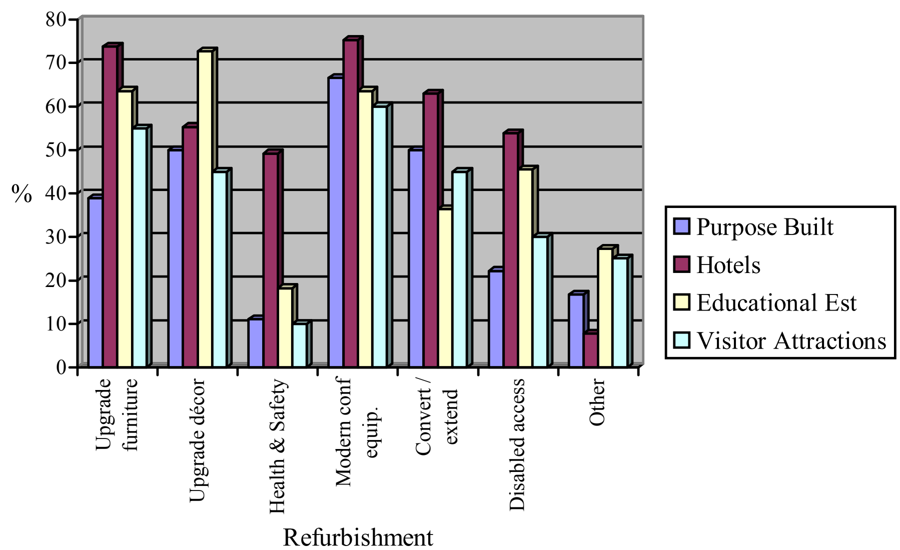


Figure 7.33 – Financial constraints; what would be done?
(Purpose-built N=18; Hotels N=65; Educational Establishments N=11; Visitor Attractions N=20)

When examining the four venue classifications, 18 (36.8%) respondents identified that their purpose-built venues had restricted future development due to financial constraints. Respondents were able to select more than one refurbishment. Twelve (66.6%) venues would install modern conference equipment, nine (50%) venues would convert or extend facilities to provide more meeting or breakout rooms and nine (50%) venues would upgrade existing rooms by improve the standard of décor. Few venues suggested complying with health and safety regulations or providing disabled access or facilities were financially constrained. This suggests that the majority of venues see modernising facilities, improving décor, conference equipment and extending size/number of breakout rooms as of great importance, to meet the needs of the growing market.

Hotel respondents have acknowledged two costly changes, renovations and buying technical equipment, which would take place if financial limitations were not present. Of the 65 respondents which stated financial constraints existed, 49 (75.3%) suggested that they would install modern conference equipment, closely followed by 48 (73.8%) respondents how would upgrade existing rooms by improving the standard of décor. Thirdly, 41 (63%) respondents identified that they would convert or extend existing facilities to provide more meeting or breakout rooms. Additionally, 36 (55.3%) respondents identified the need to upgrade existing rooms by improving the standard of décor, closely followed by 35 (53.8%) and 32 (49.2%) respondents stating that if financial constraints were not an issue they would provide disabled facilities and comply with heath and safely regulations.

Of the 11 educational establishments that stated their conference facilities did have financial constraints, eight (72.7%) venues would improved their facilities by upgrade existing décor. Seven (63.6%) responses were obtained for both the need to upgrade existing rooms by improving the standard of furnishings and installing modern conference equipment. Moreover five (38.4%) venues stated that improving their disabled access could not be undertaken and four (30.7%) venues suggested converting or extending existing facilities to provide more meeting or breakout rooms was being constrained due to financial concerns. Three (27.2%) venues suggested other requirements such providing Internet / computer access and providing en-suite facilities. Additionally, two (15.3%) venues suggested improving health and safety standards were being prevented due to financial constraints.

Finally 12 (60%) visitor attractions would improve their facilities by installing modern conference equipment and 11 (55%) would upgrade existing rooms by improving the standard of furnishings if financial constraints were not present. Converting or extending existing facilities to provide more meeting or breakout rooms and upgrade décor both were cited by nine (45%) respondents. Both constructing breaking out rooms and upgrading conference equipment are costly activities, which may hinder the growth and or financial viability for these conference facilities. This research as highlighted that if financial constraints do exist, then a wide range of refurbishment activities are prevented. Although complying with health & safety, the installation of modern conference equipment, upgrading furnishings and the installation of facilities for disabled delegates are all statistically significant with regards to the nature of the venue.

Identifying whether any statistical relationship exists between the factors that would be undertaken if financial constraints were not present and the nature of the venue shows that four factors are statistically significant. Complying with health & safety standards and installing modern equipment is significant to the 0.1 level, which means that this activity is highly likely to be found in conference venues across all four venue classifications. Analysis shows that educational establishments are the most prone to financial constraints on health and safety refurbishments. Where as financial constraints on the installation of modern conference equipment is seen in both the educational establishments and hotel conference venues. The upgrading of furnishing is significant to the 0.05 level. This relationship is particularly strong for both the educational establishment and hotel sectors. Finally installing facilities for disabled delegates is the most significant, at the 0.01 level and this is experienced by three venue classifications, that of purpose-built, educational establishments and visitor attractions.

The findings suggesting that if there were no financial constraints present, the majority of venues would undertake both lower cost activities, such as redecoration or refurbishing and higher cost activities, such as buying modern conference equipment and extending conference facilities. This suggests that many venues would like to expand their conference business by building larger facilities, or that many feel their facilities are not adequate in size at present. Many respondents would like to invest in technical equipment to keep up to date with the growing demands for the latest technology available so that they can attract more business meetings to their venues

A significant statistical relationship exists between whether financial constraints exists and the decade in which the venue opened, in so much as venues opening in the 1980s are more prone to financial constraints. Additionally there is no statistically significant relationship between the decade in which the venue opened and the actual refurbishment activity constrained. This suggests any refurbishment activity could be constrained for venues opened in the 1980s.

7.6.17 – What is the future plans for the conference facility?

Respondents were asked development plans that extend beyond merely refurbishment of the venue were asked of respondents. Respondents were given an extended list of activities and asked what they have planned for their conference venue. The results of this question has been cross-tabulated with the nature of the venue to identify the level of support of each factor across the four venue classifications and the results can be seen Figure 7.34.

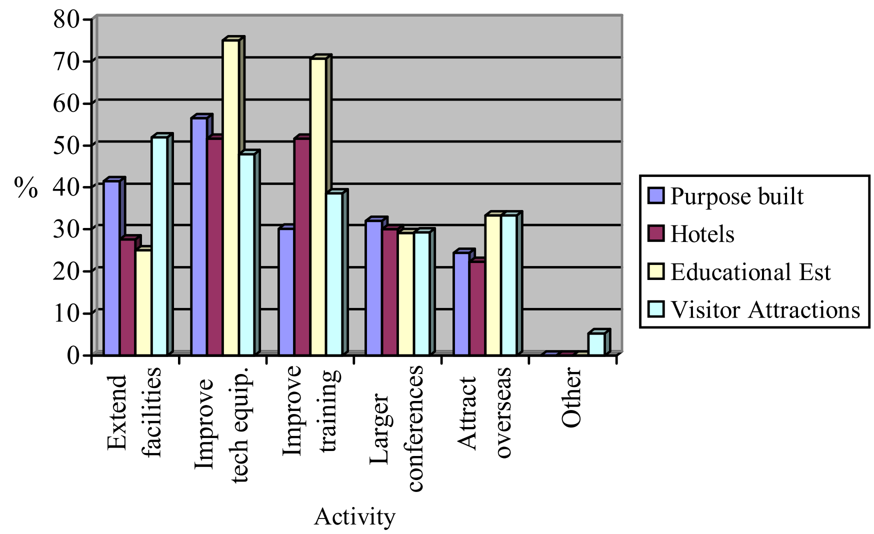


Figure 7.34 – What are the future plans for the conference facility?
(Purpose-built N=53; Hotels N=286; Educational Establishments N=24; Visitor Attractions N=75)

Chi square analysis was carried out to identify whether a relationship existed between the venue classification and planned activities for the conference facilities. This statistical test identified that one factor was significant to the 0.005 level, that of improving staff training. Hotels and educational establishments are more likely to implement this factor, as opposed to purpose-built venues and visitor attractions.

As stated in Section 5.3 as the U.K. conference sector matures it will be the quality of service delivered by the sectors employees that will differentiate one venue from another as the general physical conference product has greatly improved (Rogers, 2003). Additional statistical tests examined whether a significant relationship exists between the same factors and the decade in which the venue was opened. Results show that no significant relationship exists for any of these factors and the decade of opening.

7.6.17.1 – Future plans for purpose-built conference venues

Of the 53 responding purpose-built venues, nine (16.9%) stated that they had no future plans for their conference facilities. Additionally, 30 (56.6%) respondents stated the need to improve technical equipment, and 22 (41.5%) respondents stated that their future plans are to extend the conference facilities. In many cases, large purpose-built venues are built on a five to ten year planning proposal, some of the venues may be reaching the next phase of their development plan, and thus facilities will be extended in the near future to improve their conference product.

> "There is a general acceptance within purpose-built convention centres that staff is a key resource and the key to each centres success. The structure and fabric of the centres means that many compete on an equal basis. What makes them able to differentiate their product and service is the quality if their staff and how well those staff service the needs and wishes of the customer" (McCabe et al, 2000, p.82).

As such the improvement of staff training is often an on going process for many venues, with 16 (30.2%) of purpose-built venues stating they planned to improve staff training. Conference venues are increasingly seeing the importance of providing highly skilled members of staff. As competition is increasing within the conference industry, personnel skills are seen to be increasingly important. Additionally, 17 (32%) purpose-built venues identified the need to attract larger conferences and 13 (24.5%) respondents stated the need to attract overseas conferences. The British Association of Conference Destinations (1998) suggest that the U.K. conference sector could be marketed in a more dynamic way overseas, to attract more high spending overseas tourists to the U.K. Only 13 (24.5%) purpose-built venues aim to attract more overseas conferences. This suggests that the lack of overseas conferences attracted to the U.K. is still a weakness concerning The British Association of Conference Destinations SWOT analysis that was carried out in 1998.

As stated in Section 3.3 purpose-built venues are often established to revive a destination through the revitalisation of blighted areas and through the conferences they attract creating a sense of credibility to the destination. Therefore it is very important for the venue to continue to attract prestigious conferences, overseas delegates and also to attract large events to their conference destination. This is important as the local community experiences the wider economic benefits of overseas visitors and large delegate numbers as they stay in the hotels and spend money locally. The combination of improved infrastructure, well–established conference bureau's representing the major cities and the greater recognition of the value of the industry by local authorities has led to the competition among U.K towns and cities for the lucrative conference business becoming fiercer than ever. This is exacerbated by the fact that the once dominant position of the U.K. in the international arena is being challenged by new international destinations. Overseas conference destinations rather than those in the U.K. are often chosen as they offer similar or better technical support in terms of modern conference facilities and telecommunications (Lawson, 2000). This highlights even greater need for U.K. purpose-built venues to target large international conferences as competition has increased over recent years. It is apparent that the U.K. purpose-built venues need to extend their facilities to attract an international market. Moreover, 18 venues have only one plan for the future of the conference facilities. Additionally, 37 (70%) venues have between one and three future plans for their conference venues and seven (13.2%) venues have between four and six plans for the future of their conference venue.

7.6.17.2 – Future plans for hotel conference venues

Two factors were prominent in the results for hotels, in both cases, 148 (51.7%) respondents highlighted the need to improve technical equipment and improve staff training. It is interesting to identify that in the future hotels are considering expenditure for technical equipments so that they can offer a high tech conference package. It is also important for hotel facilities to recognise the importance of having specifically trained conference staff. Rather than relying on hotel staff so that they can offer a high quality service product, which is desired by conference organisers.

Fewer respondents identified the need to attracting larger conferences, extend the size of their conference facilities or to attract overseas conferences with only 86 (30%), 79 (27.6%) and 64 (22.3%) doing so respectively. Forty-one, (14.3%) respondents did not state any plans for the future of their conference facilities, whereas 173 (60.4%) respondents plan to carry out three of less of the options above. Additionally, 39 (13.6%) respondents aim to carry out four or more of the options.

7.6.17.3 – Future plans for educational establishments conference venues

For educational establishments, 18 (75%) respondents highlighted the need to improve technical equipment. For educational establishments to invest in technical facilities it is feasible in comparison to hotels, as the facilities can be used on a regular basis, not only by the conferences but the academic personnel. It is therefore more likely to see an educational establishment invest into technical facilities are they have a great demand for the use than a hotel or a visitor attraction. This was closely followed by 17 (70.8%) respondents highlighting the need to improve staff training. A marked drop in respondents identified the need to attract overseas conferences with only eight (33.3%) doing so. Only seven (29.2%) respondents suggested attracting larger conferences. Only six (25%) venues identified the need to extend the size of their conference facilities. This is probably due to educational establishment using existing lecturing facilities, which are generally large to cater for students. Therefore they already have large facilities and feel there is not need to extend.

7.6.17.4 – Future plans for visitor attraction conference venues

For visitor attractions, just over half (39 venues or 52%) of the 75 responding venues aim to extend or make major changes to their conference facilities in the future, so that they can attract a larger percentage of the conferences market. Once the visitor attractions have increased the size of their conference facilities, then they can market themselves to attract larger conferences. Additionally, 36 (48%) venues plan to improve their technical facilities, in order to attract greater numbers of conferences in the future.

Three activities received much fewer responses, that of improve training, attract larger conferences and attract overseas conferences with 29 (39%), 22 (29%) and 25 (33.3%) respectively. It is important that visitor attractions must not neglect the importance of having trained conference staff, especially if they aim to invest into technological facilities. It is important that their staff are trained to use the new conference technology. Once the visitor attraction sector reaches it consolidation phase of its life cycle then it may wish to attract larger conferences or focus on attracting international conferences. But at present the visitor attraction sector is still in its infancy and is therefore concerned with improving its existing facilities to attract conferences.

Overall the four classifications within the U.K. conference sector are positive with regards to improving both technical facilities and the training of staff. However, fewer venues have wider plans to convert or extend facilities and attracting overseas delegates. The desire to attract larger conferences is also low priority within the four industry classifications. The final section deals with the respondents views on future plans for not only the conference venue but also the industry as a whole.

7.6.18 – What are the perceived future developments within the U.K. conference sector?

Respondents were asked how they viewed the future of the U.K. conference sector, the results of which can be seen in histogram 7.35.

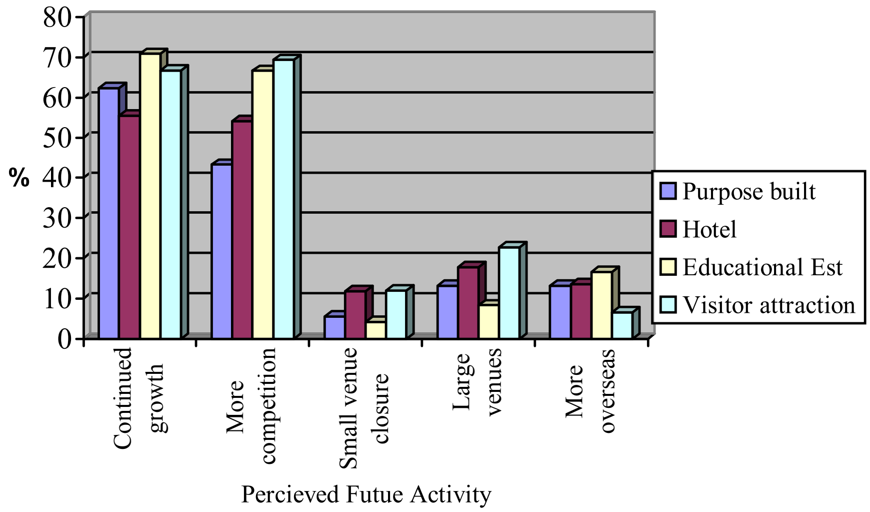


Figure 7.35 – The perceived future of the conference sector as a whole
(Purpose-built N=53; Hotels N=286; Educational Establishments N=24; Visitor Attractions N=75)

It can be seen that two factors received the greatest level of support. Overall respondents considered that the U.K. conference sector will continue to grow and that greater competition will develop. The greatest levels of confidence for growth are seen from educational establishments, with 17 (70.8%) respondents stating this is the case, while two thirds of visitor attractions also consider the U.K. conference sector to grow in the future, with 50 (66.6%) visitor attractions citing this was the case.

For purpose-built venues, 33 (62.2%) respondents thought growth would occur. Hotels exhibit the least confidence regarding future growth with 159 (55.5%) hotels responding. This research has identified that although purpose-built venues were the originators within the U.K. conference sector, visitor attractions are experiencing the greatest rates of growth in terms of venues opening and adding conference facilities during the current decade. Although respondents are positive with regards to growth, respondents from all four conference venue classifications predict the future will bring greater competition. Of the four venue classifications, purpose-built venues have the lowest number of responses for this factor, with only 23 (43.3%) respondents. The largest number of responses for this factor came from visitor attractions, with 52

(69.3%) responding venues stating the future will bring greater competition. The majority of hotels and educational establishments also perceive that competition may increase within the sector, with 155 (54.1%) and 16 (66.7%) respectively.

The subsequent three factors all exhibit considerably less support across the four venue classifications. The first is that of larger conference venues opening, in terms of delegate capacity. This factor had the greatest support from visitor attractions, with over a fifth of such venues (17 respondents or 22.7%) believing this would occur in the future. The proportion of hotels supporting this creation of larger conference venues is 51 (17.8%). For purpose-built this is seven (13.2%) responding venues and only two (8.3%) educational establishments suggested larger venues may be established in the future. As stated in Section 3.3, purpose-built venues are often seen as the 'centre piece' of a destination. It is therefore very important for purpose-built venues to continue to attract prestigious conferences, overseas delegates and also to attract large events to their conference destination. This is important as the local community experience the wider economic benefits of overseas visitors and large delegate numbers through the multiplier effect. Large conferences are prestigious for the image of the destination, as well as providing attractive financial awards (Abbey & Link, 1994; Davidson & Cope, 2002).

Few respondents felt that the future will see a closure of small conference venues. However, the greatest level of support for this factor came from hotels (34 venues or 11.8%) and visitor attractions (nine venues or 12%). Visitor attractions have also predicted the opening of larger conference facilities in the future. This view point is in relation to many visitor attractions aiming to extend their conference facilities in the near future with 16 (22.7%) visitor attractions wishing to do so. Interestingly, visitor attractions aim to attract more domestic conferences as only five (6.6%) respondents predicted a growth in attracting more overseas conferences. Once again this may suggest that visitor attractions are still in their infancy, as they are concentrating on building their domestic market before attracting international conferences. Only three (5.6%) purpose-built venues suggested that the conference sector would experience the closure of small venues in the future, while one (4.16%) educational establishment supported this view. Overall these figures suggest optimism within the U.K. conference sector.

Fewer respondents believed that the conference sector would experience an increase in the number of overseas conferences, with seven (13.2%) purpose-built venues stating they believed this would be the case in the future. Additionally, 39 (13.6%) hotels, four (16.6%) educational establishments and five (6.6%) visitor attractions also consider this to be the case. The British Association of Conference Destinations (1998) suggests that the U.K. conference sector could be marketed in a more dynamic way overseas, with the aim to attract more high spending overseas tourists to the U.K. These results are in agreement with the BACD SWOT analysis, which suggested that the U.K. does not attract very many overseas conferences.

In summary, the respondents from purpose-built venues state that the U.K. conference sector will continue to grow. However, they do see an increase in competition but do not believe they will see the closure of small venues, or the expansion of overseas markets, or the building of larger conference venues. Hotels respondents are positive about the future of the conference sector and perceive that the market will continue to growth. Respondents also perceive an increase in competition. Educational establishments also believe that the U.K. conference sector will continue to grow in the future, indeed this venue classification exhibits the greatest level of support for this factor. It also believes that competition shall increase within the U.K. conference sector. Educational establishments also exhibits the greatest level of support for attracting overseas conferences, whilst few educational establishments believe that larger venues will open or that smaller venues will close in the future. Visitor attractions exhibit the greatest support for increased competition and the creation of larger venues, whilst it has the lowest level of support for attracting overseas conferences. Overall, the two venue classifications, that of educational establishments and visitor attractions, are the most positive regarding the future of the conference sector, as they perceive continued growth and greater competition. Whilst the more established venue classifications of purpose-built and hotels are the least positive regarding the future of the U.K. conference sector, as fewer of such venues perceived continued growth.

This research accepts Hypothesis Four, that the future composition of the U.K. conference sector, as identified using forecasting techniques, is predicted to be dominated by hotels with conference facilities, supporting and extending the findings of Rogers (2003). However, it should be noted that visitor attractions are predicted to have the greatest level of growth over the current and future decade. This research has identified that they are a number of factors that explain the development of each of the venue classification and that each of these factors has been measured. These factors have been implemented to create conference facilities, along with improvements since opening and those planned in the future. However, financial constraints are present within the venue classification and such constraints are one factor that can limit the development of the venue classifications. Additionally, respondents have highlighted that a number problems exist within conference industry, in particular a lack of breakout rooms, increased competition and a reduction in the demand for conference facilities.

7.7 – Hypothesis Five: The lifecycle model can be used to explain the development of the conference sector

Chapter Two provided a detailed discussion of lifecycle models. This chapter adopts the lifecycle stages and identifies that theoretically conference venues have the potential to develop through a lifecycle from exploration to stagnation and decline or rejuvenation. The timescale in which a conference venue progresses through this lifecycle varies. The empirical findings of this research identified that purpose-built conference venues came into existence first during the early 1950s. They are still in existence today, purpose-built venues possess the longest lifecycle of the four venues classifications, followed by hotels, educational establishments and the newest lifecycle is that of visitor attractions with conference facilities.

7.7.1 – The temporal development of the purpose-built conference venues

The empirical findings of this research supports the literature which shows that purpose-built venues were the first venue classification to establish in the U.K. conference sector. Indeed the first purpose-built venues were constructed during the 1950s, refer to Table 7.85 which shows the progress through the lifecycle phases for all venue classifications. This table shall be referred to in the subsequent discussion.

Table 7.85 – Butler's life-cycle model applied to the conference sector

	1950-59	1960-69	1970-79	1980-89	1990-99	2000-09*	2010-19
Purpose-built	**Exploration** 1 (1.9%)	Involvement 5 (9.4%)	Involvement 7 (13.2%)	**Development** 19 (35.9%)	**Development** 21 (39.6%)	**Development** 34*	**Development** Consolidation 43*
Hotels	**Exploration** 4 (1.4%)	**Exploration** 17 (6%)	Involvement 51 (17.7%)	Involvement **Development** 83 (29%)	**Development** 106 (37.3%)	**Development** Consolidation (2000-2001 25 (8.6%)) 140*	Consolidation 172.9*
Educational Establishments			**Exploration** 7 (29.1%)	Involvement 8 (33.3%)	**Development** 9 (37.6%)	**Development** Consolidation 10*	Consolidation 11*
Visitor Attractions			**Exploration** 6 (8%)	Involvement 22 (29.4%)	Involvement **Development** 35 (46.6%)	**Development** (2000-2001 12 (16%)) 48*	**Development** 61*

(* indicates Holt's linear trend predicted value)

The 1950s can be classified as the ‘exploration’ stage for purpose-built venues, when related to Butler’s (1980) lifecycle model. A period in which a small numbers of delegates, visited limited facilities, which did not detract or change the destination significantly. Such venues subsequently entered the ‘Involvement’ phase in the 1960s and remained within this stage through the 1970s, with approximately 9.4% and 13.2% of respondents stating their venue opened in these decades respectively.

This stage of Butler’s Resort Lifecycle Model is characterised by public sector initiatives being undertaken by both the destination and the venue, along with a conference season being established, all of which leads to pressure to improve facilities. Throughout the 1980s and 1990s purpose-built venues continued to develop, entering the ‘development’ phase of the lifecycle model. Approximately 35.9% and 39.6% of respondents stated their venue opened during these decades respectively. During this development stage the pressure to improve facilities from the ‘involvement’ phase coming into fruition. Ultimately this phase may be characterised by increasing use of the purpose-built venue facilities, with such venues extending their original facilities with structurally changes. It is at this stage that the venue has successfully been incorporated into the destination, which may re-orientated itself focusing on conference facilities within its revenue mix and as a result the destination will market itself as a fully-fledged conference destination.

For purpose-built venues, the decades experiencing the greatest growth were that of the 1980s and 1990s, however, growth is predicted through both the current decade and subsequent decade. The findings suggest that new purpose-built venues will open throughout the U.K. within the next 20 years. It is felt that by 2020 the majority of U.K. cities and large towns will have introduced purpose-built facilities and as such this venue classification is expected to enter the ‘consolidation’ phase during the latter stages of the next decade once the majority of destinations have a purpose-built venue.

7.7.2 – The temporal development of the hotel conference venues

From Table 7.85 the number of hotels that offer conference facilities that opened in each of the post-war decades can be seen. The literature review states and the empirical data support the view that hotels were the second venue classification to enter the U.K. conference sector. With regards to this venue classification, as discussed in chapter two, domestic tourism stagnated and declined from the 1950s and 1960s. Thus, first generation hotels (i.e. those before conference facilities were added) entered Butler's 'decline' phase around the 1950s and early 1960s (Agarwal, 1997). Major steps were taken by the U.K. government to rejuvenate the domestic tourism industry, including the Development of Tourism Act (1969), refer to Section 5.6.1. This enabled diversification within many hotels, for example hotels entered the conference sector by offering conference facilities rather than relying on general visitation from tourists. Therefore those second-generation hotels, i.e. hotels offering conference facilities, entered the 'exploration' phase of Butler's model in the late 1950s and 1960s. Hotel conference venues were the second venue classification to initiate a lifecycle. The 1970s were a decade where second-generation hotels entered the 'involvement' phase, which is characterised by hotels diversifying in order to offer a conference product, often this conference product was on a small scale.

In the 1980s hotels moved from the 'involvement' phase through to the 'development' phase. Multinational chain hotels were built to complement the growing demand of conference tourism, particularly in destinations where purpose-built venues had been established. Hotels remained in this phase during the 1990s. During the current decade, the reduced ratio of hotels opening compared to the number of hotels opening conference venues has reduced. As such it is predicted that hotels may enter the 'consolidation' phase of its lifecycle. It is clear from this temporal examination of the hotels venue classification, that the introduction of a conference sector triggered the commencement of a second lifecycle within this venue classification.

7.7.3 – The temporal development of the educational establishment conference venues

Approximately two decades after the hotels entered the 'exploration' phase in the 1950s, educational establishments entered this phase in the 1970s, as shown in Table 7.85, with over a quarter of respondents stating their venue opened in this decade. Again, this is a decade in which a small numbers of delegates visited limited facilities, with the facilities themselves not detracting or changing the destination / venue significantly. Conferences were predominately offered during student vacations times, when student accommodation and lecture rooms were available. The aim was to maximise the use of the facilities all year round. During the 'exploration' phase, educational establishments often attracted academic conferences, which required the atmosphere of an educational establishment, although such venues offered basic amenities. Whereas purpose-built and hotel venues took two decades to progress through this initial 'exploration' phase, the educational establishment venue classification took only one decade. This is because educational establishments already offered many of the facilities required for a conference, as part of their primary function as educational facilities, i.e. audio-visual equipment, conference and breakout rooms. Therefore the transition through the lifecycle is quicker and as such the 1980s were a decade where this venue classification entered the 'involvement' phase of its lifecycle. Again, the pressure to improve the conference facilities, such as accommodation, increases during this phase and to offer conferences during term-time.

The 1990s were a decade in which educational establishments moved into the 'development' phase, as the number of venues in each venue classification entering the conference sector increased. In the current decade, although the absolute number of educational establishments opening is reducing, the ratio between those opening just the venue and those adding conference facilities is increasing and is the largest across all four venue classifications. As such this venue moves from 'development' to the 'consolidation' phase of its lifecycle. It is predicted that a large number of new educational establishments are unlikely to open, thus limiting the potential to offer conference facilities to existing establishments. However, existing establishments can maximise financial rewards by constructing purpose-built conference facilities on campus, in order to offer conferences all year round. Once these establishments offered conference facilities, the opportunity for new conference facilities to be opened is limited and as such during the decade 2010 to 2019, it is predicted that this venue classification shall remain in the 'consolidation' stage. It is clear from the research that educational establishments were the third venue classification to enter the U.K. conference market, behind hotels and purpose-built venue classifications. The time taken to pass through the initial stage of Butler's Lifecycle Model is much shorter for this venue classification than the previous two venue classifications.

7.7.4 – The temporal development of the visitor attraction conference venues

Visitor attractions entered the 'exploration' stage of its lifecycle during the 1970s, as shown in Table 7.85. During this decade few visitor attractions offered conference facilities, with little investment occurred with regards to the supply of conference facilities. As a result very basic facilities were supplied, although the aim was predominantly to extend the tourist season and to make use of the facilities all year round. The 1970s were the first decade that all four venue classifications existed in the U.K. conference market and thus competition for delegates increased throughout the U.K. conference market. The 1980s were a decade where both the educational and visitor attractions venue classification entered the 'involvement' phase.

The mid 1990s saw the visitor attractions move to the 'development' phase, as did the educational establishments. Again, the 1990s saw a further increase in the number venues in each venue classification entering the conference sector and as such competition also increased. It is predicted that during the current decade and subsequent decade visitor attractions will remain in the 'development' stage, as more visitor attractions have identified the benefits of offering conferences facilities to generate revenue and to maximise the use of the venue. In the current decade, the greatest rates of growth in terms of venues opening and adding conference facilities are experienced by visitor attractions.

However, as more visitor attractions enter the conference market competition increases as well. Visitor attractions need to invest heavily into the conference product to cater for the conference delegates needs. Once a company has used a particular visitor attraction, it may prove to be difficult to attract repeat visitation (Leask & Hood, 2000). As the conference organiser will chose different venues for the next conference due to the diversity of visitor attractions. There is an increasing need for the conference product offered by visitor attractions to continually evolve through improvements to attract repeat visitation.

To conclude, purpose-built venues, hotels, educational establishments and visitor attractions have entered the conference market at differing times, whilst differing rates of growth have been experienced throughout the four venue classifications. Table 7.85 suggests even though purpose-built venues entered the market place first, they are moving through their lifecycle at the slowest rate of development and are predicted to stay in the development phase for the current decade as there is still a potential to build purpose-built venues in some U.K. towns such as Bath, Liverpool and Eastbourne, which at present do not have a purpose-built conference centre. Hotels were the second venue classification to enter the market place, they have also reached the 'development' phase. The last decade has seen a continued growth within the hotel conference venue classification. However, the opening:offering ratio is actually falling for hotels. Therefore fewer hotels are offering conference facilities as a proportion of the overall hotel stock. It is therefore predicted that hotels will enter the 'consolidation' phase in the next decade. The third venue classification to enter the conference market was that of educational establishments, they are also at the development phase as many universities are constructing purpose-built venues to attract conferences all year round. However, the number of educational establishments entering the conferences market will reduce in the next decade due to few new educational establishments being constructed. It is visitor attractions that have, in the last decade, experienced tremendous growth as they diversify to offer a unique conference product. Visitor attractions have recently entered the 'development' phase of their lifecycle and in the future are likely to experience the greatest growth rates of new conference facilities opening.

The findings are in agreement with Lawson (2000, p220) in that;

> "*the conference sector is a dynamic sector. It has experienced significant changes over its relatively short lifetime. Arguably, the greatest challenges facing the sector in the next decade and beyond are likely to be concerned with maintaining growth and sustaining the benefits of investment….The next decade may see even greater changes as some destinations experience tremendous growth, some stagnate and others decline*".

7.7.5 – Quasi-linear or cyclical lifecycle of the U.K. conference sector

A traditional quasi-linear representation, as forwarded by Butler (1980) of the U.K. conference sector's lifecycle has been discussed in Section 7.7 through to 7.7.4. In Section 2.5, Russell & Faulkner (2004) forwarded a criticism of Butler's representation of a destination's lifecycle in a quasi-linear form. This criticism was based on the fact that state-changing triggers, such as entrepreneurial activity, were ignored by Butler in the latter stages of his lifecycle model. Russell & Faulkner (2004) forwarded the view that the effect of these state changing triggers was to create a cyclical representation of the destinations lifecycle, a move away from the traditional quasi-linear representation.

In Section 5.8 the relationship between refurbishments, service quality and the cyclical representation of the U.K. conference sector were discussed. In support of this view, Hypothesis One identified forwarded four venue classifications as part of a single typology to describe the U.K. conference sector. As part of this initial hypothesis the characteristics of the four venue classifications were identified, in support of the existing literature that the U.K. conference sector should not be considered homogenous. Hypothesis Two identified that the four conference venue classifications did not open at the same time, but have opened throughout the post-war period as identified in Table 7.85. Hypothesis Three identified that the refurbishment of conference venues is commonplace within the sector, although again not occurring at the same time. Refurbishments since opening have been spread throughout the 1970s, 1980s, 1990s and the first years of the current decade. Hypothesis Four identified that future refurbishment plans are also spread throughout the current decade ranging from the latter part of 2001 to 2010, but refurbishments are also taking place on a continual basis.

This research forwards the view that venue refurbishments should be considered as a state changing trigger used within the U.K. conference sector. By refurbishing, venues are anticipating what will remain attractive to delegates in the future and a venue should protect the very features that created its competitive advantage over other conference venues. Through refurbishment, the venue is not only seeking to continually meet the needs of conference planners and delegates, but in doing so, venues are both extending and rejuvenating their lifecycle as a “result of conscious, deliberate decision-making on the part of management, or “strategic lifecycle extension” (di Benedetto & Bojenic, 1993, p560), also referred to as positive planning and development (Butler, 2005). Through the initiation of a new lifecycle, the venue is thus theoretically able to pass once again through the stages of Butler’s (1980) lifecycle model. As such, although the traditional quasi-linear representation can be applied to the U.K. conference sector, today a cyclical representation of the U.K. conference sector is a more appropriate, as seen in Figure 7.36, due to continued refurbishment at differing times each venue classification is passing through its own lifecycle at its own rate. As refurbishments are rejuvenating its lifecycle each of the four venue classifications are undertaking their own cyclical development within the overall lifecycle of the U.K. conference sector.

Conference venues are considered products, just as Butler considered destinations as products. Each conference venue has a market to which they are promoted and sold. Eventually they may cease to appeal to the very market they were initially promoted to, at this point the venue is required to either change significantly (to the extreme of finding a new market), or leave the conference sector. In other words, the venue must evolve.

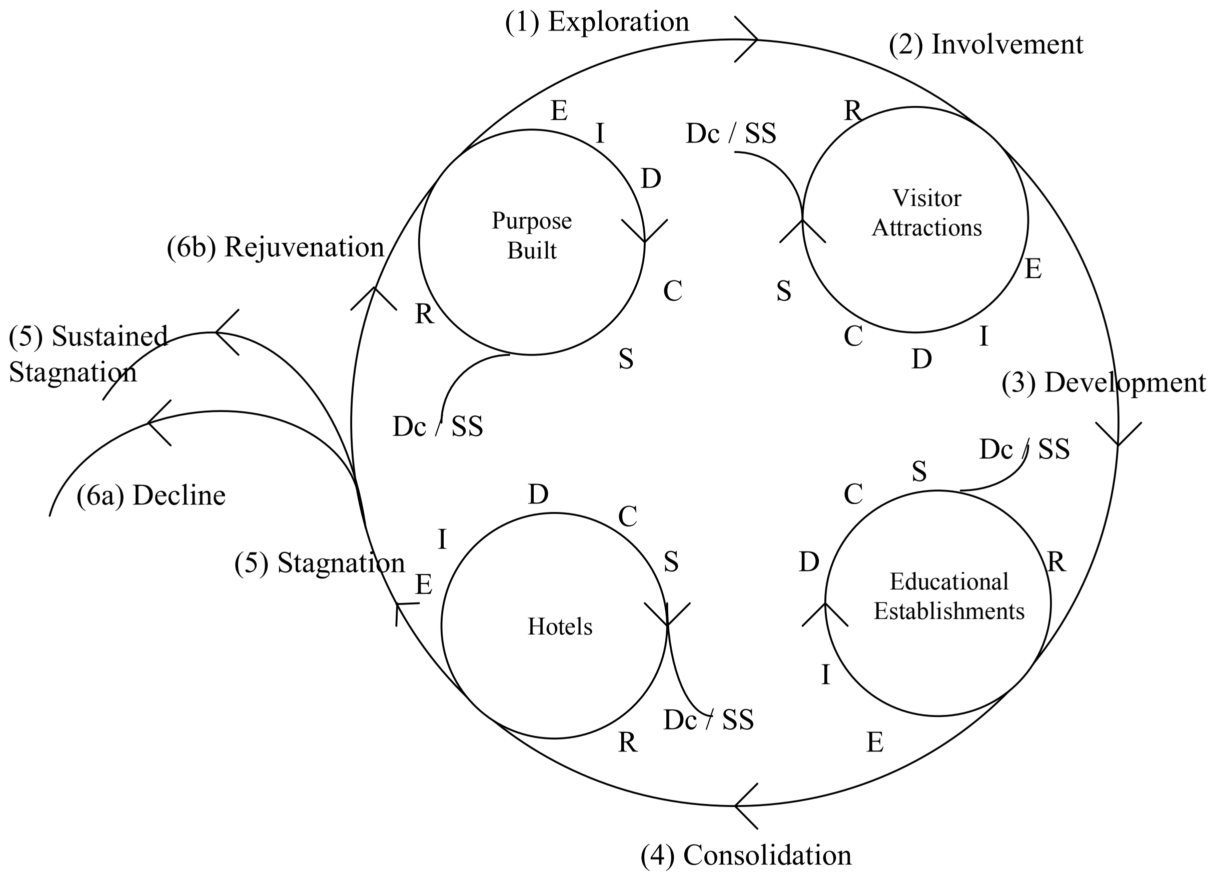


Figure 7.36 – A cyclical representation of the U.K. conference sector (adapted from Russell & Faulkner, 2004, p.563)
(E - Exploration, I - Involvement, D - Development, C - Consolidation and S – Stagnation, R – Rejuvenation, Dc - Decline and SS – Sustained Stagnation)

A fundamental problem with regards to the venue changing is that it is difficult to anticipate what will remain attractive to delegates in the future and how a venue can protect those features that create a competitive advantage for the venue. The cycle of refurbishment in order to continually appeal to existing delegates whilst attracting new delegates creates a cyclical pattern to the development of the U.K. conference sector. In summary, Figure 7.36 represents the theoretical passage of the U.K. conference sector through the varying stages of its lifecycle, these stages being forwarded by Butler (1980). As purpose-built venues are the most mature venue classification, this typology is shown as the furthest around the cyclical lifecycle in Figure 7.36. Visitor attractions have the shortest lifecycle this venue classification is shown at the start of the cyclical lifecycle. As the entire sector passes through the lifecycle stages from Exploration (1 in Figure 7.36) through Involvement (2), Development (3), Consolidation (4), Stagnation (5) so each of the venue classifications and indeed individual venues, are themselves undergoing their own development lifecycle (E - Exploration, I - Involvement, D - Development, C - Consolidation and S - Stagnation for each of the venue classification) with the refurbishment of venue facilities as the trigger in whether or not venue declines / sustained stagnation (Dc / SS in Figure 7.36) or rejuvenates (R).

Overall, as the sector passes through the stagnation stage, it can either decline or rejuvenate. Through refurbishing venues the individual venue classifications and collectively the industry passes into the rejuvenation stage. If collectively all individual venue refurbishments are sufficient to maintain a competitive edge for the U.K. conference sector, through the service quality site selection criteria as identified in Section 5.3, the U.K. conference sector will pass back in to the exploration stage and once more commence the cyclical path of its development lifecycle. If venues do not refurbish in order to meet the site selection criteria, demand is likely to fall and in-turn the venue will enter the decline stage. If collectively both individual venues and the entire venue classifications fail to continually meet conference organiser and delegate demands as the sector enters the stagnation stage, where it has the choice to decline or rejuvenate. This research accepts Hypothesis Five, that the lifecycle model can be used to explain the development of the conference sector.

7.8 – A summary of Chapter Seven

Chapter Seven has utilised the 438 valid empirical responses with regards to achieving the overall research objective, aims and hypotheses. Chapter Eight continues by drawing together these findings to draw conclusions and forward recommendations.

CHAPTER EIGHT – FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

8.1 – Introduction

Discussion continues by identifying the research findings and conclusions that can be drawn from the thesis. Recommendations for both the U.K. conference sector and also for subsequent research within this conference venue domain are also provided.

8.2 – The research findings & conclusions

With the U.K. conference sector now an important player in the global conference market (Leask & Spiller, 2002), the primary aim of this research is to provide an analysis and critique of an evolving conference industry within the U.K. from post-war to present day. In achieving the overall aim, this research has the following objectives:

1. To outline the characteristics of the different classifications of the U.K. conference sector. Additionally, this research will analyse if the existing classifications are the most appropriate to use in segmenting conference supply.
2. To identify which classification of conference venue development accounted for the most significant growth in the U.K. conference sector.
3. To outline reasons for the development of each venue classification and to explore the mechanisms used to diversify into the conference market.
4. To forecast the future development for each of the venue classifications identified.
5. To test if the lifecycle model can be used to explain the development of the U.K. conference sector.

These objectives will answer the following research hypotheses:

- Current classifications of conference venues are an appropriate way to segment venue supply (Objective One)
- Purpose-built venues were responsible for the most significant growth in the U.K. conference sector (Objective Two)
- Changes to venue facilities were economically driven (Objective Three)
- Future composition of the U.K. conference sector will continue to be dominated by hotel conference venues (Objective Four)
- The lifecycle model can be used to explain the development of the conference sector (Objective Five)

8.3 – Hypothesis One: Current classifications of conference venues are an appropriate way to segment venue supply

A review of typologies forwarded by authors since the 1990s which classified the U.K. conference sector was undertaken in Chapter Four. This review identified that many of the typologies used were inappropriate due to their lack of clear differentiations between terms employed and that they are often protracted through the use of sub-divisions. This research finding concerning changing definitions used to classify the U.K. conference sector supports the view of Crouch & Ritchie (1998) as well as Ladkin & Spiller (2002). These authors state that the reliability of data concerning the U.K. conference sector is weak, due to inconsistencies in definitions used. Moreover, these deficiencies in data collection can be corrected through the wide scale adoption of standards, including that of universally accepted definitions. This research forwards a single typology containing four venue classifications, which are not singularly new classifications. It is the authors view based upon the both the review of relevant literature that the *most appropriate way* to segment conference venue supply is through the use of a single typology containing the following four classifications;

1. Purpose-built conference venues
2. Hotels with conference venues
3. Educational establishments with conference venues
4. Visitor attractions with conference venues

By forwarding four mutually exclusive venue classifications this research aims to offer clarification on definitions used within research concerning the U.K. conference sector. Additionally, this research forwards acceptable definitions that can be universally accepted within this field of research. In undertaking empirical research in support of this hypothesis, this research has identified clear characteristics which can together be used to define each of the four classifications forward by this research. In doing so this not only fulfils Hypothesis One, but also Objective One, that of identifying the characteristics of the four venue classifications forwarded by this research to categorise the U.K. conference sector.

This thesis supports the view of many authors that the conference sector should not be considered as a homogeneous market (Pearce 1989; Weirich, 1992; Montgomery & Strick, 1995; McCabe et al, 2000; Rogers, 2003). Instead it should be considered as a number of clearly delineated classifications that interact with one another, but also with other elements of the economy as a whole. Therefore, unlike Shone (1998 p.3) who states that the conference industry is a “multimillion pound business, but it is not generally perceived as a separate entity, as its fortunes are bound up with that of the hospitality and tourism industry”, this research concludes that the U.K. conference sector is very much a clearly established entity of the U.K. hospitality and tourism industry.

With regards to the venue characteristics identified for the four venue classification, this research supports the views of Foster (1994), Lawson (1996) and Shallcross (1998). These authors stated that purpose-built venues offer the largest delegate capacities. This research concludes that at the beginning of the current decade this viewpoint still remains valid. By implication, purpose-built venues can therefore host the largest range of conferences in terms of delegate numbers, from the smallest conference to those with several thousand delegates.

In comparison hotels offer the smallest delegate capacities within the U.K. conference sector. It can be concluded that this venue classification is limited in the range of conference capacities it can offer to conference organisers and delegates. This finding supports the work of Greaves (1999) and Lawson (2000), who stated that hotels remain limited with respect to their capacity to host conferences when compared to purpose-built conference venues.

Additionally, with respect to delegate capacities, this research identifies that for educational establishments an intrinsic strength of such establishments is the number of smaller breakout rooms. With conference trends changing in favour of, as Rogers (2003, p.249) states "delegates spend less time in plenary sessions in the main auditorium and much more time in smaller groups and syndicates" and that "more and more venues are therefore having to provide up to 20 such rooms for training and interactive discussions" (Campbell, 2000, in Rogers, 2003 p.250). Therefore where educational establishments are not able to compete on overall delegate capacity, such establishments may be able to create a competitive advantage through the provision of smaller breakout rooms by using lecture rooms as conference facilities. Finally, with regards to venue capacities, the findings of this research oppose those of Leask & Hood (2000), who identified that the limited conference capacities offered by visitor attractions should be seen as a weakness. Instead this research concludes that visitor attractions possess a range of capacities, from smaller capacities offered by such venues as museums, to larger venue capacities offered by sports stadia. Overall, when taken as an average over this venue classification, the average capacities offered by visitor attractions are larger than those offered by the average hotel. It should be noted that the availability of a few large visitor attraction conference venues will skew the results. It should also be noted that visitor attractions do offer the greatest diversity in conference venue capacities within the U.K. conference sector.

This research identifies that majority of purpose-built venues do not offer overnight accommodation. However, the presence of purpose-built residential conference venues is increasing throughout the U.K. This research supports the findings of McCabe et al (2000) and Davidson & Cope (2003) who themselves identify the lack of accommodation facilities offered by this venue classification. The ability of purpose-built residential venues to compete for conferences that include an overnight stay in the destination is increasing. Thus, the potential impact on competition through the provision of overnight accommodation along with purpose-built conference facilities should not be ignored by the other venue classifications. This research also identifies that educational establishment's offer the largest number of overnight accommodation facilities by using student accommodation, supporting the findings of Lawson (2000). It can be concluded that such venues have a competitive advantage over the other venue classifications with regards the quantity of overnight accommodation offered. The findings of this research also extend the finding of Leask & Hood's (2000) SWOT analysis of visitor attractions. Accommodation facilities are restricted to historical buildings or sports stadia. Visitor attractions lack a competitive advantage with regards overnight accommodation in comparison to educational establishments and hotels.

Although this research supports the view that educational establishments offer the largest number of overnight accommodation with regards the number of rooms offered, it can be concluded from the empirical findings that educational establishments supply basic accommodation facilities. Much of the overnight accommodation offered by educational establishments can be viewed as functional. Educational establishments offer the lowest levels of provisions across all four venue classifications for telephones, satellite television, email and fax facilities along with a mini-bar in the delegate's accommodation. These findings support the work of Seeking (1996) who describes the accommodation offered by such venues as 'utilitarian'. These findings also highlight that the £200m spend on such accommodation by the BUAC (Pemble, 2002) has at the beginning of the current decade failed to lift educational establishments from its position offering the lowest level of provision for five of the six bedroom facilities examined. With regards to the greatest level of provision for accommodation facilities discussed, it can be concluded that hotels have developed a competitive advantage as hotels have the greatest level of provision for telephones, satellite television, fax facilities and a mini-bar in delegate's accommodation rooms.

This research supports Callan (1995) who identified that the accreditation schemes offered by the AA and RAC are widely employed within the U.K. hotel conference venue category. Callan (ibid) also identified that two-thirds of guests staying at three, four and five star hotels utilise a grading scheme in their hotel selection process. If educational establishments, purpose-built venues and visitor attractions can offer accommodation of at least three star accreditation, such venues will become competitors to the hotel conference product.

This research identified that with respect to the provision of conference venue facilities, visitor attractions were identified as supplying the lowest level of provision for six of the ten (60%) factors examined. These including air conditioning, temperature control, comfortable chairs, sound proofing, coffee break area and the availability of a quiet area. In terms of the highest levels of provision for conference facilities no single venue classification dominates.

Additionally, this research identified that with respect to products offered to delegates in the conference room, visitor attractions were identified as supplying the lowest level of provision for four of the six (66.7%) factors examined. These are basic conference equipment in meeting rooms, audio-visual equipment, video-conferencing and a translation service. In terms of the highest levels of provision of conference room products this research identifies that educational establishments have the highest levels for all six factors examined. Although for two factors educational establishments are equal highest. Purpose-built and hotels also provide a high level of basic equipment, along with purpose-built venues also providing translation services.

Robinson & Callan (2003) identified that both conference venue facilities, such as natural daylight, along with conference room facilities, such as the availability of audio-visual equipment, play an important role in the site selection process for conference venues. This research has identified that visitor attractions provide fewer conference facilities than the other three venue classifications. As such it can be concluded that visitor attractions currently fail to provide many of the service quality attributes that are utilised within the conference venue site selection process. In contrast, although educational establishments offer 'utilitarian' overnight accommodation, such venues offer many of the service quality attributes utilised within the venue site selection process. In many instances the number of service quality attributes provided by educational establishments often exceeds those of the other three venue categories. These results suggest that educational establishments offer the greatest number of facilities within the conference sector.

A further service quality attribute identified by Robinson & Callan (2003) was that of 'additional social activities', which forms one element of the leisure facilities attribute subset. The highest levels of provision for social events and activities are split between the three venue classifications, that of hotels, visitor attractions and educational establishments. However, purpose-built venues fail in the majority of cases to provide any social programme, tour, health facilities or beauty salons within their conference product. It can be concluded that purpose-built venues fail to provide leisure services and in failing to do so, are unable to compete with the other three venue classifications.

Conference venue site selection attributes are not limited solely to conference venue and conference room facilities. Robinson & Callan (2003) identified that the attribute set ranked first was that of 'competence', which included an efficient check-in / check-out process. Additionally, the attribute set entitled 'Service Providers' was ranked third, which includes adaptable, competent, dependable, enthusiastic, experienced and friendly staff. Thus from a demand side, Robinson & Callan (ibid) identified that a high level of service and customer orientated staff are demanded by delegates and conference organisers. Within this current empirical research, respondents from the four venue classifications were requested to rank their services. The results identified that for three venue classifications, namely purpose-built venues, hotels and visitor attractions, the provision of a high level of service and customer orientated staff was ranked first. For educational establishments this factor was ranked second. Therefore in the knowledge that a high level of service and customer orientated staff is demanded by conference organisers and delegates, it can be concluded from this research that venues within all four venue classifications *perceive* themselves as supplying a high level of service and customer orientated staff.

This research questioned conference venue suppliers, as such it is important to state this is a perceived level of quality by conference suppliers, rather than questioning the actual service consumers.

The number of full-time and part-time employees also varies within the four venue classifications. This research identified that purpose-built conference venues employ, on average, 106 full-time employees and 72 part-time employees. Research by Fenich (1992) concluded that one of the primary reasons for establishing a purpose-built conference venue in a destination was to generate employment within the local economy. This research identifies that levels of direct employment by purpose-built conference venue are relatively low. These results are lower than the findings of the PwC (2000) study, which identified an average of 157 conference employees' work in a purpose-built conference venue. Educational establishments employ the largest number of resources specifically employed to focus on conference activity. On average they employ 47 full-time and 31 part-time employees directly involved in conference activities. In comparison, some hotels and visitor attractions employ no full time and no part-time employees directly for conference activities. The implication of this is that staff directly employed within the hotel and/or visitor attraction must be reassigned to a role within the conference provision when required.

Overall respondents from the four classifications have a high level of transient employees, in terms of length of service, with the majority of hotel employees ceasing their employment in less than three years. It can be concluded that there are staff issues, first the accumulation of staff with conference specific skills may be difficult. Secondly, once staff has been trained, their retention is often short lived within hotel venues. The majority of respondents from visitor attractions leave their position to seek new employment in less than four years. For educational establishment, the majority of respondents remain in their positions up to five years. The majority of purpose-built respondents remain employed in their current position the longest, at over five years.

This research identifies the characteristics of conference delegates across the four venue classifications. On average, there are 116 delegates per conference organised by an association, 79 delegates per corporate conference and 77 delegates per for government conference. These findings differ from the British Conference Market Trends Survey (1999) survey which identified lower numbers of average delegates for association, corporate and government conferences, at 79, 39 and 47 respectively. This research shows that not only do association conferences attract the largest average number of delegates, the conference length is also the longest, at 1.7 days. Whereas government conferences are the shortest at 1.3 days and corporate conferences last on average 1.4 days. It can therefore be concluded that association conferences have on average, both the longest conference duration and the greatest number of delegates. The implications for attracting association conferences to a destination are clear, with a greater duration of stay in the destination and a larger number of delegates, financial benefits are thus theoretically greater for a destination when an association conference is held.

This research identified the similarities and differences between the demands placed upon hotel venues in respect to delegates and non-delegates. This research identifies that conference delegates demand single rooms, staying for a single night on a bed & breakfast basis. Whereas non-delegates prefer double or twin rooms, staying predominantly at weekends on a bed & breakfast or full board basis. The difference in the cost of accommodation charged by hotels is the key differential identified within this research between delegates and non-delegates. Over one third (35.3%) of respondents stated they charged non-delegates a discounted rate. Whereas the greatest proportion (28.7%) of respondents stated they charged delegates the full hotel rack rate. In terms of actual cost, when comparing the full rack rate, conference delegates pay 11.5% more than non-delegates on average, £123.35 compared to £110.62 respectively. When discounted rates were offered, delegates were charged on average 37.4% more than non-delegates, £96.63 compared to £70.39 respectively. Where discounts were given, non-delegates received an average discount of 20.7% and conference delegates an average discount of 15.7%. Due to the variety of rates and discounts identified, hoteliers were asked to provide the average value which they charged delegates and non-delegates, results identified that conference delegates were charged on average 23.2% more than non-delegates, £100.13 compared to £81.28 respectively.

The implications for accommodation cost charging are clear. Where single occupancy overnight accommodation with breakfast facilities is plentiful, along with sufficient resources to clean and launder rooms on a daily basis, then the cost charged to delegates can be increased to above that charged to non-delegates. These findings, that delegates are on average charged more than non-delegates, are important findings for hotels. As greater economic benefits through increased revenues can be obtained if hotels offer accommodation as demanded by conference delegates.

Reviewing the relevant literature with regards to the typology and classifications used to categorise the U.K. conference sector, has provided sufficient evidence to reject Hypothesis One, that the current classifications of conference venues are not an appropriate way to segment venue supply. Instead this research forwards a single typology with four classifications which are deemed more appropriate to categorise the U.K. conference sector at the start of the current decade. Through the identification of four distinct venue classifications, this research has also identified many similarities and differences in the four venue classifications. By identifying the characteristics of the four venue classifications, this thesis has also achieved the first objective of research.

8.4 – Hypothesis Two: Purpose-built venues were responsible for the most significant growth in the U.K. conference sector

This research has identified that the differing venue classifications did not enter the conference market at the same time. This research shows that the first purpose-built conference venue was constructed in the early 1950s. However, it was not until the 1970s, 1980s and 1990s that significant growth was experienced within purpose-built venues. In comparison hotels offering conference facilities opened in the later half of the 1950s. Empirical findings identified that the number of hotels offering conference facilities increased at a slower rate than purpose-built venues through the 1950s (1.4% compared to 1.9% respectively) and 1960s (6% compared to 9.4% respectively). Moreover, growth in the number of hotels being built exceeded that of purpose-built venues during the 1970s (17.7% compared to 13.2% respectively), although the growth in purpose-built venues once again exceeded hotels during the 1980s (29% compared to 35.9% respectively) and 1990s (37.3% compared to 39.6% respectively).

This research identified that educational establishments were the third venue classification to enter the U.K. conference sector in the 1970s, which was two decades after hotels entered the conference market place. Indeed the growth rate for this venue classification exceeded that of both purpose-built and hotel conference venues during the 1970s. It has also been identified that educational establishments had the greatest number of venues adding conference facilities, as a proportion of such venues opening, in the 1990s for every one educational establishment opening, a further 4.5 added conference facilities.

Visitor attractions were the last of the four venue classifications to enter the U.K. conference sector and have experience significant growth. A limited number of visitor attractions such facilities entered the conference market in the 1970s. The growth within this venue classification increased over subsequent decades. Visitor attractions experienced the greatest growth rates, in terms of venues opening conference facilities, during the 1990s, at 46.6%. Indeed, for the 1990s, the growth rate for this venue classification is the highest for any of the four venue classifications, exceeding the growth rate of purpose-built venues. This finding suggests that the greatest number of visitor attractions have entered the U.K. conference sector in the last decade.

This research has identified that purpose-built venues were both the originators of the U.K. conference sector and precursor to the development of other venue classifications. As such they were responsible for the significant growth in terms of establishing the U.K. conference sector. Therefore, Hypothesis Two is accepted and Objective Two is also answered. However, growth in other venue classifications has at varying times throughout the post-war period exceeded that of purpose-built venues. During the 1970s growth in hotels and educational establishments exceeded that of purpose-built venues and during the 1990s the growth in visitor attractions also exceeded the growth rate of purpose-built venues.

8.5 – Hypothesis Three: Changes to venue facilities were economically driven

The findings show that the questionnaire responses identified that purpose-built venues were the first to be created and established in response to perceived and actual market demand. Purpose-built venues were also responsible for the initial growth within the U.K. conference sector. The majority of the three other venue classifications view the provision of conference facilities as a secondary activity, i.e. added after the venue was opened for its original purpose. Thus they entered the conference market at a later date. The findings show that the primary reason why hotels, educational establishments and visitor attractions entered the U.K. conference sector was primarily in order to generate an additional revenue source with the aim of diversify their product mix. Indeed, the top three reasons cited by visitor attractions were all economically motivated. These being to generate an additional revenue source, to subsidise income for the upkeep of buildings and to move from a single revenue stream to multiple revenue streams. It can therefore be concluded from this research that for the majority of hotels, educational establishments and visitor attractions, the addition of conference facilities to their core business activities is economically motivated. Whereas purpose-built venues were created in response to demand, rather than any financial motivation and thus the primary driver for establishing such venues was not economically motivated.

This research identified that the majority of hotels, educational establishments and visitor attractions created conference facilities through the utilisation of unused space and refurbishments of existing facilities. These finding supports the view of Leask & Hood (2000) who identified that the addition of conference facilities is attractive as it simply utilises empty space. Although for hotels the empirical data identifies that structural changes were also undertaken.

With regards to refurbishments undertaken to conference venues since opening, the majority of venues have undertaken some degree of refurbishment. These findings show that the upgrading of furnishings and décor of the venue and accommodation are commonplace throughout the U.K. conference sector. This supports the view of Lawson (2000) who stated that the quality of the interior, including general fixtures and fittings along with comfort, colour and warmth should all be considered during the refurbishment of a venue.

For hotels, although structural changes took place to create conference facilities, the number of hotels undertaking structural changes since opening has halved to 60 (37.5%) venues. Moreover, the level of cosmetic refurbishment has risen since the conference venue opened. This differs from both educational establishments and visitor attractions that experienced more cosmetic changes to create conference facilities. Subsequent to opening such facilities the amount of structural refurbishment in the form of converting or extending the venue has increased, although the upgrade of furnishings and décor is still the principle refurbishment activity. This is particularly the case for educational establishments, which exhibit the highest levels across the four venue classifications in support for the upgrading of furnishing and décor. However, as discussed in Section 8.3, this research identifies that educational establishments still offer the lowest level of provision for overnight accommodation tangibles that are demanded within the venue selection process.

It can be concluded that for hotels the initial work to establish conference facilities involved greater effort and expense in the form of structural changes and subsequently cosmetic changes. Educational establishments and visitor attractions focused on cosmetic changes to create conference facilities. Only after the conference facilities were opened did educational establishments and visitor attractions subsequently increase the level effort and expense through structural changes. It should be noted that educational establishments by their very nature already possess lecture rooms and breakout rooms created as learning spaces and therefore in many cases only require cosmetic changes in order to appeal to the conference market.

Across all four venue classifications, this research has identified that the most popular decade in which refurbishment took place was the 1990s. From Table 7.85 in Section 7.7, it can be seen that the 1990s is the first decade in which over 37% of respondents from each of the four venue classifications stated they opened conference facilities, thus competition within the U.K. conference sector grew by over one third in the 1990s. This finding suggests that the U.K. conference sector has experienced an increase in competition, which also supports the views of Robinson & Callan (2003) who identified that the U.K. conference sector has experience rapid expansion over the last decade. In light of this increased competition, this research identified the primary reasons why venues refurbished since opening. Venues cited factors including the updating of décor, improving technical facilities, keeping pace with customer demands, modernisation, conference facilities were seen to be out-dated and to provide a higher standard of service and comfort. It can be concluded that refurbishment activities undertaken since the conference venue opened, were carried out in order to maintain the venues competitive advantage within U.K. conference sector. Additionally, refurbishments also enabled venues to keep pace with the demands of conference organisers and delegates. This finding is in agreement with Chetwynd (2001, p.41) who stated that “it is important that venues upgrade and keep in tune with what the market is looking for”. This research also identifies that at the start of the current decade the primary problem encountered by hotels, educational establishments and visitor attractions is that of increased competition from conference facilities. This factor is ranked second for purpose-built venues and the concern regarding the lack of breakout rooms is ranked third by respondents.

In conclusion, the addition of conference facilities to their core business activities is economically motivated for the majority of hotels, educational establishments and visitor attractions. Whereas purpose-built venues were created in response to demand, rather than any financial motivation. Thus the primary driver for establishing such venues was not economically motivated. Hypothesis Three is partially accepted, for hotels, educational establishments and visitor attractions, but is rejected for purpose-built venue. Conference facilities were created by the conversion of unused space, along with refurbishment of unused space. During the 1990s increased competition has resulted in the refurbishment of conference venues so that venues remain competitive. Objective Three, that of outlining the reasons for the development of each venue classification and to explore the mechanisms used to diversify into the conference market, has been satisfied.

8.6 – Hypothesis Four: Future composition of the U.K. conference sector will continue to be dominated by hotel conference venues

Through the use of double exponential smoothing and Holt's linear trend forecasting, this research has predicted that the number of hotels, educational establishment and visitor attractions being built for their primary use will continue to rise. The rate of growth for establishing purpose-built venues is predicted to be 64% over the current and future decade. Furthermore, the growth rate for hotels, educational establishments and visitor attractions adding conference facilities is also predicted to rise over the current and future decade. The growth in hotels adding conference venues is predicted to rise 23% over this period and in absolute numbers of conference venues hotels are predicted to remain the dominant venue classification in the U.K. conference sector. The growth in educational establishments adding conference facilities is predicted to rise by 47.1% over the current and future decade and for visitor attractions, the growth in conference facilities being added is predicted to be 76.1% over the same period. The future composition of the U.K. conference sector is therefore predicted to remain dominated by hotels offering conference facilities. However, visitor attractions are predicted to have the fastest growth rate over the current and subsequent decade.

In identifying the future trends with regards to the opening of conference venues within the U.K. conference sector, this research also forecast the future development for each of the venue categories identified. For purpose-built and hotel conference venues less than 50% of responding venues plan to undertake future refurbishment. For educational establishments and visitor attractions the majority of responding venues state they do plan to undertake some degree of refurbishment in the future. Therefore venues within the two classifications with the shortest lifecycles (educational establishments and visitor attractions) are predicted to experience the greatest change in the future by upgrading and improving their conference product.

This research identifies that cosmetic changes to furnishings and décor are planned across the four venue classifications, suggesting the need to keep up-to-date with changes in fashion. With regards to purpose-built venues there is a decline in all six refurbishment activities when comparing the level of refurbishment undertaken since opening to that planned for the future. The greatest decline is seen in the investment of modern conference equipment. Whereas the lowest level of decline is seen for undertaking structural changes through the conversion or extension of the venue.

Hotels were the only venue classification that did not rank improvements to furnishings and décor as their top two future refurbishment activities. Instead refurbishments to improve health and safety along with the installation of modern conference equipment are now the top two refurbishment activities planned for the future. For educational establishments, four of the six refurbishment activities declined when the level of future implementation is compared with the level of refurbishment undertaken to create the conference facility. However, upgrading furnishings and décor do remain the most common refurbishment activity planned for the future, with installing modern conference equipment and improving disabled access also common across this venue classification. For visitor attractions upgrading furnishing and décor are ranked first and second for future refurbishment activities, followed by converting and extending as well as the installation of modern conference equipment.

It can therefore be concluded that although future refurbishment through cosmetic changes are common across the U.K. conference sector, each venue classification is focusing on differing refurbishments activities for the future. For purpose-built venues, focus is on the conversion or extension of the venue. For hotels health and safety issues dominate. For educational establishments modern conference equipment and disabled access are the focus, while visitor attractions are similar to purpose-built venues in their focus on converting and extending their venues, but also the installation of modern conference equipment are commonplace. Visitor attractions have the greatest number of changes planned for the future.

This research also identifies that the majority of future refurbishments are planned in the first half of the current decade (up to and including 2004). For each of the four venue classifications, the rationale for future refurbishments is exactly the same as that cited for undertaking refurbishment since opening. This rationale is to update the décor for purpose-built venues, hotels and educational establishments, whereas visitor attractions aimed to improve technical facilities. For purpose-built venues, as stated in Section 8.5, a lack of breakout rooms and conference facilities is their primary concern as they enter the current decade. In response to this, the need to increase meeting room capacities is cited by purpose-built venues as their second most popular reason for future refurbishment. With more venues predicted to open within the U.K. conference sector and thus competition increases, it can be concluded that future refurbishments, as well as those undertaken since the venue opened are done so to maintain a competitive advantage within the conference sector.

Although venues aim to create a competitive advantage through refurbishment, this research identifies that future refurbishment for both purpose-built and educational establishments are financially constrained. If such financial constraints prevent refurbishments that are required to create or maintain a competitive advantage, the venues ability to be competitive may also be reduced. Activities such as installing modern conference equipment, upgrading furnishing and décor along with converting or extending the venues are all cited by the U.K. conference sector as activities that are financial constrained.

This research also identifies that improvements to technical facilities and to a lesser extent the improvement of training for conference related staff are future priorities within the U.K. conference sector. Across the sector venues do not consider attracting larger conferences or indeed overseas conferences as part of their future plans, suggesting that the four venue classifications within the U.K. conference sector may be focusing on smaller domestic conferences in the future. Respondents were also questioned on their perception regarding the future of the

U.K. conference sector. It can be concluded that respondents perceive continued growth and as a consequence, greater competition in the future. Few respondents consider that smaller venues will close or that the U.K. conference sector will increasingly attract overseas conferences. Not only have forecasting techniques been used to predict the future composition of the U.K. conference sector and thus satisfying Hypothesis Four, but also the future development for each of the venue classifications has been identified, thus satisfying the fourth objective of this research.

8.7 – Hypothesis Five: The lifecycle model can be used to explain the development of the conference sector

This research identified that the conference sector is a non-homogenous product and that its constituent venue classifications developed at differing times. Purpose-built venues were the pioneering venue classification followed by other venue classifications. Theoretical similarities can therefore be drawn between the conceptual framework of Butler's Lifecycle Model and the lifecycle of a conference venue. In Table 7.85, the stages of Butler's Lifecycle Model have been applied to the four venue classifications through the post-war period and predicted to 2020.

This research has shown that all four venue classifications have initiated their lifecycle at different times and all are subsequently moving forward through their lifecycle, where today they are at differing stages. For purpose-built venues the 1950s can be classified as that of the 'exploration' stage, when related to Butler's (1980) lifecycle model, as only a small number of venues existed (refer to Table 7.85). Purpose-built venues move into and remained within the 'Involvement' phase during the 1960s and 1970s as the number of such venues grew from one in the 1950s to seven opening in the 1970s within the U.K. Such venues subsequently entered the 'development' phase in the 1980s as rapid growth in such venues occurred throughout the U.K. This venue classification is progressing through its lifecycle at the slowest rate of any of the four venue classifications, as it commenced its lifecycle in the 1950s. It is predicted to stay in the 'development' phase for the current decade as there is still a potential to build purpose-built venues in some U.K. towns such as Bath and Eastbourne, which at present do not have such venues. It is predicted that between 2010 and 2019 that this venue classification may move into the 'consolidation' phase as by this date the majority of towns and cities may have already constructed a purpose-built venue.

With regards to hotels, it is clear from the temporal development of this venue classification, as discussed in Section 7.7.2, that the introduction of purpose-built venues triggered the commencement of a second lifecycle within this venue classification. The first lifecycle developed from the initial offering of overnight accommodation to non-delegates to its decline in the 1950s and early 1960s due to the development in mass tourism in Europe resulting in U.K. hotels closing down. Hotels offering conference facilities entered the 'exploration' phase in the 1950s and 1960s, with 1.4% and 6% of hotel respondents opening in these decades respectively (refer to Table 7.85 in Section 7.7.1). This venue classification subsequently moved to the 'involvement' phase in the 1970s as growth in this venue classification increased. In the 1980s hotels moved on from the 'involvement' phase to enter the 'development' phase, where it is predicted that they will remain for the current decade. For the decade 2010 to 2019 it is predicted, based upon the level of growth identified by forecasting techniques that this venue classification shall enter the 'consolidation' phase, as the proportion of hotels offering conference facilities slows.

Educational establishments which offered conference facilities entered the 'exploration' phase during the 1970s. The 1980s being the decade where such venues entered the 'involvement' phase and the 1990s witnessed these venues moving into the 'development' phase, as the number of venues in each sector entering the conference sector increases. In the current decade, which is largely predictive, this venue classification may move from the 'development' phase to the 'consolidation' phase. It is predicted for the decade 2010 to 2019 that this venue classification may remain in the 'consolidation' phase, as the number of educational establishments opening is low. Hence there is a limit to the number of educational establishments that can offer conference facilities. It is clear from this research that educational establishments were the third sector to enter the conference market, behind the hotels and purpose-built venues. The time taken to pass through the initial stages their lifecycle is much shorter for this venue classification than for purpose-built venues and hotels.

The 1970s saw visitor attractions which offered conference facilities enter the ‘exploration’ stage, with the 1980s being a decade where they moved to the ‘involvement’ phase. Furthermore, the 1990s saw the visitor attraction venues move from the ‘Involvement’ phase to the ‘development’ phase, while the current decade and the predicted decade of 2010 to 2019 may see such venues remain in this stage. Visitor attractions are therefore the last to enter the conference sector.

The application of Butler's (1980) lifecycle models to the U.K. conference sector, as discussed above, has followed Butler’s traditional quasi-linear representation (refer to Section 7.7 through to 7.7.4). In Section 2.5, Russell & Faulkner (2004) criticised Butler’s representation of a destination’s lifecycle for being quasi-linear. This criticism was based on the fact that entrepreneurial activity defined as a state-changing trigger, was ignored by Butler in the latter stages of his lifecycle model. Russell & Faulkner (2004) forwarded the view that the effect of these state changing triggers was to create a cyclical representation of the destinations lifecycle, a move away from the traditional quasi-linear representation. In Section 5.8 the relationship between refurbishments, service quality and the cyclical representation of the U.K. conference sector were discussed. This research forwards the view that venue refurbishments should be considered as another state changing trigger, similar to Russell & Faulkner (2004) entrepreneurial activity, which occurs within each of the four U.K. conference sector venue classifications. Hypothesis Three identified that the refurbishment of conference venues is commonplace within the sector, although not occurring at the same time. Refurbishments since opening have been spread throughout the 1970s, 1980s, 1990s and the first years of the current decade. Hypothesis Four identified that future refurbishment plans are also spread throughout the current decade ranging from the latter part of 2001 to 2010, but refurbishments are also undertaken on a continual basis. Through refurbishment, the venue is not only seeking to continually meet the needs of conference planners and delegates, but in doing so venues are both extending and rejuvenating their lifecycle as a "result of conscious, deliberate decision-making on the part of management, or "strategic lifecycle extension" (di Benedetto & Bojenic, 1993, p560). Through the initiation of a new lifecycle, the venue is thus theoretically able to pass once again through the stages of Butler's (1980) lifecycle model. As such, although the traditional quasi-linear representation can be applied to the U.K. conference sector, today a cyclical representation of the U.K. conference sector is more appropriate, see Figure 7.36.

8.8 – Recommendations for the U.K. conference sector

1. The four venue classifications should accept that the U.K. conference sector is not a homogeneous product. Each of the four classifications are in competition with each other within the overarching U.K. conference sector. However, each of the four venue classifications differs in characteristics and therefore each classification has the ability to market itself to distinct demands within the overall sector. Each of the venue classifications should therefore focus on satisfying demands from specific niches within the overall conference sector.
2. Purpose-built venues should examine the provision of overnight accommodation where hotel and other sleeping room stock is not able to support the conference activity. As stated purpose-built residential venues are increasingly common. The provision of such accommodation would reduce the reliance of this sector on external factors and would in itself be an additional revenue source for this venue classification.
3. When establishing overnight accommodation specifically for delegates, such stock should be designed with the delegate in mind. There should be sufficient single occupancy rooms, whether this is double or twin rooms let as singles or single bed rooms, to cater for all delegates on-site. The venue should employ sufficient resources in order that rooms can be serviced on a daily basis as delegates often stay just a single night. As such there will be a high degree of turnover in rooms and a high demand on the accommodation resources. Delegates also demand full board basis and as

such the accommodation should also provide catering facilities that are able to offer such board basis.

4. Educational establishments should further improve their accommodation stock to at least the level of a three star hotel. This includes the improvement of general furnishings and décor, along with the provision of en-suite bathroom facilities and international direct dial telephones to attract conference delegates. Although it is accepted that may have financial repercussions with regards student accommodation fees during term-time.
5. Venues that offer overnight accommodation should look towards achieving some degree of accreditation for this accommodation. With accreditation playing an increasing role in the venue selection process of conference organisers, those without accreditation may not create a competitive advantage.
6. Visitor attractions being the newest venue classification to enter the U.K. conference sector, has the greatest work to do with regards the services and facilities offered. This classification should accept this fact and continue to improve both the conference room, such as the ability to attain blackouts in conference rooms, but also improve the level of provisions supplied to delegates, such as audio-visual equipment.
7. The conference sector should acknowledge that the overall conference product should extend beyond the core 9am to 5pm agenda. An incentive package should include evening events and entertainment so that a total conference product can be offered to delegates.
8. The industry should acknowledge that with the proliferation of venues, conference organisers have numerous venues to select from, each of which may offer sufficient resources. However, it is the high level of service quality, in the form of service provider's competence that will differentiate venues from their competitors and gain repeat visitation.
9. In offering this high level of service and customer-oriented staff, training is essential. The U.K. conference sector should continue to train staff involved in the offering of conferences in order maintain these high levels of service and customer-oriented staff. All venues should have specifically trained conference staff in order to provide a high service quality product.

10. There should be a continued recognition that conference delegates are prepared to pay approximately 25% more for overnight accommodation than non-delegates. Those venues not offering accommodation to conference delegates should consider the economic benefits in terms increased revenue that can be stimulated by offering such accommodation.
11. It is important for all venues to take note concerning the need to regularly update their conference facilities. Due to increase competition and in order to remain competitive, it is important to offer attractive, modern facilities with accommodation designed with the conference organiser in mind. It is important for the conference venue to continually reinvent itself, to be creative and to improve the conference package.
12. The style of the conference is also evolving and changing, from the traditional uses of auditoriums to the more interactive conference where delegates break out into smaller syndicate rooms. Therefore smaller breakout rooms should be provided by conference venues in the future.
13. The majority of purpose-built venues and hotels with conference facilities stated they do not plan any future refurbishments. These two venue classifications should not be complacent with regards to the continually improving and modernising their conference product in order to maintain a competitive advantage. Venues such as educational establishments and especially visitor attractions are still developing their conference product. Therefore require major refurbishment programmes in the future to improve their existing standard of the conference facilities.
14. The future continues to look positive for the U.K. conference sector, with continued growth in the supply of conference facilities. However, this research concludes that with the expansion of both the quantity and size of conference centres, there is a danger that too many centres will be established leading to over capacity within the conference sector. In agreement with Murray (1995, p.16) who asks "when will the bubble burst?"
15. Those venues that do not regularly improve their conference facilities may be the first conference venues to experience a sustained reduction in demand for their conference product. The future will see the survival of the

strongest venues. Some venues will need to cease operating so that the strong, well-equipped venues can succeed in the conference market place.

8.9 – Research limitations and recommendation for future research within the U.K. conference sector

Both financial and time constraints applied to this research, as such it is accepted that this research has a number of limitations.

8.9.1 – Supply-side factors

The primary limitation of this research is that it focuses only on supply-side factors of the U.K. conference sector. A recommendation for future research is that both demand from customers and supply from providers are examined together. In doing so, not only will subsequent research identify what conference venue suppliers are providing, but also what is demanded by conference delegates and conference organisers. Future research will be able to achieve a gap analysis, identify whether there is a 'gap' between what is demanded by users and what is supplied by venues within the U.K. conference sector.

In order to obtain data concerning both supply and demand factors two questionnaires will be required. In order to obtain demand side data questionnaires will need to be distributed to conference delegates and conference organisers. Supply side data would be collected by the use of questioning conference venue suppliers, such as that used for the current research.

8.9.2 – Questionnaire limitations

The questionnaire used within this research also had limitations. There is a need for qualitative research concerning research instruments prior to the design of the questionnaire resulting in greater critique of the questionnaires form and content, such qualitative study was undertaken by and recommended by Robinson & Callan (2001). However, as stated in Section 1.4.3 there is a lack of existing academic research in the sector to reference, with academic research increasing form the 1980s (Ladkin & Spiller, 2001). The most recent overviews are from Rogers (1998; 2003), Lawson (2000), McCabe et al (2000), Weber & Chon (2002) and Davidson & Cope (2003). Research that is drawn upon in order to establish questionnaires concerned with the U.K. conference sector predominantly stems from Western Europe, the U.S. and Australia (Ladkin & Spiller, 2001; Spiller, 2002). However, critics of this academic research state that it is fragmented and difficult to compare both temporally and spatially (Dwyer & Mistilis, 1999b).

The length of the questionnaire, in terms of the number of questions included, was considered too long by some respondents. It is therefore recommended that the number of questions be halved from approximately 50 to approximately 25 by narrowing the focus of future research to specific themes in comparison to this current research. Rather than examine numerous aspects of the U.K. conference sector, such as service quality, venue capacities, refurbishments undertaken and future plans as contained within this research, it is recommended that future research limits its focus to fewer aspects, i.e. each of the specific themes listed is a questionnaire within its itself. In doing so the number of questions required in the distributed questionnaire should also be reduced. Additionally, questions concerning historical data and financial data were not widely completed across the survey population, and this may have de-motivate some respondents from completing the questionnaire. Future research would not incorporate questions concerning historical or financial data in order to aid the completion of the questionnaire. Additionally, the last two questions within the questionnaire were left opened ended for respondents to provide free form answers. A low response rate was obtained to these questions, and thus it is recommended that open ended questions be removed from future research in favour of closed questions.

8.9.3 – Support from leading authority

Another limitation to this research is that prior to the dissemination of the questionnaires no support from a leading authority, such as the BACD, was obtained. It is recommended that future research obtains such support from a recognised authority within the U.K. conference sector and in doing so the questionnaire response rate may improve.

8.10 – Research aim, objectives and hypotheses; a reflection

This thesis has achieved its primary aim of providing an analysis and critique of an evolving conference industry within the U.K. from post-war to the present day. In doing so it has addressed the objectives and hypotheses as stated in Section 1.3. This research identifies that the U.K. conference sector has indeed evolved and expanded during the post-war period, to a position now at the start of the 21st century whereby competition within the sector has intensified. Venues are increasingly looking at ways to differentiate themselves from their counterparts in order to maintain a competitive advantage and continue to attract both new conference delegates and repeat visitations. Many venues within the U.K. conference sector have made positive steps in continually achieving a competitive advantage through service quality improvements and refurbishments. The recommendations made within this research, if implemented, will enable venues across the U.K. conference sector to continually evolve over time and remain competitive in an ever increasingly competitive U.K. conference sector.

APPENDIX A

Table 3.5 – Positive responses to the economic, social and environmental consequences of stagnation and decline by destinations through the introduction of a conference venue

Context	**Consequence**	Findings & author
Economic	**Public / private investment**	Upgrading / re-establishment of accommodation, construction / renovations of infrastructure (Nelson, 1996). Development of conference facilities and productivity at the local level (Go, Govers & Vliegenthart, 2002).
	Contribution to destinations income	The economic prosperity conferences generate for a destination is indisputable (Greaves, 1998a). U.K. conference duration is on average 1.6 days (British Tourist Authority, 1998). Each day in a destination delegates spend in excess of £100, with a further £100-£200 channelled into accommodation (Greaves 1998a; Business Tourism Partnership, 2003). *Examples* Edinburgh ICC generated over £17 million for the local area in 2001 and over £90 million since opening (Edinburgh International Conference Centre Ltd, 2002). Harrogate received £139.6m from business tourism in 1999 and £70m from general tourists (Yorkshire Tourism Board, 2003). Delegates spend additional days in host destination (Braun 1992). Majority of delegates travel with spouse and/or family (Meeting & Conventions 1988 cited in

		Braun 1992).
	Contribution to destination employment	Delegate numbers and expenditure used to derive estimated value for jobs created (Braun, 1992; Law, 1993). *Examples* Birmingham ICC estimated to generate a further 1959 jobs for the local economy (Saunders 2002). Edinburgh ICC estimated to generate almost 1,000 additional jobs within the local economy (Munro, 1994). Sports venue conferences generate high levels of employment (Facility Management cited in PwC, 2000). Employment for skilled and unskilled members of the local community within many sectors (Janarius, 1991).
	Stabilisation of tourist flows	Conferences held in 'shoulder months' of the tourism season, helping to prolong the revenue-generating season for a destination (Business Tourism Partnership, 2003; British Tourist Authority, 2002). Reduced number of conferences held in primary holiday periods (July / August / Christmas / New Year) due to staff taking their annual vacations (Astroff & Abbey, 1991). Conference business less seasonality, compared to general tourism, enabling better planning

		and utilisation of tourism infrastructure (Kulendran & Wilson, 2000b). Seasonal pattern makes the conference business particularly attractive to seaside resorts (Law 1993) *Example* Edinburgh ICC built to ‘bring business life to Edinburgh’s traditionally bleak winter months between November and March’ (Tarpey, 1996 p.64).
Social	**Improved destination image**	Undertaking a prestigious conference may result in a considerable amount of credibility (Rogers 1998) Conferences produce an array of publicity, promotion and increases public relations advertising as well as exposure for the destination and the region, delegates become unpaid ambassadors (Davidson & Cope 2002) Potential repeat visitors advertise with word of mouth (Abbey & Link 1994)
	Increase number of local attraction for use by locals	Benefits filter down throughout society quicker than they do for most other industries (Law, 1993) “communities are willing to subsidise construction and operation of conference centres” (Nelson, 1996, p.145)
Environmental	**Revitalisation**	Often the aim of revitalisation using a conference venue as the centrepiece is to create an

	of blighted area	image of a vibrant urban centre that will improve the social conditions of the local community such as creating employment opportunities (Business Tourism Partnership, 2003). *Example* In Birmingham, the ICC was built to regenerate the region, which suffered decline due loss of manufacturing industry, by acting as a catalyst for growth for the regions retail, hotel and leisure sectors. As a result it generated £1.5 billion of public and private investment within the city, as well as attracting 1.5 million people to the city in its opening year, including 120,000 delegates attending more than 360 conferences and seminars (Bowie 1991). Birmingham's NEC venue generated over £711 million in visitor expenditure per annum. Birmingham has pioneered the use of conference centres to regenerate its city, it now has 70 conference hotels (Waight, 2002). Bournemouth Council realised a "degree of economic diversification which complemented, rather than detracted from, the existing qualities of the resort" was required (Soane, 1993). Diversified through the construction of the Bournemouth International Conference (BIC) centre (Morgan, 1994). Hotels, accepted the destinations move towards a mixture of both seasonal and conference

		tourism and introduce facilities demanded by conference delegates, such as en suite bathrooms, (Morgan, 1994). This BIC revived Bournemouth as a destination generating economic benefits for local businesses in excess of £50 million per year (Bournemouth Borough Council, 2003). Additional revenue flowing into the local economy invariably leads to the upgrading and expansion of the tourism infrastructure, such as improvements in the hotel stock in order to supply higher standard accommodation as expected by conference delegates (Lawson, 2000).

Table 3.6 – Negative responses to the economic, social and environmental consequences of stagnation and decline by destinations through the introduction of a conference venue

Context	**Consequence**	Findings & author
Economic	**Increased Competition**	Conference sector is becoming increasingly competitive (Vogt et al, 1994), Increased competition comes the possibility that supply may exceeding demand (Murray 1995). Conference organisers can bargain for lower rental rates (Nelson 1996). The marketing reality of the 1990s has made large venues recognise that in today's highly competitive environment they cannot afford to ignore any potential markets (Letich, 1991). 'business is tough and the competition for meetings has become intense' (Crystal, 1992 p.84).
	Sphere of influence small	Most conference delegates "meet, eat and sleep under one roof – the venue" (McCabe et al, 2000, p.21)
	High costs involved	Development and operating costs of a conference venue varies considerably, between 1991 and 1997 the cost of conference venue construction ranged from £6 million to £180 million (Scarborough Borough Council 1998).

		Although by introducing a conference sector the destination may develop a high quality product, the economic viability of building a conference venue is reduced in today's competitive climate as the lavishness and size of conference venues has increased the cost of construction considerably (Nelson, 1996). Refurbishment and / or extension costs can occur once the centre has been opened. For example Bournemouth's BIC cost £18 million to construct and £5 million to extend (Candal, 1989). Many conference venues operate at a deficit, with few facilities meeting operating expenses from revenues (McGuinness, 1982). The average venue in the US loses US$2.36 million when debt service is considered, whilst one third achieves break even or better performance, none have profits greater than US$2.5 million (Fenich, 1995).
Social	**Resident attitudes remains negative**	Resident's attitudes either remain or return to resignation (Rogers, 2003).
Environmental	**Carrying capacity exceeded**	Social and environmental disruption within a destination is inevitable (Rogers, 2003).

APPENDIX B

Table 4.1 – Differing typologies used to classify the U.K. conference sector

Weirich (1992, p.15)	Montgomery & Strick (1995, p.4)	McCabe et al (2000, p.191)	Lawson (2000, p.57)	Venue Directory (2002, p.3)	Davidson & Cope (2003, p.27)	Rogers (2003, p.97)
1. Hotels 2. Conference centres 3. Resorts 4. Universities 5. Community centres 6. Exhibition halls 7. Cruise ships	1. Hotels 2. Conference centres 3. Resorts 4. Convention centres 5. Limited service hotel 6. Non-traditional	1. Residential Resort hotels Airport hotels CBD/Suburban hotels Boutique hotels Residential centres Colleges / universities Cruise ships 2. Non-residential Purpose-built Exhibition halls Theatres Arenas & Stadiums 3. Special venues Historic buildings Museums & Zoos Sporting venues	2. Purpose designed Conference venue Multi-use auditoria 3. Adapted use Convention hotels Function rooms Theatres Concert halls Public halls Universities Colleges Arenas 4. Occasionally used Libraries Art galleries Museum Stadia	1. Hotels 2. Purpose-built 3. Universities 4. Miscellaneous / unusual	1. Hotels 2. Conference centres 3. Academic 4. Residential conference centre 5. Unusual	1. Hotels 2. Purpose-built 3. Colleges, universities, academic 4. Civic 5. Unusual

APPENDIX C

Figure 6.9 – The growth and development of U.K. conference venues questionnaire

The Growth and Development of U.K. Conference Venues

The questionnaire has ten parts:
1) General information
2) Type of conference facilities offered
3) Type of events and number of delegates
4) Number of employees
5) The opening of the conference facilities
6) Renovation to the conference facilities
7) Future plans to renovate the conference facilities
8) Ownership and funding
9) Finance
10) Future plans

Please read the instructions at the beginning of each section. Most of the questions simply require you to tick the box(es) opposite your answer. The other questions simply require a short written explanation of no more than 15 words or conference data. The questionnaire will take approximately 20 minutes to complete.

The results of this survey will be disseminated through a variety of sources, however, may I reassure you that you and your organisation will remain anonymous.

Thanking you in advance for your co-operation.

Please return the completed questionnaire to:

Julie Spiller,

International Centre for Tourism & Hospitality Research,

School of Service Industries

Bournemouth University

PO Box 2816

Poole, Dorset BH12 5YT

Telephone 01202 595223. Fax 01202 595228

Part One *General Information*

Please answer these questions in terms of your job over the last 12 months. If you have been in your current job for less than 12 months please base your answers on your current job.

1. **Respondent's job title.**

❑ Director ❑ Conference Manager ❑ General Manager ❑ Accountant ❑ Other, please state……..…………

2. **How long have you worked at the establishment?** ………………………years

Part Two *Type of Conference Facilities Offered*

Part two aims to identify the general characteristics of your conference facilities. Please answer the questions by ticking the appropriate boxes. Question four requires the size of conference rooms to be entered and question ten requires percentages of conference bookings to be entered.

3. **Please select the type of conference venue that most matches yours?** (✓ more than one box if applicable).

❑ Purpose-Built Convention Centre (specifically built to host conferences)
❑ Multi-Purpose (civic & community halls, used for many other events)
❑ Residential Conference Centre (devoted to conference market offering space for employees to learn)
❑ Airport Convention Centre
❑ Urban Convention Centre
❑ Rural Convention Centre
❑ Beach Resort Convention Centre
❑ Other, please specify…………………………………………………………

4. **What is the size of the conference facilities?**

Theatre style, capacity of largest meeting room	m^2	
Conference venue maximum capacity of delegates	Seated	Not-seated
Exhibition space; maximum exhibition space	m^2	
Number of additional meeting rooms	Boardrooms	Classrooms
Banqueting capacity of largest room	m^2	
Banqueting maximum capacity of delegates	Seated	Not-seated
Total floor space	m^2	
Accommodation: number of bedrooms (if applicable)		

5. Hotel bedroom facilities for conference delegates. (✓ more than one box if applicable).
   - ❑ Telephone
   - ❑ Fax
   - ❑ E-mail
   - ❑ Satellite TV
   - ❑ Mini Bar
   - ❑ Desk and writing material

6. **Facilities featured in conference venue** (✓ more than one box if applicable).

   - ❑ Sound insulation in conference rooms
   - ❑ Blackout attainable in conference rooms
   - ❑ Good acoustics
   - ❑ Air conditioning
   - ❑ Temperature control
   - ❑ Natural lighting
   - ❑ Comfortable chairs
   - ❑ Sound-proof conference rooms
   - ❑ Separate coffee-break area
   - ❑ Quiet environment
   - ❑ Tiered amphitheatre

7. What products are offered to delegates? (✓ more than one box if applicable).
   - ❑Basic equipment (including OHP, white board & flip charts)
   - ❑ Audio-visual equipment
   - ❑ Technical support
   - ❑ Translation services
   - ❑ Video-conferencing facilities
   - ❑ Convention bureau
   - ❑ Other, please specify……………………………………………………

8. **What catering facilities are offered?** (✓appropriate box).

   - ❑ In-house catering services
   - ❑ Contracted in catering services

9. **What type of events / activities do you offered to delegates, e.g. tours** (✓ more than one box if applicable).

   - ❑ Type of social programme. E.g. tour of local area
   - ❑ Tour of attraction/conference facility
   - ❑ Corporate games
   - ❑ Bar(s)
   - ❑ Leisure activities

- ☐ Health facilities, swimming pool, work-out room. sauna, steam-room
- ☐ Beauty salon or other beauty facilities
- ☐ Banquet / Receptions / Functions
- ☐ Other, please specify……………………………………

10. **What percentage of conference reservations is made directly with the venue or through a conference organiser?**

Directly with the venue	*%*
Through a professional conference organiser, or a venue finding agency	*%*

11. **Please rank your conference services in order of importance, 1 being the most important and 11 the least important**.

- ☐ The conference venue provides a wide range of meeting capacities
- ☐ The conference venue provides high-tech facilities
- ☐ A conference bureau service is provided
- ☐ Excellent communication links provide easy access to the conference venue
- ☐ The convention centre has in-house accommodation / approved local hotel accommodation
- ☐ There is a high level of service and customer-oriented staff
- ☐ There are sufficient local attractions to entertain delegates outside conference hours
- ☐ The appeal is the availability of a tour of the venue as part of the social programme
- ☐ The conference venue has a unique experience
- ☐ The conference venue has a unique atmosphere
- ☐ Other, please specify. …………………………………………………

Part Three *Type of Events and Number of Delegates*

Part three is designed to collect statistics about the type of events held at your conference venue. Please read the notes below to clarify terms before answering the questions.

Conference - For the purpose of this study a conference has been defined as an out of office meeting of at least six hours duration (including meals) involving a minimum of eight people. Also including conventions, & conferences with exhibits.

Trade and public exhibitions, with or without seminars, including employment fairs, product launches and fashion shows.

Performance/Entertainment events - concerts, variety shows, theatre.

Banquet/reception functions - galas, banquets, dinner parties and receptions.

Other events - graduation ceremonies prize giving, miscellaneous

Association-professional groups; trade unions; societies; clubs; political parties; charities- primarily non-profit bodies & organisations.

Government - national/local government; local authority sponsored meetings; public enquiries, university and school organised events.

Corporate ***- company meetings; training courses; annual general meetings; board meetings; sales meetings; product launches***

12. ***Please indicate the number of activities, which took place at your conference venue in the year 2000***

	Conferences / Business Meetings	Public Exhibitions / Trade Shows	Performances / Entertainment	Banquets / Functions / Receptions	Other e.g. Ceremonies
Spring					
Summer					
Autumn					
Winter					
Total					

13. ***Please indicate the number of events that took place in the years 1997-1999 and offer a projection for 2001***

Total Number of Events	1997	1998	1999	**2001 projection**
Conferences / Business Meetings				
Public Exhibitions / Trade Shows				
Performances / Entertainment				
Banquet / Receptions / Functions				
Other e.g. Ceremonies				

13. ***What are the general characteristics of the conference delegates?***

Type of Event	Average Daily Spend of Delegate	Average Number of Delegates	Average Length of stay of Delegate	% of Delegates who are Local	% of Delegates who are Non-Local
Association					
Corporate					
Government					

Part Four *Number of Employees*

Please answer the questions in part four in terms of the number of employees who work in the organisation as a whole and the number of employees who work specifically in the convention venue.

15. **Please estimate the total number of employees in your organisation as a whole.**

Full-time ……………**part time** …………….employees

16. **Please estimate the total number employees who are employed by *the conference venue alone.***

Full-time……………**part time**……………employees

Part Five *The Opening of the Conference Facilities*

Please answer the questions in this part in terms of the reasons for opening the convention venue.

17. **In what year did the conference venue open?** …...…………..

18. **What were the primary reasons for constructing the convention venue?** (✓ One box for each factor). **1**=highly significant: **3**=significant: **5**=not significant

Factor	1	2	3	4	5
Due to central government investment					
Due to local government investment					
Due to private sector investment					
To attract high levels of delegate spending					
To increased employment opportunities					
To generate economic gains for the local community					
To increase hotel bookings and occupancies					
Enhanced urban image					
Redevelopment of blighted areas					
To meet market demand					
Based on estimated demand					
Due to consecutive poor tourist seasons in terms of visitor numbers					
Aim to attract business in off-peak times					
Other towns/destinations have added conference facilities					
Other, please specify…………..					

19. **Please specify the costs incurred in building the conference facilities?** £………...……………..

Part Six *Renovation to the Conference Facilities*

Please answer the questions in this part in terms of renovation which may have taken place since the conference venue has opened. The aim is to identify whether or not the conference venue is regularly changing and updating its facilities, or whether no change has taken place since the venue opened.

20. **Have any *changes been made* (such as refurbishment or extensions) to the facilities or venue *since* the conference centre opened?** (If answered **No** go to part seven).

❑ **Yes** ❑ **No**

21. **In what year did this refurbishment or extension take place?** …………..…………..

22. **Please list the three primary reasons for the changes**

1) ……………………………………………………………………………….
2) ………………………………………………………………………………
3) ..…………………………………………………………………… ……………

23. **What was the nature of such refurbishment or extensions?**

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify……………………………………………………….

24. **What costs were incurred during the refurbishment or extension of the conference facilitie**s? £………..………

Part Seven *Future Plans to Renovate the Conference Facilities*

Please answer the questions in this part in terms of future plans to renovate the conference facilities. The aim is to identify whether or not the conference venue is regularly changing and updating its facilities, or whether no change has taken place since the venue opened.

25. **Are there any future plans to refurbish or to extend the conference facilities?**

❑ **Yes** ❑ **No** (If answered **No,** go to question **28)**.

26. **The future plans to extend/refurbish the conference facilities will take place during which year?**

20..…

27. **Please list the three primary reasons for the changes.**

1) ….……………………………………………………………………………
2) …………………………………..……………………………………….……………
3) …….……… ………………………………………………………………

28. **Please specify nature of the refurbishment / extension for the *future plans*.**

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify……………………………………………………….

29. **What is the proposed budget for the *future plans*?**

£..…………………………………………………………………………

30. **Does the conference centre need refurbishment, expansion and / or improvements that cannot be undertaken due to financial constraints?**

❑ **Yes** ❑ **No** (If **No** please continue from question **32**)

31. **What development would be undertaken if financial constraints were not present?**

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify……………………………………………………….

32. **To your knowledge has the conference venue encountered any of the following problems in the running of the facilities?** (Please rank in order of severity of problems, 1 being the most severe and 10 the least severe).

❑ Operating problems
❑ Reduced demand for conference facilities
❑ Lack of break-out rooms / facilities
❑ Lack of technical equipment
❑ Lack of trained staff
❑ Insufficient conference lead times
❑ Difficulty of attracting repeat meetings / delegates
❑ Increasing costs
❑ Increased competition from other conference facilities
❑ Other, please specify……………….

Part Eight *Ownership And Funding*

Please answer the questions in this part in terms of the ownership and funding of the conference venue. The aim is to identify whether or not your conference venue is publicly or privately owned and what grants or subsidies does the conference venue receive?

---

33. **Who owns the conference venue?**

❑ Public Authority ❑ Private Ownership ❑ Joint Ownership ❑ Charity ❑ Other, please specify …………

34. **Does the conference venue receive any form of subsidy or grant?**

❑ **Yes** ❑ **No** (If answered **No** go to question **39**).

35. **What is the source of the subsidy or grant?**

	Yes (✓)	No (✓)	Amount in £	Single, one off payment (✓)	Multiple, continuous Payments (✓)
Central Government					
Local Government					
EC Regional grants					
Lottery funding					
Millennium commission funding					
Tourism board funding					
Other, please specify ……..……………………....					

36. **Please state the *specific name* and *year* of the funds received**

Name……………………………………**date**..…………...
Name……………………………………**date**……………...…
Name……………………………………**date**…………….
Name……………………………………**date**……………....…

37. **Is the conference centre reliant upon such grant(s) or subsidy(ies) for its continued operation and success?**

❑ **Yes** ❑ **No** (If answered **No** go to question **39**).

38. **If yes, please ✓ the level of relevance in the table below**.

Highly dependent	Dependent	Average	Not dependent	Not dependent at all

38. **If the venue is *privately funded,* who pays for the refurbishment?**
………………………………………………………………………………………

Part Nine *Finance*

Part nine aims to identify the general financial characteristics of your conference facilities

40. **What was the total *net profit* for the conference venue for the financial year 1999/2000?**

£……………………………………………………………………………………

41. **What was the *increase or (decrease)* in net profit over the previous financial year (1998/1999)?**
……………………………………………………………………………………**%**

42. **For recently opened venues, what is the projected net profit to be generated from the conference facilities for this financial year?**

£…………………………………………………………………………………

Part Ten *Future Plans*

Part ten aims to identify the future plans for your conference facilities

43. **What do you have planned for the future of your convention facility?**

❑ Extend facilities ❑ Improve technical equipment
❑ Improve staff training ❑ Attract larger conventions
❑ Attract overseas conferences ❑ Other, please specify…………

44. **In your opinion, how do you see the future of the conference market in general?**

❑ Continued growth ❑ Increased competition
❑ Closures of small venues ❑ Building of larger venues
❑ Increased overseas market ❑ Other, please specify ………….……..

45. **Why do you think there has been significant growth in the purpose-built convention centres industry as a whole?**

…………………………………………………………………………………………
…………………………………………………………………………………………
…………………………………………………………………………………………

46. **Any further comments.**

…………………………………………………………………………………………
…………………………………………………………………………………………
…………………………………………………………………………………………

Figure 6.10 – The growth and development of U.K. hotels with conference venues questionnaire

The Growth and Development of U.K. Hotels with Conference Venues

The questionnaire has eleven parts:
1) General information
2) Type of conference facilities offered
3) General tourist questions
4) Type of events and number of delegates
5) Number of employees
6) The opening of the conference facilities
7) Renovation to the conference facilities
8) Future plans to renovate the conference facilities
9) Ownership and funding
10) Finance
11) Future plans

Please read the instructions at the beginning of each section. Most of the questions simply require you to tick the box(es) opposite your answer. The other questions simply require a short written explanation of no more than 15 words or conference data. The questionnaire will take approximately 20 minutes to complete.

The results of this survey will be disseminated through a variety of sources, however, may I reassure you that you and your organisation will remain anonymous.

Thanking you in advance for your co-operation.

Please return the completed questionnaire to:
Julie Spiller,
International Centre for Tourism & Hospitality Research,
School of Service Industries
Bournemouth University
PO Box 2816
Poole, Dorset BH12 5YT
Telephone 01202 595223. Fax 01202 595228

Part One *General Information*

Please answer these questions in terms of your job over the last 12 months. If you have been in your current job for less than 12 months please base your answers on your current job.

1. **Respondent's job title.**

❑ Director ❑ Conference Manager ❑ General Manager ❑ Accountant ❑ Other, please state……..…………

2. **How long have you worked at the establishment?** ………………………. years

Part Two *Type of Conference Facilities Offered*

Part two aims to identify the general characteristics of your conference facilities. Please answer the questions by ticking the appropriate boxes. Question five requires the size of conference rooms to be entered and question eleven requires percentages of conference bookings to be entered.

3. **What is the nature of the hotel?** (✓ more than one box if applicable)

❑ Rural Hotel
❑Urban Hotel
❑ Chain Owned Hotel
❑ Independently Owned Hotel
❑ Modern Hotel
❑ Traditional Hotel
❑ Airport Hotel
❑ Beach Resort Hotel
❑ Other, please specify………………………………………………………

4. **Please state the hotel rating**

AA……….. RAC……… Other……………………..

5. **What is the size of the conference facilities?**

Theatre style, capacity of largest meeting room		m^2
Conference venue maximum capacity of delegates	Seated	Not-seated
Exhibition space; maximum exhibition space		m^2
Number of additional meeting rooms	Boardrooms	Classrooms
Banqueting capacity of largest room		m^2
Banqueting maximum capacity of delegates	Seated	Not-seated
Total floor space		m^2
Accommodation: number of bedrooms		

6. **Hotel bedroom facilities for conference delegates** (✓ more than one box if applicable).

- ❑ Telephone
- ❑ Fax
- ❑ E-mail
- ❑ Satellite TV
- ❑ Mini Bar
- ❑ Desk and writing material

7. **Facilities featured in conference venue** (✓ more than one box if applicable).

- ❑ Sound insulation in conference rooms
- ❑ Blackout attainable in conference rooms
- ❑ Good acoustics
- ❑ Air conditioning
- ❑ Temperature control
- ❑ Natural lighting
- ❑ Comfortable chairs
- ❑ Sound-proof conference rooms
- ❑ Separate coffee-break area
- ❑ Quiet environment
- ❑ Tiered amphitheatre

8. **What products are offered to delegates?** (✓ more than one box if applicable).

- ❑ Basic equipment (including OHP, white board & flip charts
- ❑ Audio-visual equipment
- ❑ Technical support
- ❑ Translation services
- ❑ Video-conferencing facilities
- ❑ Convention bureau
- ❑ Other, please specify………………………

9. **What catering facilities are offered?** (✓appropriate box).

- ❑ In-house catering services
- ❑ Contracted in catering services

10. **What type of events / activities do you offered to delegates, e.g. tours** (✓ more than one box if applicable).

- ❑ Type of social programme. E.g. tour of local area
- ❑ Tour of hotel/conference facility
- ❑ Corporate games
- ❑ Bar(s)

- ❑ Leisure activities
- ❑ Health facilities, swimming pool, work-out room. sauna, steam-room
- ❑ Beauty salon or other beauty facilities
- ❑ Banquet / Receptions / Functions
- ❑ Other, please specify. …………

11. **What percentage of conference reservations is made directly with the venue or through a conference organiser?**

Directly with the venue	*%*
Through a professional conference organiser, or a venue finding agency	*%*

12. **Please rank your conference services in order of importance, 1 being the most important and 11 the least important**.

- ❑ The conference venue provides a wide range of meeting capacities
- ❑ The conference venue provides high-tech facilities
- ❑ A conference bureau service is provided
- ❑ Excellent communication links provide easy access to the conference venue
- ❑ The convention centre has in-house accommodation
- ❑ There is a high level of service and customer-oriented staff
- ❑ There are sufficient local attractions to entertain delegates outside conference hours
- ❑ The appeal is the availability of a tour of the hotel as part of the social programme
- ❑ The conference venue has a unique experience
- ❑ The conference venue has a unique atmosphere
- ❑Other, please specify. ……………………………………………………

Part Three *Hotel Visitor Questions*

Part three aims to identify the general characteristics of the tourist in comparison with conference delegates that stay at your hotel. Please answer the questions by ticking the appropriate boxes. Questions 13, 14 and 18 require figures.

13. **What are the general characteristics of the tourists which stay at your hotel?**

Average Daily Spend of Tourist within your Hotel	Average Cost of Accommodation per Night for Tourist	Peak Month(s) of Tourist Trade
£	£	

14. **What percentage of conference delegates are day visitors** …………………………………%

15. **What is the typical duration of stay at the hotel for tourists and conference delegates? (Please ✓ the appropriate box for general tourist and the convention delegates).**

Length of Stay	**Tourists**	**Convention delegate**
One night		
Weekend		
Midweek break		
Week holiday		
Fortnight		
Longer that 2 weeks		

16. **What type of accommodation does a tourist or a conference delegate usually book?**
(Please ✓ the appropriate box for tourist and the convention delegates)

Type of Accommodation	**Tourists**	**Convention delegate**
Single room		
Twin room		
Double room		
Family room		
Exclusive suite		

17. **What type of accommodation and food does a tourist or a conference delegate usually book?**
(Please ✓ the appropriate box for general tourist and the convention delegates)

Accommodation + Food	**Tourists**	**Convention delegate**
Room only		
Bed and Breakfast		
Half board		
Full board		

18. **What is the usual price a tourist or a conference delegate will pay for accommodation?**
(Please ✓ the appropriate box for general tourist and the convention delegates)

Accommodation Costs	**Tourists**	**Convention delegate**
Full rack rate		
Normal		
Discounted		
On average, what percentage of discount is offered	………………%	…………………… %
Please state average cost per night £s	£	£

19. **What is the most typical use of services required by a tourist or a conference delegate?**

20.
(Please ✓ the appropriate box for general tourist and the convention delegates)

Use of Services:	**Tourists**	**Convention delegate**
Room service		
Laundry		
Telephone		
Fax		
Computer/internet		
Secretarial work (typing of letters)		
Message posting		

21. **What is the most typical style of food ordered by a tourist or a conference delegate?**
(Please ✓ the appropriate box for general tourist and the convention delegates)

Food	**Tourists**	**Convention delegate**
Bar snacks		
Restaurant		

22. **Does the tourist or delegate use transport or tours which are provided by the hotel? (Please ✓ the appropriate box for tourist and the convention delegates)**

Tours & Transport	**Tourists**	**Convention delegate**
Tours organised by hotel		
Transport organised by hotel		

Part Four *Type of Events and Number of Delegates*

Part four is designed to collect statistics about the type of events held at your conference venue. Please read the notes below to clarify terms before answering the questions.

Conference - For the purpose of this study a conference has been defined as an out of office meeting of at least six hours duration (including meals) involving a minimum of eight people. Also including conventions, & conferences with exhibits.
Trade and public exhibitions, with or without seminars, including employment fairs, product launches and fashion shows.
Performance/Entertainment events - concerts, variety shows, theatre.
Banquet/reception functions - galas, banquets, dinner parties and receptions.
Other events - graduation ceremonies prize giving, miscellaneous
Association-professional groups; trade unions; societies; clubs; political parties; charities-primarily non-profit bodies & organisations.
Government - national/local government; local authority sponsored meetings; public enquiries, university and school organised events.
Corporate ***- company meetings; training courses; annual general meetings; board meetings; sales meetings; product launches***

22. **When are conventions held?**

❑ All year round ❑ Only during off peak season

23. ***Please indicate the number of activities, which took place at your conference venue in the year 2000***

	Conferences / Business Meetings	Public Exhibitions / Trade Shows	Performances / Entertainment	Banquets / Functions / Receptions	Other e.g. Ceremonie s
Spring					
Summer					
Autumn					
Winter					
Total					

24. ***Please indicate the number of events that took place in the years 1997-1999 and offer a projection for 2001***

Total Number of Events	1997	1998	1999	**2001 projection**
Conferences / Business Meetings				
Public Exhibitions / Trade Shows				
Performances / Entertainment				
Banquet / Receptions / Functions				
Other e.g. Ceremonies				

25. ***What are the general characteristics of the conference delegates?***

Type of Event	Average Daily Spend of Delegate	Average Number of Delegates	Average Length of stay of Delegate	% of Delegates who are Local	% of Delegates who are Non-Local
Association					
Corporate					
Government					

Part Five *Number of Employees*

Please answer the questions in part five in terms of the number of employees who work in the hotel *as a whole and the number of employees who work specifically in the convention venue.*

26. **Please estimate the total number of employees in the hotel as a whole.**

Full-time ……………**part time** …………….employees

27. **Please estimate the total number employees who are employed by *the conference venue alone.***

Full-time……………**part time**……………employees

Part Six *The Opening of the Conference Facilities*

Please answer the questions in this part in terms of the reasons for opening the convention venue.

28. **In what year did the hotel open?** ………………….........………

29. **Was your hotel built and opened at the *same time* as the dedicated conference facilities?** If **No** please continue from question **30**. If **Yes** continue from question **31**.

❑ Yes ❑ No

30. **In what year were the *conference facilities* subsequently added and opened?**
………………..........………..

31. **What are the reasons for creating / supplying your conference facilities?**
(✓ one box for each factor).
1=highly significant: **3**=significant: **5**=not significant.

Factor	1	2	3	4	5
To generate an additional revenue source					
To spread the risk from a single revenue stream to multiple revenue streams					
To subsidise income for the upkeep of the buildings.					
Due to changes in funding systems, such as a decrease in central and local government funding					
Aim to broaden revenue mix.					
In response to market demand					
Estimated demand					
Due to an increase in competition for leisure spend which has resulted in many hotels having to generate more revenue.					
Aim to attract business in off-peak times					
Due to consecutive poor tourist seasons in terms of visitor numbers					
Other hotels have added conference facilities					
To attract repeat visitation					
Other please specify					

32. **Please specify the costs incurred in building the conference facilities?**
£………………………….

Part Seven *Renovation to the Conference Facilities*

Please answer the questions in this part in terms of renovation which may have taken place since the conference venue has opened. The aim is to identify whether or not the conference venue is regularly changing and updating its facilities, or whether no change has taken place since the venue opened.

33. **Were your conference facilities added;** (✓ more than one box if applicable).

❑ To utilise unused space
❑ By converting rooms

34. **Were refurbishments or extensions carried out in order to create conference facilities?**
If **yes** please continue from question **35** If **no** please continue from question **36.**

❑ Yes ❑ No

35. **What was the nature of such refurbishment or extensions?**

- ❑ Upgrade existing rooms by improve the standard of furnishings
- ❑ Upgrade existing rooms by improve the standard of decor
- ❑ Comply with Health and Safety Regulations
- ❑ Install modern conference equipment
- ❑ Convert or extend existing facilities to provide more meeting or breakout rooms
- ❑ Provide disabled access / facilities
- ❑ Other, please specify…………………………………………………….

36. **Have any *changes been made* (such as refurbishment or extensions) to the facilities or venue *since* the conference centre opened?** (If answered **No** go to part eight).

❑ **Yes** ❑ **No**

37. **In what year did this refurbishment or extension take place?**

........……………..

38. **Please list the three primary reasons for the changes**

1) …………………………………………………………………………………

2) ……..……………………………………………………………………………

3) ..…………………………………………………………………………………

39. **What was the nature of such refurbishment or extensions?**

- ❑ Upgrade existing rooms by improve the standard of furnishings
- ❑ Upgrade existing rooms by improve the standard of decor
- ❑ Comply with Health and Safety Regulations
- ❑ Install modern conference equipment
- ❑ Convert or extend existing facilities to provide more meeting or breakout rooms
- ❑ Provide disabled access / facilities
- ❑ Other, please specify…………………………………………………….

40. **What costs were incurred during the refurbishment or extension of the conference facilitie**s?

£………..…………………………………………………………………………

Part Eight *Future Plans to Renovate the Conference Facilities*

Please answer the questions in this part in terms of future plans to renovate the conference facilities. The aim is to identify whether or not the conference venue is regularly changing and updating its facilities, or whether no change has taken place since the venue opened.

41. **Are there any future plans to refurbish or to extend the conference facilities?**

❑ **Yes** ❑ **No** (If answered **No,** go to question **46)**.

42. **The future plans to extend/refurbish the conference facilities will take place during which year?**

20...…

43. **Please list the three primary reasons for the changes.**

1) ……………………………………………………………………………………
2) ……………………………………………………………………………………
3) …….………………………………………………………………………….

44. **Please specify nature of the refurbishment / extension for the *future plans.***

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify……………………………………………………….

45. **What is the proposed budget for the *future plans*?**

£..……………………………………………………………………

46. **Does the conference centre need refurbishment, expansion and / or improvements that cannot be undertaken due to financial constraints?**

❑ **Yes** ❑ **No** (If **No** please continue from question **48**)

47. **What development would be undertaken if financial constraints were not present?**

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify……………………………………………………….

48. **To your knowledge has the conference venue encountered any of the following problems in the running of the facilities?** (Please rank in order of severity of problems, 1 being the most severe and 10 the least severe).

- ❑ Operating problems
- ❑ Reduced demand for conference facilities
- ❑ Lack of break-out rooms / facilities
- ❑ Lack of technical equipment
- ❑ Lack of trained staff
- ❑ Insufficient conference lead times
- ❑ Difficulty of attracting repeat meetings / delegates
- ❑ Increasing costs
- ❑ Increased competition from other conference facilities
- ❑ Other, please specify……………

Part Nine *Ownership and Funding*

Please answer the questions in this part in terms of the ownership and funding of the conference venue. The aim is to identify whether or not your conference venue is publicly or privately owned and what grants or subsidies does the conference venue receive?

---

49. **Who owns the conference venue?**

❑ Public Authority ❑ Private Ownership ❑ Joint Ownership ❑ Charity ❑ Other, please specify …………

50. **Does the conference venue receive any form of subsidy or grant?**

❑ **Yes** ❑ **No** (If answered **No** go to question **55)**.

51. **What is the source of the subsidy or grant?**

	Yes (✓)	No (✓)	Amount in £	Single, one off payment (✓)	Multiple, continuous Payments (✓)
Central Government					
Local Government					
EC Regional grants					
Lottery funding					
Millennium commission funding					
Tourism board funding					
Other, please specify ……..……………………...					

52. **Please state the *specific name* and *year* of the funds received**

Name……………………………………**date**..…………...
Name……………………………………**date**……………...…
Name……………………………………**date**…………….
Name……………………………………**date**……………...…

53. **Is the conference centre reliant upon such grant(s) or subsidy(ies) for its continued operation and success?**

❑ **Yes** ❑ **No** (If answered **No** go to question **55)**.

54. **If yes, please ✓ the level of relevance in the table below**.

Highly dependent	Dependent	Average	Not dependent	Not dependent at all

55. **If the venue is *privately funded,* who pays for the refurbishment?**
……………………………………………………………………………………

Part Ten *Finance*

Part ten aims to identify the general financial characteristics of your conference facilities

56. **What was the total *net profit* for the *hotel and conference venue* for the financial year 1999/2000?**
£……………………………………………………………………………………

57. **What was the *increase or (decrease)* in net profit for the hotel & conference venue over the previous financial year (1998/1999)?**
…………………………………………………………………….……………**.%**

58. **What proportion of the 1999/2000 net profit was generated by the conference venue alone?**
……………………………………………………………………………………**.%**

59. **What proportion of the *previous* financial years' (1998/1999) net profit was generated by the conference venue alone?**
……………………………………………………………….……….**%**

60. **For recently opened venues, what is the projected net profit to be generated from the conference facilities for this financial year?**
£…………………………………………………………………………

Part Eleven *Future Plans*

Part eleven aims to identify the future plans for your conference facilities

61. **What do you have planned for the future of your convention facility?**

❑ Extend facilities
❑ Improve technical equipment
❑ Improve staff training

- ❑ Attract larger conventions
- ❑ Attract overseas conferences
- ❑ Other, please specify…………

62. **In your opinion, how do you see the future of the conference market in general?**

- ❑ Continued growth
- ❑ Increased competition
- ❑ Closures of small venues
- ❑ Building of larger venues
- ❑ Increased overseas market
- ❑ Other, please specify ……………………..

63. **Why do you think there has been significant growth in the purpose-built convention centres industry as a whole?**

…………………………………………………………………………………………………
…………………………………………………………………………………………………

Any further comments.

…………………………………………………………………………………………………
…………..……..………………………………………………………………………………

Figure 6.11 – The growth and development of U.K. visitor attractions with conference venues questionnaire

The Growth and Development of U.K. Visitor Attractions with Conference Facilities.

The questionnaire has ten parts:
1) General information
2) Type of conference facilities offered
3) Type of events and number of delegates
4) Number of employees
5) The opening of the conference facilities
6) Renovation to the conference facilities
7) Future plans to renovate the conference facilities
8) Ownership and funding
9) Finance
10) Future plans

Please read the instructions at the beginning of each section. Most of the questions simply require you to tick the box(es) opposite your answer. The other questions simply require a short written explanation of no more than 15 words or conference data. The questionnaire will take approximately 20 minutes to complete.

The results of this survey will be disseminated through a variety of sources, however, may I reassure you that you and your organisation will remain anonymous.

Thanking you in advance for your co-operation.

Please return the completed questionnaire to:
Julie Spiller,
International Centre for Tourism & Hospitality Research,
School of Service Industries
Bournemouth University
PO Box 2816
Poole, Dorset BH12 5YT
Telephone 01202 595223. Fax 01202 595228

Part One *General Information*

Please answer these questions in terms of your job over the last 12 months. If you have been in your current job for less than 12 months please base your answers on your current job.

2. **Respondent's job title.**

❑ Director ❑ Conference Manager ❑ General Manager ❑ Accountant
❑ Other, please state……..…………

2. **How long have you worked at the establishment?** ……………………….years

Part Two *Type of Conference Facilities Offered*

Part two aims to identify the general characteristics of your conference facilities. Please answer the questions by ticking the appropriate boxes. Question four requires the size of conference rooms to be entered and question ten requires percentages of conference bookings to be entered

8. **What is the nature of the attraction?** (✓ more than one box if applicable).
❑ Castle, Country House and Historic Building *with* Accommodation
❑ Castle, Country House and Historic Building *without* Accommodation
❑ Museum / Gallery
❑ Fun Park
❑ Boat /Train
❑ Sport and Leisure Centres
❑ Theatre and Concert Hall
❑ Urban venue
❑ Rural venue
❑ Beach Resort Venue
❑ Other, please specify………………………………………………………

4. **What is the size of the conference facilities?**

Theatre style, capacity of largest meeting room	m^2	
Conference venue maximum capacity of delegates	Seated	Not-seated
Exhibition space; maximum exhibition space	m^2	
Number of additional meeting rooms	Boardrooms	Classrooms
Banqueting capacity of largest room	m^2	
Banqueting maximum capacity of delegates	Seated	Not-seated
Total floor space	m^2	
Accommodation: number of bedrooms (if applicable)		

5. **Hotel bedroom facilities for conference delegates** (✓ more than one box if applicable).

- ❑ Telephone
- ❑ Fax
- ❑ E-mail
- ❑ Satellite TV
- ❑ Mini Bar
- ❑ Desk and writing material

6. **Facilities featured in your conference facilities** (✓ more than one box if applicable).

- ❑ Sound insulation in conference rooms
- ❑ Blackout attainable in conference rooms
- ❑ Good acoustics
- ❑ Air conditioning
- ❑ Temperature control
- ❑ Natural lighting
- ❑ Comfortable chairs
- ❑ Sound-proof conference rooms
- ❑ Separate coffee-break area
- ❑ Quiet environment
- ❑ Tiered amphitheatre

7. **What products are offered to delegates?** (✓ more than one box if applicable).

- ❑ Basic equipment (including OHP white board & flip charts)
- ❑ Audio-visual equipment
- ❑ Technical support
- ❑ Translation services
- ❑ Video-conferencing facilities
- ❑ Convention bureau
- ❑ Other, please specify………………………………………………

8. **What catering facilities are offered?** (✓appropriate box).

- ❑ In-house catering services
- ❑ Contracted in catering services

9. **What type of events / activities do you offered to delegates, e.g. tours** (✓ more than one box if applicable).

- ❑ Type of social programme. E.g. tour of local area
- ❑ Tour of attraction/conference facility
- ❑ Corporate games
- ❑ Bar(s)
- ❑ Leisure activities
- ❑ Banquet / Receptions / Functions
- ❑ Health facilities, swimming pool, work-out room. sauna, steam-room
- ❑ Beauty salon or other beauty facilities
- ❑ Other, please specify. …………………………………………………………....

10. **What percentage of conference reservations is made directly with the venue or through a conference organiser?**

Directly with the venue	%
Through a professional conference organiser, or a venue finding agency	%

11. **Please rank your conference services in order of importance, 1 being the most important and 11 the least important**.

- ❑ The conference venue provides a wide range of meeting capacities
- ❑ The conference venue provides high-tech facilities
- ❑ A conference bureau service is provided
- ❑ Excellent communication links provide easy access to the conference venue
- ❑ The convention centre has in-house accommodation / approved local hotel accommodation
- ❑ There is a high level of service and customer-oriented staff
- ❑ There are sufficient local attractions to entertain delegates outside conference hours
- ❑ The appeal is the availability of a tour of the venue as part of the social programme
- ❑ The conference venue has a unique experience
- ❑ The conference venue has a unique atmosphere
- ❑ *Other, please specify. ………………………………………………………*

Part Three *Type of Events and Number of Delegates*

Part three is designed to collect statistics about the type of events held at your conference venue. Please read the notes below to clarify terms before answering the questions.

Conference - For the purpose of this study a conference has been defined as an out of office meeting of at least six hours duration (including meals) involving a minimum of eight people. Also including conventions, & conferences with exhibits.
Trade and public exhibitions, with or without seminars, including employment fairs, product launches and fashion shows.
Performance/Entertainment events - concerts, variety shows, theatre.
Banquet/reception functions - galas, banquets, dinner parties and receptions.
Other events - graduation ceremonies prize giving, miscellaneous
Association-professional groups; trade unions; societies; clubs; political parties; charities- primarily non-profit bodies & organisations.
Government - national/local government; local authority sponsored meetings; public enquiries, university and school organised events.
Corporate ***- company meetings; training courses; annual general meetings; board meetings; sales meetings; product launches***

12. ***Please indicate the number of activities, which took place at your conference venue in the year 2000***

	Conferences / Business Meetings	Public Exhibitions / Trade Shows	Performances / Entertainment	Banquets / Functions / Receptions	Other e.g. Ceremonies
Spring					
Summer					
Autumn					
Winter					
Total					

13. ***Please indicate the number of events that took place in the years 1997-1999 and offer a projection for 2001***

Total Number of Events	1997	1998	1999	**2001 projection**
Conferences / Business Meetings				
Public Exhibitions / Trade Shows				
Performances / Entertainment				
Banquet / Receptions / Functions				
Other e.g. Ceremonies				

14. ***What are the general characteristics of the conference delegates?***

Type of Event	Average Daily Spend of Delegate	Average Number of Delegates	Average Length of stay of Delegate	% of Delegates who are Local	% of Delegates who are Non-Local
Association					
Corporate					
Government					

Part Four *Number of Employees*

Please answer the questions in part four in terms of the number of employees who work in the tourism attraction *as a whole and the number of employees who work specifically in the convention venue.*

15. **Please estimate the total number of employees in your tourism attraction as a whole.**

    Full-time ……………**part time** …………….employees

16. **Please estimate the total number employees who are employed by *the conference venue alone.***

    Full-time……………**part time**……………employees

Part Five *The Opening of the Conference Facilities*

Please answer the questions in this part in terms of the reasons for opening the convention venue.

17. **In what year did the venue, *as an attraction,* open to the public?**
    ………………….........………

18. **Was your visitor attraction built and opened at the *same time* as the dedicated conference facilities?**
    If **No** please continue from question **19**. If **Yes** continue from question **20**.

    ❑ Yes ❑ No

19. **In what year were the *conference facilities* subsequently added and opened?**
    ………………...........………..

20. **What are the reasons for creating / supplying your conference facilities?**
    (✓ one box for each factor).
    1=highly significant: **3**=significant: **5**=not significant.

Factor	1	2	3	4	5
To spread the risk from a single revenue stream to multiple revenue streams					
To subsidise income for the upkeep of the building					
Due to changes in funding systems, such as a decrease in central and local government funding					
In response to market demand					
Estimated demand					
Due to consecutive poor tourist seasons in terms of visitor numbers					
Aim to attract business in off-peak times					
To generate an additional revenue source					

To attract repeat visitation					
Due to an increase in competition for leisure spend which has resulted in many attractions having to generate more revenue					
Other such attractions have added conference facilities					
Other, please specify…………………….					

21. **Please specify the costs incurred in building the conference facilities?**

£……………………………………………………………………

Part Six *Renovation to the Conference Facilities*

Please answer the questions in this part in terms of renovation which may have taken place since the conference venue has opened. The aim is to identify whether or not the conference venue is regularly changing and updating its facilities, or whether no change has taken place since the venue opened.

22. **Were your conference facilities added;** (✓ more than one box if applicable).

❑ To utilise unused space ❑ By converting rooms

23. **Were refurbishments or extensions carried out in order to create conference facilities?**
If **yes** please continue from question **24** If **no** please continue from question **25**

❑ Yes ❑ No

24. **What was the nature of such refurbishment or extensions?**

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify……………………………………………………….

25. **Have any *changes been made* (such as refurbishment or extensions) to the facilities or venue *since* the conference centre opened?** (If answered **No** go to part seven).

❑ **Yes** ❑ **No**

26. **In what year did this refurbishment or extension take place?**
……….………........……………..

27. **Please list the three primary reasons for the changes.**

1) ….………………………………………………………………

2) ……..……………………………………………………………………
3) ..…………………………………… ………………………………

28. **What was the nature of such refurbishment or extensions?**

- ❑ Upgrade existing rooms by improve the standard of furnishings
- ❑ Upgrade existing rooms by improve the standard of decor
- ❑ Comply with Health and Safety Regulations
- ❑ Install modern conference equipment
- ❑ Convert or extend existing facilities to provide more meeting or breakout rooms
- ❑ Provide disabled access / facilities
- ❑ Other, please specify……………………………………………………….

29. **What costs were incurred during the refurbishment or extension of the conference facilitie**s?

£………..…………………………………………

Part Seven *Future Plans to Renovate the Conference Facilities*

Please answer the questions in this part in terms of future plans to renovate the conference facilities. The aim is to identify whether or not the conference venue is regularly changing and updating its facilities, or whether no change has taken place since the venue opened.

30. **Are there any future plans to refurbish or to extend the conference facilities?**

❑ **Yes** ❑ **No** (If answered **No,** go to question **35)**.

31. **The future plans to extend/refurbish the conference facilities will take place during which year?**

20...…

32. **Please list the three primary reasons for the changes**

1) …….……………………………………………………………………
2) ……………………………………………………………………………………
3) …….…………………………… ………………………………………….

33. **Please specify nature of the refurbishment / extension for the *future plans*.**

- ❑ Upgrade existing rooms by improve the standard of furnishings
- ❑ Upgrade existing rooms by improve the standard of decor
- ❑ Comply with Health and Safety Regulations
- ❑ Install modern conference equipment
- ❑ Convert or extend existing facilities to provide more meeting or breakout rooms
- ❑ Provide disabled access / facilities
- ❑ Other, please specify……………………………………………………….

34. **What is the proposed budget for the *future plans*?**
£..

35. **Does the conference centre need refurbishment, expansion and / or improvements that cannot be undertaken due to financial constraints?**

❑ **Yes** ❑ **No** (If **No** please continue from question **37**)

36. **What development would be undertaken if financial constraints were not present?**

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify...

37. **To your knowledge has the conference venue encountered any of the following problems in the running of the facilities?** (Please rank in order of severity of problems, 1 being the most severe and 10 the least severe).

❑ Operating problems
❑ Reduced demand for conference facilities
❑ Lack of break-out rooms / facilities
❑ Lack of technical equipment
❑ Lack of trained staff
❑ Insufficient conference lead times
❑ Difficulty of attracting repeat meetings / delegates
❑ Increasing costs
❑ Increased competition from other conference facilities
❑ Other, please specify...............................

Part Eight *Ownership And Funding*

Please answer the questions in this part in terms of the ownership and funding of the conference venue. The aim is to identify whether or not your conference venue is publicly or privately owned and what grants or subsidies does the conference venue receive?

38. **Who owns the conference venue?**

❑ Public Authority ❑ Private Ownership ❑ Joint Ownership ❑ Charity
❑ Other, please specify ....

39. **Does the conference venue receive any form of subsidy or grant?**

❑ **Yes** ❑ **No** (If answered **No** go to question **44)**.

40. **What is the source of the subsidy or grant?**

	Yes (✓)	No (✓)	Amount in £	Single, one off payment (✓)	Multiple, continuous Payments (✓)
Central Government					
Local Government					
EC Regional grants					
Lottery funding					
Millennium commission funding					
Tourism board funding					
Other, please specify ……..……………………....					

41. **Please state the *specific name* and *year* of the funds received**

Name…………………………**date**..……………**Name**………………**date**…………….

Name…………………………**date**…………….**Name**………………**date**……………..

42. **Is the conference centre reliant upon such grant(s) or subsidy(ies) for its continued operation and success?**

❑ **Yes** ❑ **No** (If answered **No** go to question **44)**.

43. **If yes, please ✓ the level of relevance in the table below**.

Highly dependent	Dependent	Average	Not dependent	Not dependent at all

44. **If the venue is *privately funded,* who pays for the refurbishment?**
………………………………………………………………………………………

Part Nine *Finance*

Part nine aims to identify the general financial characteristics of your conference facilities

45. **What was the total *net profit* for the *attraction and conference venue* for the financial year 1999/2000?**
£…………………………………………………………………………

46. **What was the *increase or (decrease)* in net profit for the attraction & conference venue over the previous financial year (1998/1999)?**
……………………………………………………………………….%

47. **What proportion of the 1999/2000 net profit was generated by the conference venue alone?**
……………………………………………………………………….%

48. **What proportion of the *previous* financial years' (1998/1999) net profit was generated by the conference venue alone?**
………………………………………………………………….%

49. **For recently opened venues, what is the projected net profit to be generated from the conference facilities for this financial year?**
£…………………………………………………………

Part Ten *Future Plans*

Part ten aims to identify the future plans for your conference facilities

50. **What do you have planned for the future of your convention facility?**

- ❑ Extend facilities
- ❑ Improve technical equipment
- ❑ Improve staff training
- ❑ Attract larger conventions
- ❑ Attract overseas conferences
- ❑ Other, please specify…………

51. **In your opinion, how do you see the future of the conference market in general?**

- ❑ Continued growth
- ❑ Increased competition
- ❑ Closures of small venues
- ❑ Building of larger venues
- ❑ Increased overseas market
- ❑ Other, please specify ……….……..

52. **Why do you think there has been significant growth in the purpose-built convention centres industry as a whole?**
………………………………………………………………………………………………
……………………………………………………………………………

53. **Any further comments.**…………………………………………………………..…………
………………………………………………………………………………………………

Figure 6.12 – The growth and development of U.K. educational establishments with conference venues questionnaire

The Growth and Development of U.K. Educational Establishments with Conference Facilities.

The questionnaire has ten parts:
1) General information
2) Type of conference facilities offered
3) Type of events and number of delegates
4) Number of employees
5) The opening of the conference facilities
6) Renovation to the conference facilities
7) Future plans to renovate the conference facilities
8) Ownership and funding
9) Finance
10) Future plans

Please read the instructions at the beginning of each section. Most of the questions simply require you to tick the box(es) opposite your answer. The other questions simply require a short written explanation of no more than 15 words or conference data. The questionnaire will take approximately 20 minutes to complete.

The results of this survey will be disseminated through a variety of sources, however, may I reassure you that you and your organisation will remain anonymous.

Thanking you in advance for your co-operation.

Please return the completed questionnaire to:
Julie Spiller,
International Centre for Tourism & Hospitality Research,
School of Service Industries
Bournemouth University
PO Box 2816
Poole, Dorset BH12 5YT
Telephone 01202 595223. Fax 01202 595228

Part One *General Information*

Please answer these questions in terms of your job over the last 12 months. If you have been in your current job for less than 12 months please base your answers on your current job.

3. **Respondent's job title.**

❑ Director ❑ Conference Manager ❑ General Manager ❑ Accountant ❑ Other, please state……..…………

3. **How long have you worked at the establishment?** ……………………….years

Part Two *Type of Conference Facilities Offered*

Part two aims to identify the general characteristics of your conference facilities. Please answer the questions by ticking the appropriate boxes. Question four requires the size of conference rooms to be entered and question eleven requires percentages of conference bookings to be entered.

3. **Please select the type of conference venue that most matches yours?** (✓ more than one box if applicable).
   - ❑ University
   - ❑ College or Further/Higher Education Establishment
   - ❑ Management Training Centre
   - ❑ Urban Venue
   - ❑ Rural Venue
   - ❑ Beach Resort Venue
   - ❑ Other, please specify …………………………………………………..

5. **What is the size of the conference facilities?**

Theatre style, capacity of largest meeting room	m^2	
Conference venue maximum capacity of delegates	Seated	Not-seated
Exhibition space; maximum exhibition space	m^2	
Number of additional meeting rooms	Boardrooms	Classrooms
Banqueting capacity of largest room	m^2	
Banqueting maximum capacity of delegates	Seated	Not-seated
Total floor space	m^2	
Accommodation: number of bedrooms (if applicable)		

5. **Delegate accommodation;** (✓ more than one box if applicable).

- ❑ Halls of residents
- ❑ Hotel on university grounds
- ❑ Neighbouring hotels
- ❑ Other, please specify ……………………………..

9. **Hotel bedroom facilities for conference delegates** (✓ more than one box if applicable).

- ❑ Telephone
- ❑ Fax
- ❑ E-mail
- ❑ Satellite TV
- ❑ Mini Bar
- ❑ Desk and writing material

10. **Facilities featured in conference venue** (✓ more than one box if applicable).

- ❑ Sound insulation in conference rooms
- ❑ Blackout attainable in conference rooms
- ❑ Good acoustics
- ❑ Air conditioning
- ❑ Temperature control
- ❑ Natural lighting
- ❑ Comfortable chairs
- ❑ Sound-proof conference rooms
- ❑ Separate coffee-break area
- ❑ Quiet environment
- ❑ Tiered amphitheatre

8. **What products are offered to delegates?** (✓ more than one box if applicable).

- ❑ Basic equipment (including OHP, white board & flip charts)
- ❑ Audio-visual equipment
- ❑ Technical support
- ❑ Translation services
- ❑ Video-conferencing facilities
- ❑ Convention bureau
- ❑ Other, please specify………………………………………………………………

9. **What catering facilities are offered?** (✓appropriate box).

- ❑ In-house catering services
- ❑ Contracted in catering services

10. **What type of events / activities do you offered to your delegates, e.g. tours** (✓ more than one box if applicable).

- ❑ Type of social programme. E.g. tour of local area
- ❑ Tour of university/conference facility
- ❑ Corporate games
- ❑ Bar(s)
- ❑ Leisure activities
- ❑ Health facilities, swimming pool, work-out room. sauna, steam-room
- ❑ Beauty salon or other beauty facilities
- ❑ Banquet / Receptions / Functions
- ❑ Other, please specify. ………………………....

11. **What percentage of conference reservations is made directly with the venue or through a conference organiser?**

Directly with the venue	*%*
Through a professional conference organiser, or a venue finding agency	*%*

12. **Please rank your conference services in order of importance, 1 being the most important and 11 the least important**.

- ❑ The conference venue provides a wide range of meeting capacities
- ❑ The conference venue provides high-tech facilities
- ❑ A conference bureau service is provided
- ❑ Excellent communication links provide easy access to the conference venue
- ❑ The convention centre has in-house accommodation / approved local hotel accommodation
- ❑ There is a high level of service and customer-oriented staff
- ❑ There are sufficient local attractions to entertain delegates outside conference hours
- ❑ The appeal is the availability of a tour of the campus as part of the social programme
- ❑ The conference venue has a unique experience
- ❑ The conference venue has a unique atmosphere
- ❑ Other, please specify. ………………………………………

Part Three *Type of Events and Number of Delegates*

Part three is designed to collect statistics about the type of events held at your conference venue. Please read the notes below to clarify terms before answering the questions.

Conference - For the purpose of this study a conference has been defined as an out of office meeting of at least six hours duration (including meals) involving a minimum of eight people. Also including conventions, & conferences with exhibits.

Trade and public exhibitions, with or without seminars, including employment fairs, product launches and fashion shows.
Performance/Entertainment events - concerts, variety shows, theatre.
Banquet/reception functions - galas, banquets, dinner parties and receptions.
Other events - graduation ceremonies prize giving, miscellaneous
Association-professional groups; trade unions; societies; clubs; political parties; charities-primarily non-profit bodies & organisations.
Government - national/local government; local authority sponsored meetings; public enquiries, university and school organised events.
Corporate ***- company meetings; training courses; annual general meetings; board meetings; sales meetings; product launches***

13. **When are conventions held?**

❑ All year round ❑ Only during student vacations

14. **Please indicate the number of activities, which took place at your conference venue in the year 2000**

	Conferences / Business Meetings	Public Exhibitions / Trade Shows	Performances / Entertainment	Banquets / Functions / Receptions	Other e.g. Ceremonies
Spring					
Summer					
Autumn					
Winter					
Total					

15. ***Please indicate the number of events that took place in the years 1997-1999 and offer a projection for 2001***

Total Number of Events	1997	1998	1999	**2001 projection**
Conferences / Business Meetings				
Public Exhibitions / Trade Shows				
Performances / Entertainment				
Banquet / Receptions / Functions				
Other e.g. Ceremonies				

16. ***What are the general characteristics of the conference delegates?***

Type of Event	Average Daily Spend of Delegate	Average Number of Delegates	Average Length of stay of Delegate	% of Delegates who are Local	% of Delegates who are Non-Local
Association					
Corporate					
Government					

Part Four *Number of Employees*

Please answer the questions in part four in terms of the number of employees who work in the university *as a whole and the number of employees who work specifically in the convention venue.*

17. **Please estimate the total number of employees in the university as a whole.**

    Full-time ……………**part time** …………….employees

18. **Please estimate the total number employees who are employed by *the conference venue alone.***

    Full-time……………**part time**……………employees

Part Five *The Opening of the Conference Facilities*

Please answer the questions in this part in terms of the reasons for opening the convention venue.

19. **In what year did the university open?** …………………........………

20. **Was your university built and opened at the *same time* as the dedicated conference facilities?**
    If **No** please continue from question **21**. If **Yes** continue from question **22**.

    ❑ Yes ❑ No

21. **In what year were the *conference facilities* subsequently added and opened?**
    ……..........………..

22. **What are the reasons for creating / supplying your conference facilities?**
    (✓ one box for each factor).
    1=highly significant: **3**=significant: **5**=not significant.

Factor	1	2	3	4	5
To generate an additional revenue source					
To spread the risk from a single revenue stream to multiple revenue streams					
To subsidise income for the upkeep of the buildings					
Due to changes in funding systems, such as a decrease in central and local government funding					
In response to market demand					
Estimated demand					
To provide facilities for academic debate at an international / national level and standard					
Aim to attract business in off-peak times such as student vacations					
To promote local business links					
Other universities have added conference facilities					
Other, please specify…………………….					

6. **Please specify the costs incurred in building the conference facilities?**
   £………………………….

Part Six *Renovation to the Conference Facilities*

Please answer the questions in this part in terms of renovation which may have taken place since the conference venue has opened. The aim is to identify whether or not the conference venue is regularly changing and updating its facilities, or whether no change has taken place since the venue opened.

24. **Were your conference facilities added;** (✓ more than one box if applicable).

- ❑ To utilise unused space
- ❑ By converting rooms

25. **Were refurbishments or extensions carried out in order to create conference facilities?**
If **yes** please continue from question **26** If **no** please continue from question **27**

❑ Yes ❑ No

26. **What was the nature of such refurbishment or extensions?**

- ❑ Upgrade existing rooms by improve the standard of furnishings
- ❑ Upgrade existing rooms by improve the standard of decor
- ❑ Comply with Health and Safety Regulations
- ❑ Install modern conference equipment
- ❑ Convert or extend existing facilities to provide more meeting or breakout rooms
- ❑ Provide disabled access / facilities
- ❑ Other, please specify…………………………………………………………….

27. **Have any *changes been made* (such as refurbishment or extensions) to the facilities or venue *since* the conference centre opened?** (If answered **No** go to part seven).

❑ **Yes** ❑ **No**

28. **In what year did this refurbishment or extension take place?**
…........……………..

29. **Please list the three primary reasons for the changes.**

1) ………………………………………………………………………………
2) ……..……………………………………………………………………
3) …………………………………………………………………………

30. **What was the nature of such refurbishment or extensions?**

- ❑ Upgrade existing rooms by improve the standard of furnishings
- ❑ Upgrade existing rooms by improve the standard of decor
- ❑ Comply with Health and Safety Regulations
- ❑ Install modern conference equipment

❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify……………………………………………………….

31. **What costs were incurred during the refurbishment or extension of the conference facilitie**s?

£………..……………………………………………

Part Seven ***Future Plans to Renovate the Conference Facilities***

Please answer the questions in this part in terms of future plans to renovate the conference facilities. The aim is to identify whether or not the conference venue is regularly changing and updating its facilities, or whether no change has taken place since the venue opened.

32. **Are there any future plans to refurbish or to extend the conference facilities?**

❑ **Yes** ❑ **No** (If answered **No,** go to question **37)**.

33. **The future plans to extend/refurbish the conference facilities will take place during which year?**

20...…

34. **Please list the three primary reasons for the changes**

1) ……..……………………………………………………………….
2) ……………………...…………………………………………………
3) .…….……………… ……

35. **Please specify nature of the refurbishment / extension for the *future plans*.**

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify……………………………………………………….

36. **What is the proposed budget for the *future plans*?**

£..……………………………………………………………

37. **Does the conference centre need refurbishment, expansion and / or improvements that cannot be undertaken due to financial constraints?**

❑ **Yes** ❑ **No** (If **No** please continue from question **39**)

38. **What development would be undertaken if financial constraints were not present?**

❑ Upgrade existing rooms by improve the standard of furnishings
❑ Upgrade existing rooms by improve the standard of decor
❑ Comply with Health and Safety Regulations
❑ Install modern conference equipment
❑ Convert or extend existing facilities to provide more meeting or breakout rooms
❑ Provide disabled access / facilities
❑ Other, please specify…………………………………………………….

39. **To your knowledge has the conference venue encountered any of the following problems in the running of the facilities?** (Please rank in order of severity of problems, 1 being the most severe and 10 the least severe).

❑ Operating problems
❑ Reduced demand for conference facilities
❑ Lack of break-out rooms / facilities
❑ Lack of technical equipment
❑ Lack of trained staff
❑ Insufficient conference lead times
❑ Difficulty of attracting repeat meetings / delegates
❑ Increasing costs
❑ Increased competition from other conference facilities
❑ Other, please specify………………………….

Part Eight *Ownership And Funding*

Please answer the questions in this part in terms of the ownership and funding of the conference venue. The aim is to identify whether or not your conference venue is publicly or privately owned and what grants or subsidies does the conference venue receive?

40. **Who owns the conference venue?**

❑ Public Authority ❑ Private Ownership ❑ Joint Ownership ❑ Charity
❑ Other, please specify …………

41. **Does the conference venue receive any form of subsidy or grant?**

❑ **Yes** ❑ **No** (If answered **No** go to question **46)**.

42. **What is the source of the subsidy or grant?**

	Yes (✓)	No (✓)	Amount in £	Single, one off payment (✓)	Multiple, continuous Payments (✓)
Central Government					
Local Government					
EC Regional grants					
Lottery funding					
Millennium commission funding					
Tourism board funding					
Other, please specify ……...……………………...					

43. **Please state the *specific name* and *year* of the funds received**

Name……………………………………**date.**…………...
Name……………………………………**date**……………...…
Name……………………………………**date**…………….
Name……………………………………**date**……………...…

44. **Is the conference centre reliant upon such grant(s) or subsidy(ies) for its continued operation and success?**

❑ **Yes** ❑ **No** (If answered **No** go to question **46)**.

45. **If yes, please ✓ the level of relevance in the table below**.

Highly dependent	Dependent	Average	Not dependent	Not dependent at all

46. **If the venue is *privately funded,* who pays for the refurbishment?**

………………………………………………………………

Part Nine ***Finance***

Part nine aims to identify the general financial characteristics of your conference facilities

47. **What was the total *net profit* for the *university and conference venue* for the financial year 1999/2000?**

£…………………………………………………………………………

48. **What was the *increase or (decrease)* in net profit for the university & conference venue over the previous financial year (1998/1999)?**

………………………………………..……….%

49. **What proportion of the 1999/2000 net profit was generated by the conference venue alone?**

………………………………………… ….%

50. **What proportion of the *previous* financial years' (1998/1999) net profit was generated by the conference venue alone?**

…………………………………… ….%

51. **For recently opened venues, what is the projected net profit to be generated from the conference facilities for this financial year?**

£……………………………………………

Part Ten *Future Plans*

Part ten aims to identify the future plans for your conference facilities

52. **What do you have planned for the future of your convention facility?**

- ❑ Extend facilities
- ❑ Improve technical equipment
- ❑ Improve staff training
- ❑ Attract larger conventions
- ❑ Attract overseas conferences
- ❑ Other, please specify…………

53. **In your opinion, how do you see the future of the conference market in general?**

- ❑ Continued growth
- ❑ Increased competition
- ❑ Closures of small venues
- ❑ Building of larger venues
- ❑ Increased overseas market
- ❑ Other, please specify …………..……..

54. **Why do you think there has been significant growth in the purpose-built convention centres industry as a whole?**

………………………………………………………………………………………
………………………………….

55. Any further comments.

Figure 6.13 – Covering letter sent with the main questionnaire

Dear

In October 1999, the London Chambers of Commerce and Industry Commercial Educational Trust (LCCICET) agreed to support and finance the establishment of a Meeting, Incentive, Conference and Exhibition (MICE) tourism research unit at the International Centre for Tourism & Hospitality Research, Bournemouth University.

The primary aim of the MICE Research Unit (MRU) is to carry out comprehensive research for the convention industry. Due to the importance of your venue for conference activities, we would be delighted if you would participate in our research.

I should be most grateful if you would complete the enclosed questionnaire and return it to me before the 29th June 2001, as well as a copy of your conference brochure (including hire costs) and a copy of your events calendar. I enclose a prepaid envelope for this purpose.

The results of this survey will be disseminated through a variety of sources, however, may I reassure you that you and your organisation will remain anonymous.

Thanking you in advance for your time and effort.

Yours sincerely

Julie Spiller
MICE Researcher

APPENDIX D

Table 7.2 – Respondents job title;
hotels with conference facilities

Responsibility	Number of respondents citing responsibility (%)
Conference Manager	132 (46.2)
Director	21 (7.3)
General Manager	51 (17.8)
Other	82 (28.7)
Total (n=)	286 (100)

Table 7.3 – Respondents job title;
visitor attractions with conference facilities

Responsibility	Number of respondents citing responsibility (%)
Conference Manager	19 (28.37)
General Manager	15 (22.40)
Director	7 (10.46)
Other	26 (38.77)
Total (n=)	67 (100)

Table 7.4 – Respondents job title;
educational establishments with conference facilities

Responsibility	Number of respondents citing responsibility (%)
Conference Manager	9 (37.5)
General Manager	3 (12.5)
Director	1 (4.2)
Other	11 (45.8)
Total (n=)	24 (100)

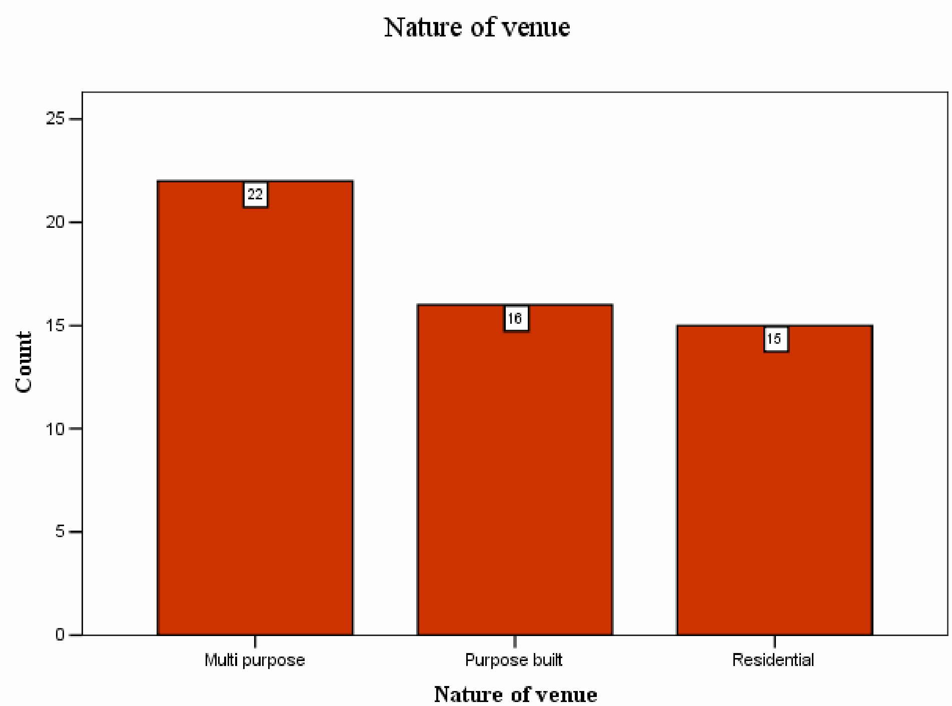


Figure 7.1 – The sub-division of purpose-built venues

(N = 53)

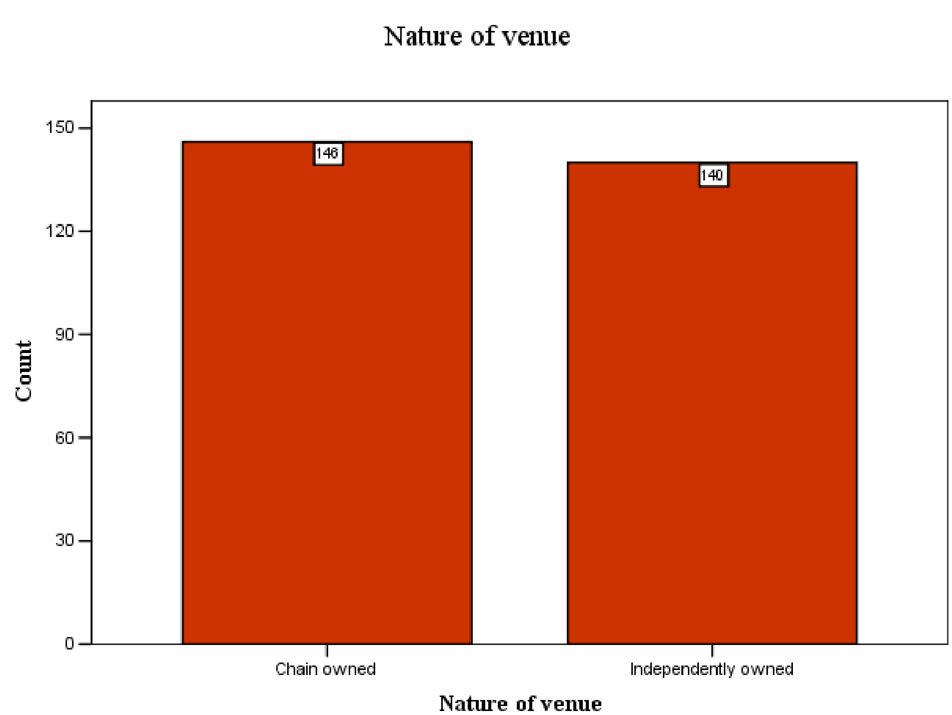


Figure 7.2 – The sub-division of hotels with conference facilities

(N = 286)

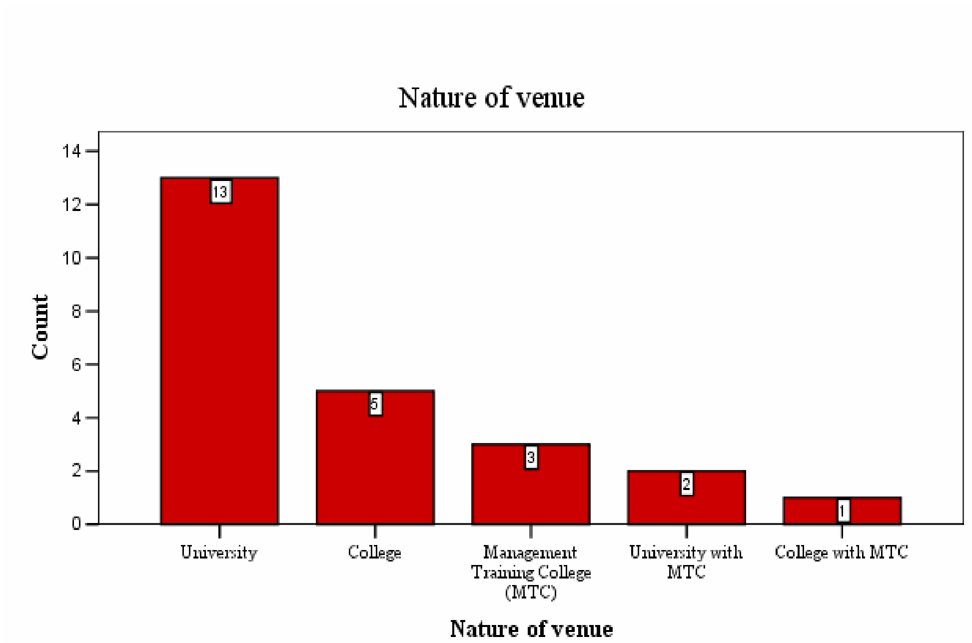


Figure 7.3 – The sub-division of educational establishment conference Facilities (N = 24)

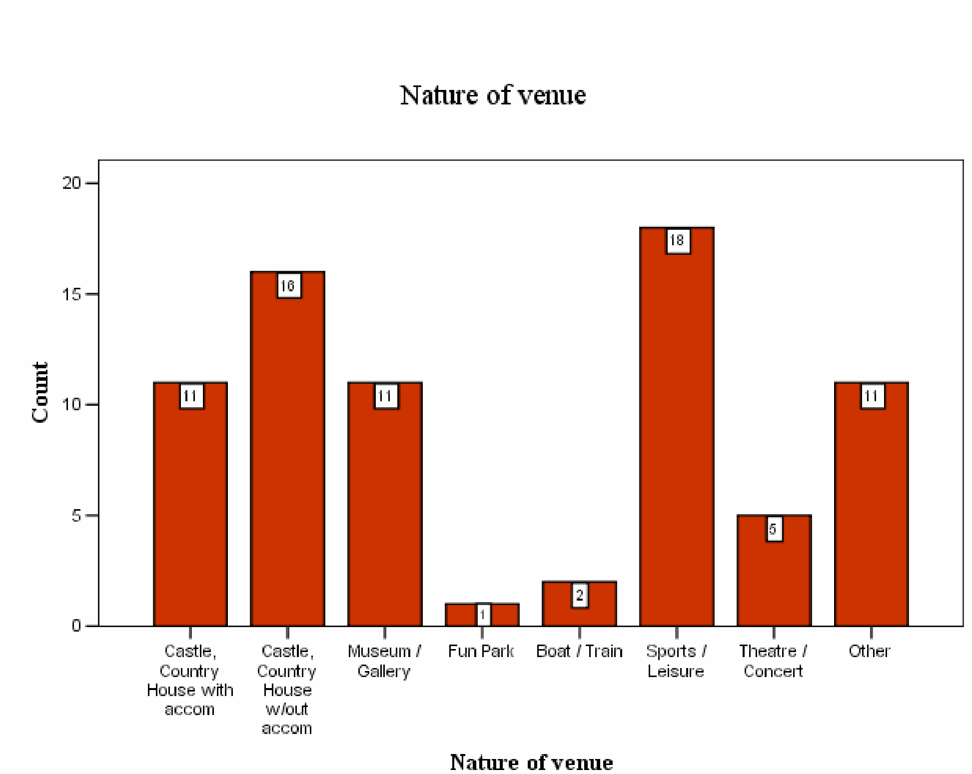


Figure 7.4 – The sub-division of visitor attractions with conference facilities Sub-division (N = 75)

Table 7.6 – The size and capacity of hotel conference venues

	Mean	Mode	Median	Min.	Max.	Standard Deviation	Count N =
Theatre style, capacity of largest meeting room m^2	361.8	200	190	14	6625	79.15	197
Conference venue maximum capacity of delegates (seated)	209.7	200	150	10	2200	241.57	244
Conference venue maximum capacity of delegates (not seated)	306.8	200	200	20	6000	296.01	193
Number of additional boardrooms	6.4	3	4	0	90	6.21	225
Number of additional classrooms	4.4	0	2	0	60	5.78	181
Banqueting capacity of largest room m^2	312.6	120	186	16	4715	361.81	189
Banqueting maximum capacity of delegates seated	189.7	120	145	28	1500	185.57	229
Banqueting max. capacity of delegates (not seated)	257.2	200	200	45	2000	237.24	179
Total floor space m^2	581.2	1000	274.72	22.77	6625	581.14	141
Accommodation: no. rooms	110.5	48	78	6	910	110.07	260

Table 7.7 – The size and capacity of educational establishments conference venues

	Mean	Mode	Median	Min.	Max.	Standard Deviation	Count N =
Theatre style, capacity of largest meeting room m^2	612.5	180	400	70	3445	612.50	19
Conference venue maximum capacity of delegates (seated)	433.7	100	190	20	1500	433.70	23
Conference venue maximum capacity of delegates (not seated)	529.3	150	325	130	1500	529.29	14
Number of additional boardrooms	8	3	5	1	50	8.00	19
Number of additional classrooms	24.1	0	4.4	0	200	24.12	24
Banqueting capacity of largest room m^2	713.1	250	463	150	3445	713.06	15
Banqueting maximum capacity of delegates seated	338.8	150	275	100	1000	338.75	20
Banqueting max. capacity of delegates (not seated)	477.1	400	400	180	1200	477.14	14
Total floor space m^2	8257.8	N/a	1245.08	220	53358	8257.76	8
Accommodation: no. rooms	667.4	62	256	30	3000	638.35	22

Table 7.8 – The size and capacity of visitor attraction venues

	Mean	Mode	Median	Min.	Max.	Standard Deviation	Count N =
Theatre style, capacity of largest meeting room m^2	641.1	80	242	20	9008	641.08	45
Conference venue maximum capacity of delegates (seated)	531.9	200	200	20	12400	531.88	67
Conference venue maximum capacity of delegates (not seated)	700.2	300	300	30	12500	700.23	43
Number of additional boardrooms	8.4	1	3	0	135	8.27	58
Number of additional classrooms	4.2	0	1	0	50	4.02	41
Banqueting capacity of largest room m^2	562.3	100	214	22	9008	562.32	49
Banqueting maximum capacity of delegates seated	363.3	100	200	35	4000	357	57
Banqueting max. capacity of delegates (not seated)	633.9	300	300	50	8000	620.40	46
Total floor space m^2	1592.5	1000	964.5	83.72	9573	1541.17	30
Accommodation: no. rooms	104.3	N/A	41	6	800	18.01	13

Table 7.16 – Conference services offered by purpose-built venues ranked by mean value

	Mean	Mode	Median	Min.	Max.	Standard Deviation	Count N =
High level of service and customer-oriented staff	2.6	1	2	1	8	1.72	53
Venue provides wide range of meeting capacities	2.8	2	2	1	11	2.07	53
Excellent communication links provide easy access	4.5	3	4	1	9	2.4	51
Venue has a unique atmosphere	4.9	6	5	1	11	2.45	51
Venue has a unique experience	5.3	6	6	1	10	2.64	48
Venue provides high-tech facilities	5.8	5	6	2	9	2.12	47
Sufficient local attractions to entertain delegates	6.0	6	6	2	10	2.05	47
Venue has in-house accommodation	6.1	5	5	1	11	3.07	37
Availability of a tour of the purpose-built conference facilities	8.1	10	9	1	11	2.76	53
A conference bureau service is provided	8.7	10	9	2	11	2.06	53

Table 7.17 – Conference services offered by hotel venue's ranked by mean value

	Mean	Mode	Median	Min.	Max.	Standard Deviation	Count N =
High level of service and customer-oriented staff	2.1	1	1	1	11	1.71	53
Venue provides wide range of meeting capacities	3.4	2	3	1	9	2.22	53
Venue has in-house accommodation	3.6	3	3	1	10	2.12	51
Excellent communication links provide easy access	4.5	4	4	1	9	2.28	37
Venue has a unique atmosphere	5.4	3	5	1	10	2.58	47
Venue has a unique experience	5.9	7	6	1	11	2.54	48
Venue provides high-tech facilities	6.3	5	6	1	11	2.35	51
Sufficient local attractions to entertain delegates	6.4	9	6	2	11	2.38	47
A conference bureau service is provided	7.9	10	9	1	11	2.14	53
Availability of a tour of the purpose-built conference facilities	8.1	10	9	2	11	2.16	53

Table 7.18 – Conference services offered by visitor attraction venue's ranked by mean value

	Mean	Mode	Median	Min.	Max.	Standard Deviation	Count N =
High level of service and customer-oriented staff	2.5	1	2	1	7	1.62	70
Venue has a unique atmosphere	3.1	2	3	1	9	2.08	70
Venue has a unique experience	3.4	1	3	1	10	2.28	68
Venue provides wide range of meeting capacities	3.8	1	3	1	10	2.89	64
Excellent communication links provide easy access	4.7	5	5	1	10	2.47	66
Availability of a tour of the venue	5.3	4	5	1	11	2.81	61
Venue provides high-tech facilities	6.6	4	6	2	11	2.24	58
Sufficient local attractions to entertain delegates	6.8	5	6	2	11	2.21	66
Venue has in-house accommodation	7.2	10	8	1	11	3.09	61
A conference bureau service is provided	8.5	10	9	2	11	1.88	54

Table 7.19 – Conference services offered by educational establishment venue's ranked by mean value

	Mean	Mode	Median	Min.	Max.	Standard Deviation	Count N =
Venue provides wide range of meeting capacities	2.4	1	1.5	1	6	1.79	24
High level of service and customer-oriented staff	2.9	2	2	1	8	1.8	24
Venue has in-house accommodation	4.0	4	4	2	9	2.1	24
A conference bureau service is provided	4.2	2	4	1	11	2.13	24
Excellent communication links provide easy access	5.0	4	4	1	11	2.54	24
Venue provides high-tech facilities	5.3	2	5.5	2	10	2.62	24
Venue has a unique experience	6.5	9	7.5	1	10	2.65	24
Venue has a unique atmosphere	6.4	10	7	1	11	3.42	24
Sufficient local attractions to entertain delegates	7.0	6	7	1	10	2.24	24
Availability of a tour of the educational establishment	8.3	8	8	6	11	1.58	24

Table 7.21 – Conferences / business meetings at purpose-built conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	42.4	0	168	54.53	23
1998	54.7	0	172	62.57	25
1999	98.9	0	310	91.19	23
2000	230.7	2	1500	336.33	29
2001	132.4	0	460	116.22	21

Table 7.22 – Public exhibitions / trade shows at purpose-built conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	10.7	0	37	12.77	22
1998	16.1	0	105	27.13	24
1999	17.1	0	101	25.91	24
2000	19.0	0	93	24.11	25
2001	18.1	0	99	26.93	22

Table 7.23 – Performances / entertainment at purpose-built conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	42.8	0	411	109.16	21
1998	43.7	0	384	106.11	23
1999	39.4	0	255	80.96	24
2000	63.8	0	400	109.40	25
2001	37.2	0	250	80.65	22

Table 7.24 – Banquet / receptions / functions at purpose-built conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	29.5	0	80	27.46	25
1998	35.3	0	90	31.83	22
1999	49.1	0	220	54.12	23
2000	57.6	0	249	70.51	25
2001	68.4	0	250	72.19	21

Table 7.25 – Conferences / business meetings at hotel conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	211.3	0	2000	380.94	52
1998	197.2	0	2000	351.84	50
1999	247.4	0	2000	387.58	58
2000	366.1	0	5200	629.82	136
2001	351.5	0	4000	633.39	80

Table 7.26 – Public exhibitions / trade shows at hotel conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	6.3	0	50	12.59	62
1998	49.3	0	1600	235.48	63
1999	5.8	0	59	11.94	70
2000	6.9	0	52	10.94	126
2001	8.2	0	70	14.48	78

Table 7.27 – Performances / entertainment at hotel conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	56.9	0	3000	374.6	64
1998	10.8	0	125	25.37	66
1999	53.2	0	1680	246.51	71
2000	12.4	0	320	35.24	123
2001	13.8	0	180	31.99	76

Table 7.28 – Banquet / receptions / functions at hotel conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	39.5	0	200	43.71	51
1998	111.8	0	3200	443.63	51
1999	54.5	0	220	50.27	59
2000	89.1	0	1104	125.12	133
2001	114.9	0	1700	250.43	79

Table 7.29 – Conferences / business meetings at educational establishments conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	742.1	0	5000	1731.86	11
1998	763.4	1	5000	1722.69	12
1999	788.5	6	5000	1712.18	11
2000	192.8	0	600	196.25	12
2001	761.6	25	5000	1604.77	10

Table 7.30 – Public exhibitions / trade shows at educational establishments conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	1.3	0	3	1.51	10
1998	2.3	0	6	2.34	11
1999	2.3	0	4	1.37	11
2000	2.7	0	11	3.94	11
2001	3.6	0	10	3.95	11

Table 7.31 – Performances / entertainment at educational establishments conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	7.6	0	36	13.06	9
1998	2.4	0	10	3.74	10
1999	3.9	0	10	4.10	10
2000	10.1	0	60	18.97	9
2001	4.5	0	30	10.34	12

Table 7.32 – Banquet / receptions / functions at educational establishments conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	24.9	0	112	42.38	10
1998	27.9	0	97	36.92	10
1999	28.7	0	140	52.24	11
2000	102.9	0	800	235.39	11
2001	35.5	0	150	49.43	11

Table 7.33 – Conferences / business meetings at visitor attractions conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	221.3	0	1800	490.42	19
1998	260.8	3	1800	521.57	20
1999	273.2	0	1800	511.18	24
2000	623.2	2	16250	2559.46	41
2001	259.5	0	1900	498.8	33

Table 7.34 – Public exhibitions / trade shows at visitor attractions conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	10.3	0	151	33.32	20
1998	13.8	0	191	42.06	20
1999	16.6	0	280	56.46	24
2000	13.7	0	346	53.63	41
2001	18.8	0	380	66.38	32

Table 7.35 – Performances / entertainment at visitor attractions conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	10.1	0	60	18.52	18
1998	11.4	0	70	20.94	18
1999	14.7	0	80	24.0	22
2000	15.7	0	105	26.91	40
2001	27.7	0	250	53.30	31

Table 7.36 – Banquet / receptions / functions at visitor attractions conference venues; 1997 - 2001

	Mean	Minimum	Maximum	Std. Deviation	N=
1997	77.3	0	365	105.68	18
1998	106.5	0	850	194.45	20
1999	105.1	0	1000	211.21	24
2000	100.56	0	800	181.12	42
2001	83.2	0	950	173.13	33

Table 7.42 – The number of full time and part time employees at purpose-built conference venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
The total number of full time employees at the venue	4	1260	106.52	25	8	229.61	46
The total number of part time employees at the venue	0	700	77.42	20	0	165.58	43

Table 7.43 – The number of full time and part time employees at hotel conference venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
The total number of full time employees at the venue as a whole	4	651	62.86	40	30	71.09	242
The total number of part time employees at the venue as a whole	0	220	31.52	25	20	33.79	242
The total number full time employees in conference venue alone	0	120	5.79	3	0	11.97	239
The total number part time employees in conference venue alone	0	150	6.42	1	0	15.71	239

Table 7.44 – The number of full time and part time employees at educational establishments conference venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
The total number of full time employees at the venue as a whole	2	4000	1052.68	500	25	1229.79	19
The total number of part time employees at the venue as a whole	0	1500	325.50	125	30	449.0	16
The total number full time employees in conference venue alone	0	400	45.05	12	2	90.35	21
The total number part time employees in conference venue alone	0	200	25.10	6	0	46.01	21

Table 7.45 – The number of full time and part time employees at visitor attraction conference venue

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
The total number of full time employees at the venue as a whole	2	400	59.36	650	1000	72.21	56
The total number of part time employees at the venue as a whole	0	700	52.16	150	200	103.07	58
The total number full time employees in conference venue alone	0	86	11.27	12	3	16.76	62
The total number part time employees in conference venue alone	0	200	13.93	12	1	29.27	60

Table 7.47 – The number of association, corporate & government delegates attending conferences held at purpose-built venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
Association	0	800	160.7	67.5	10	214.81	16
Corporate	0	600	92.6	30	10	153.94	14
Government	0	400	117.1	90	90	123.22	8

Table 7.48 – The number of association, corporate & government delegates attending conferences held at hotel venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
Association	0	1500	57.3	25	20	162.70	87
Corporate	4	2100	61.4	20	20	22.15	124
Government	0	300	32.0	20	10	45.39	86

Table 7.49 – The number of association, corporate & government delegates attending conferences held at educational establishment venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
Association	15	400	110.6	80	60	115.77	9
Corporate	15	200	49.8	23.5	15	53.09	12
Government	14	150	55.7	40	14	52.83	6

Table 7.50 – The number of association, corporate & government delegates attending conferences held at visitor attraction venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
Association	2	400	135.5	57.5	30	227.83	26
Corporate	0	700	112.7	45	30	200.22	31
Government	0	86	105.3	50	20	199.73	24

Table 7.51 – Average length of stay of delegate's at purpose-built venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
Association	0	8.0	1.3	1	0	0.94	18
Corporate	0	3.0	1.1	1	1.5	0.76	20
Government	0	8.0	1.0	0.6	0	1.99	15

Table 7.52 – Average length of stay of delegate's at hotel venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
Association	0	7.0	1.6	1	1	0.91	86
Corporate	0	8.0	1.8	1.5	1	0.92	125
Government	0	8.0	1.5	1	1	0.96	86

Table 7.53 – Average length of stay of delegate's at educational establishments venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
Association	1.0	8.0	2.7	3	1	2.13	9
Corporate	1.0	3.0	1.8	1.75	1	0.7	10
Government	1.0	2.0	1.5	1.5	1	0.5	3

Table 7.54 – Average length of stay of delegate's at visitor attraction venues

	Minimum	Maximum	Mean	Median	Mode	Standard Deviation	N=
Association	0.1	3.0	1.2	1	1	0.68	26
Corporate	0.3	2.5	1.1	1	1	0.54	30
Government	0.5	2.0	1.1	1	1	0.39	24

Table 7.59 – A topology of the four conference venue classifications

Factor	Purpose Built	Hotels	Educational Establishments	Visitor Attractions
Dominant venue type within each classification	Multi-purpose	Chain-owned and independent hotels	Universities	Sports / Leisure centres Museums / Galleries
Ownership	Public / Private	Private	Public	Private
Average cost of constructing / adding conference facilities	Largest	*Smallest*	Medium	Medium
Were refurbishments required to create conference facilities	n/a	68.6%	54.2%	51.3%
What refurbishments were undertaken to create conference facilities	n/a	Convert / Extend	Disabled access Update décor Update furnishings Health & Safety Install modern conference equipment	Disabled access Update décor Update furnishings Health & Safety
Since opening, have refurbishments taken place	73.6%	62.4%	62.5%	52%
What refurbishments were undertaken since the opening of conference facilities	Update décor Update furnishings Health & Safety Disabled access	Upgrade furnishings Upgrade décor Convert / Extend	Update décor Update furnishings Health & Safety Disabled access	Update décor Update furnishings Health & Safety Disabled access
Theatre style, capacity of largest meeting room (m^2)	Largest	*Smallest*	Medium	Medium
Conference venue max capacity of delegates (seated)	Largest	*Smallest*	Medium	Medium
Conference venue max capacity of delegates (not seated)	Largest	*Smallest*	Medium	Medium
Exhibition space; maximum exhibition space (m^2)	Largest	*Smallest*	Medium	Medium
Number of additional boardrooms	Largest	*Smallest*	Medium	Medium
Number of additional classrooms	Medium	Medium	Largest	*Smallest*
Banqueting capacity of largest room (m^2)	Medium	*Smallest*	Largest	Medium
Banqueting maximum capacity of delegates (seated)	Largest	*Smallest*	Medium	Medium
Banqueting max. capacity of delegates (not seated)	Largest	*Smallest*	Medium	Medium

Total floor space (m^2)	Medium	*Smallest*	Largest	Medium
Average number of bedrooms offered per venue	*Smallest*	Medium	Largest	Medium
Factor	Purpose Built	Hotels	Educational Establishments	Visitor Attractions
Bedroom facility - Telephone		Most common	Least common	
Bedroom facility – Desk			Most common	Least common
Bedroom facility – satellite tv		Most common	Least common	
Bedroom facility – Email	Most common		Least common	
Bedroom facility – Fax		Most common	Least common	
Bedroom facility – mini bar	Most common		Least common	
Venue facility – Blackout attainable	Most common	Least common		
Venue facility – good acoustics	Most common	Least common		
Venue facility – air conditioning		Most common		Least common
Venue facility – temperature control		Most common		Least common
Venue facility – natural lights	Least common		Most common	
Venue facility – comfortable chairs		Most common		Least common
Venue facility – sound proof		Most common		Least common
Venue facility – coffee area	Most common			Least common
Venue facility – quiet environment			Most common	Least common
Venue facility – tiered amphitheatre		Least common	Most common	
Products offered – basic equipment	Most common	Most common	Most common	Least common
Products offered – audio-visual			Most common	Least common
Products offered – technical support		Least common	Most common	
Products offered – translation service	Most common		Most common	Least common
Products offered – video-conferencing			Most common	Least common
Products offered – conference bureau		Least common	Most common	
Events - Social programme	Least common	Most common		
Events - Tour	Least common			Most common
Events - Corporate games			Least common	Most common
Events - Bar(s)		Least common	Most common	
Events - Leisure activities		Most common		Least common
Events - Health facilities	Least common		Most common	

Events - Beauty salon	Least common		Most common	
Events - Banquets / Receptions		Most common	Least common	
Catering services	In-house	In-house	In-house	In-house
Full time staff for conferences alone	Largest	*Smallest*		
Factor	Purpose Built	Hotels	Educational Establishments	Visitor Attractions
Most important service offered by conference venue	High level of service and customer-oriented staff	High level of service and customer-oriented staff	Venue provides wide range of meeting capacities	High level of service and customer-oriented staff
Least important service offered by the conference venue	A conference bureau service is provided	Availability of a tour of the hotel conference facilities	Venue has a unique atmosphere	A conference bureau service is provided
Average length of service	Longest			Shortest
Conferences booked through	Directly	Via agency	Directly	Directly
Receive grants	Some	No	No	Some
Reliant upon grants	Yes	N/a	N/a	Yes
Primary reason for establishing conference facilities	Attract business in off peak times	Generate additional revenue source.	Generate additional revenue source.	Generate additional revenue source.
Average cost of constructing / adding conference facilities	Largest	Smallest	Medium	Medium
Were refurbishments required to create conference facilities	n/a	68.6%	54.2%	51.3%
What refurbishments were undertaken to create conference facilities	n/a	Convert / Extend	Disabled access Update décor Update furnishings Health & Safety Install modern conference equipment	Disabled access Update décor Update furnishings Health & Safety
Since opening, have refurbishments taken place	73.6%	62.4%	62.5%	52%
What refurbishments were undertaken since the opening of conference facilities	Update décor Update furnishings Health & Safety Disabled access	Upgrade furnishings Upgrade décor Convert / Extend	Update décor Update furnishings Health & Safety Disabled access	Update décor Update furnishings Health & Safety Disabled access

Table 7.60 – Conference delegates and non-delegates compared

Factor	Delegates	Non-delegates
Room type	Single room	Double
Duration of stay	One night	Weekend
Board basis	Full board	Bed & Breakfast
Rate charged	Full rack rate	Discounted
Average cost of full rack rate	£123.35 (11.5% more)	£110.62
Average cost of standard rate	£106.40 (21% more)	£87.90
Average cost of discounted rate	£97.50 (37.4% more)	£70.96
Discount offered	15.35%	20.75%
Average price charged for one night	£100.13 (23.2% more)	£81.28

Table 7.61 – Reasons for creating / supplying purpose-built conference venues

	Mean	Mode	Median	Min	Max	Standard Deviation	N=
To meet market demand	2.7	2	2	1	5	1.44	53
Based on perceived demand	2.8	2	3	1	5	1.35	53
Aim to attract business in off peak times	2.9	1	3	1	5	1.69	53
To generate economic gains for the local community	3.2	2	3	1	5	1.49	53
Other towns/destinations have added conference facilities	3.8	3	3	1	5	1.12	53
To attract high levels of delegate spending	3.1	5	3	1	5	1.55	53
To Increase hotel bookings and occupancies	3.6	5	4	1	5	1.61	53
To increase employment opportunities	3.6	5	4	1	5	1.33	53
Due to Private Sector Investment	3.9	5	5	1	5	1.57	53
To enhance urban image	4.0	5	4	1	5	1.28	53
Redevelopment of blighted areas	4.1	5	5	1	5	1.18	53
Due to Local Government Investment	4.1	5	5	1	5	1.55	53
Due to consecutive poor tourist seasons in terms of visitor numbers	4.2	5	5	1	5	1.24	53
Due to Central government investment	4.5	5	5	1	5	1.20	53

Table 7.62 – Reasons for creating / supplying hotel conference venues

	Mean	Mode	Median	Min	Max	Standard Deviation	N=
To generate an additional revenue source.	1.3	1	1	1	5	0.82	253
In response to market demand	1.8	1	2	1	5	1.02	253
To attract repeat visitation.	2.1	1	2	1	5	1.30	253
Aim to attract business in off-peak times	2.2	1	2	1	5	1.24	253
To spread the risk from a single revenue stream to multiple revenue streams	2.2	1	2	1	5	1.22	253
Perceived demand	2.5	2	2	1	5	1.23	253
Due to an increase in competition for leisure, spend which has resulted in many hotels having to generate more revenue.	2.9	3	3	1	5	1.39	253
Other hotels have added conference facilities	3.1	5	3	1	5	1.42	253
To subsidise income for the upkeep of the buildings.	3.3	5	3	1	5	1.35	253
Due to consecutive poor tourist seasons in terms of visitor numbers.	3.6	5	4	1	5	1.29	253
Due to changes in funding systems, such as a decrease in central and local government funding	4.4	5	5	1	5	1.11	253

Table 7.63 – Reasons for creating / supplying educational establishment conference venues

	Mean	Mode	Median	Min	Max	Standard Deviation	N=
Generate an additional revenue source.	2.0	1	1	1	5	1.6	24
Attract business in off-peak times.	2.7	1	3	1	5	1.51	24
In response to market demand	2.8	3	3	1	5	1.19	24
Estimated demand	3.0	3	3	1	5	1.27	24
Subsidise income for upkeep of buildings.	3.1	3	3	1	5	1.47	24
Provide facilities for academic debate at an international / national level ad standard	3.4	3	3	1	5	1.13	24
To promote local business links	3.5	3	3	1	5	1.06	24
Changes in funding systems funding	3.3	5	3	1	5	1.54	24
Other universities added conference facilities	3.9	5	4.5	1	5	1.39	24
Spread risk from single revenue stream to multiple revenue streams	4.3	5	5	1	5	1.15	24

Table 7.64 – Reasons for creating / supplying visitor attraction conference venues

	Mean	Mode	Median	Min	Max	Standard Deviation	N=
Generate an additional revenue source	1.5	1	1	1	5	1.12	71
Subsidise income for the upkeep of building	2.5	1	2	1	5	1.56	71
Single revenue stream to multiple revenue streams	2.6	1	2	1	5	1.62	71
Response to market demand	2.7	3	2	1	5	1.30	71
Attract repeat visitation	2.8	3	2	1	5	1.38	71
Estimated demand	2.9	3	3	1	5	1.35	71
Attract business in off-peak times	3.0	5	3	1	5	1.60	71
Increase in competition for leisure spend	3.7	5	4	1	5	1.45	71
Other attractions have added conference facilities	3.8	5	4	1	5	1.34	71
Due to changes in funding systems	4.0	5	5	1	5	1.40	71
Due to consecutive poor tourist seasons	4.2	5	5	1	5	1.22	71

Table 7.66 – The year of opening cross tabulated with the number of decades between opening and refurbishment

		Decades between Opening and Refurbishment					
Decade of Opening		Same	1 Decade	2 Decades	3 Decades	4 Decades	5 Decades
1950-1959	Actual	0	0	0	2	1	1
	Expected	1.3	1.4	0.7	0.4	0.1	0
1960-1969	Actual	0	0	1	5	2	0
	Expected	2.6	2.8	1.5	0.9	0.2	0.1
1970-1979	Actual	2	4	10	5	0	0
	Expected	6.9	7.3	3.8	2.3	0.6	0.2
1980-1989	Actual	5	21	9	0	0	0
	Expected	11.5	12.1	6.4	3.8	1.0	0.3
1990-1999	Actual	22	10	0	0	0	0
	Expected	10.5	11.1	5.8	3.5	0.9	0.3
2000-2002	Actual	7	3	0	0	0	0
	Expected	3.3	3.5	1.8	1.1	0.3	0.1

(N=111)

Table 7.68 – Purpose-built venues – the primary reasons for refurbishments since the venue opened

	Primary	Secondary	Tertiary
Update decor of rooms	7	6	3
Keep pace with customer demands	3	3	4
Higher standard service and comfort	3	3	
Modernisation	3	2	2
Accommodate business demand	2	2	
Add more breakout rooms	2	2	
Improve the technical facilities	2	1	1
Conference facilities out dated	2	1	
Fire damage	1	1	1
General refurbishment	1	1	2
Increase in demand of better quality accommodation	1	1	1
Maintain competitive edge	1	1	1
Add en-suite bathrooms	1	1	
Additional exhibition space	1	1	
Change of business direction	1	1	
Conference facilities too small	1	1	
Expectations	1	1	
Improve the image of the facilities	1	1	
Provide kitchen area	1	1	
Refurbish bedrooms	1	1	
Replace out of date theatre facilities	1	1	
Require more space	1	1	
Converted pool to banqueting suite	1		
Increase revenue from conferences			4
Disable facilities			2
Keep up appearances			2
Provide dedicated training rooms			1
Extend facilities to provide leisure			1
Improve standard of conference facilities			1
Keep pace with regulation			1
Maintain & improve market share			1
Maintain levels of income			1

N= 39

Table 7.69 – Hotel conference venues – the primary reasons for refurbishments since the venue opened

Reason	Primary	Secondary	Tertiary
Update décor of rooms	51	16	9
Keep pace with customer demands	8	14	11
Add no. Breakout rooms/ syndicate areas	7	8	7
Add no. Breakout rooms/ syndicate areas	7	8	7
Conference facilities out dated	7	4	2
Generate more revenue	5	8	
Conference facilities too small	5	4	3
Improve standard of conference facilities	5	3	1
Improve the technical facilities	5	20	9
Increase revenue from conferences	4	6	16
Additional guest rooms	4	4	1
Expand facilities	4	1	2
Part of company brand	3	8	2
Take over – new owners	3	1	
In response to competition	2	5	5
Maintain & Improve market share	2	3	4
Utilise space more efficiently	2	3	4
Require more space	2	1	5
Provide / renew air conditioning	2	1	2
Keep pace with regulation	1	4	3
Change of business direction	1	2	2
Improve conference product	1	2	
Ease of use for staff/ remove pressure off staff	1	2	1
Improve lighting and ambiance	1		6
Complete work already started	1		1
Accommodate business demand	1		
Add a ballroom	1		
Compliment existing facilities	1		
Convert banqueting suite to restaurant + lounge	1		
Convert offices to function rooms	1		
Convert one room into three	1		
Old building maintenance	1		
Keep up appearances		6	1
Provide kitchen area		1	3
Lack of local facilities		1	
Loss of Tourism		1	
Disable facilities			4
Add additional bedrooms			1
Enlarge the database of our clients			1
Improve standard of conference facilities			1
Provide eating area			1

N=160

Table 7.70 – Visitor attraction conference venues – the primary reasons for refurbishments since the venue opened

Reason	Primary	Secondary	Tertiary
Update décor of rooms	8	2	7
Improve the technical facilities	5	6	2
General refurbishment	3	5	6
Keep pace with customer demands	3	4	5
Improve standard of conference facilities	3	2	
Improve the image of the facilities	2	1	2
Expand facilities	2		
Add no. breakout rooms	1	1	2
Increase capacity to match demand	1		1
Increased competition in market place	1		1
Accommodate business demand	1		
Change use of room	1		
Conference facilities too small	1		
Extend stage	1		
Increased demand for restaurant capacity	1		
Keep pace with regulation	1		
New office building	1		
Require more space	1		
Utilise space more efficiently	1		
Keep up appearances		3	
Increase revenue from conferences		2	1
Maintain & improve market share		1	1
Maintain competitive edge		1	1
Move meeting out of main museum		1	1
Refurbish seating		1	1
Add bar		1	
Attract new clientele		1	
Dedicated training rooms – customer requirements		1	
Disable facilities		1	
Greater flexibility		1	
Improve safety standards		1	
In response to competition		1	
Provide higher delegate number		1	
Release pressure off staff		1	
Attract external business			1
Attract wider range of functions			1
Convert banqueting suite to restaurant + lounge			1
Improve conference product			1
Old building maintenance			1

N=39

Table 7.71 – Educational establishments conference venues – the primary reasons for refurbishments since the venue opened

	Primary	Secondary	Tertiary
Update decor of rooms	6	2	
Improve the technical facilities	4	3	1
Improve standard of conference facilities	1	1	
Conference facilities out dated	1		1
Additional guest rooms	1		
Expand facilities	1		
Provide eating area	1		
Add additional family rooms		2	
Modernisation		2	
Add no. breakout rooms		1	
General refurbishment		1	
Improve conference product		1	
Keep pace with customer demands		1	
Build a new building		1	
Increase revenue from conferences			5
General refurbishment			2
Generate more revenue			2
In response to competition			1
Maintain competitive edge			1
Utilise space more efficiently			1

N=15

Table 7.74 – Key factors that may prohibit development of purpose-built venues

	Mean	Mode	Median	Minimum	Maximum	Standard Deviation	Count
Lack of break-out rooms / facilities	3.36	1	2	1	8	2.33	19
Increased competition from other conference facilities	3.74	3	3	1	9	2.81	19
Increasing costs	4.05	3	4	1	10	2.32	22
Insufficient conference lead times	4.13	1	4	1	8	2.47	16
Lack of technical equipment	5.5	6	6	1	10	2.28	16
Reduced demand for conference facilities	5.83	5	6	1	10	2.71	18
Operating problems	6.21	4	6.5	1	10	3.09	14
Lack of trained staff	7.0	9	8	1	10	2.54	14
Difficulty of attracting repeat meetings / delegates	8.14	10	8.5	1	10	2.44	14

Table 7.75 – Key factors that may prohibit development of hotel conference venues

	Mean	Mode	Median	Minimum	Maximum	Standard Deviation	Count
Increased competition from other conference facilities	3.56	1	3	1	10	2.52	85
Lack of break-out rooms / facilities	4.03	11	3	1	10	2.79	86
Difficulty of attracting repeat meetings / delegates	5.35	6	6	1	10	2.70	75
Reduced demand for conference facilities	5.45	2	5	1	10	2.86	80
Lack of trained staff	5.76	9	5.5	1	10	2.96	78
Lack of technical equipment	5.91	10	6	1	10	3.32	76
Insufficient conference lead times	5.99	9	6	1	10	2.76	72
Increasing costs	6.38	4	7	1	10	2.63	71
Operating problems	6.96	8	8	1	10	2.57	71

Table 7.76 – Key factors that may prohibit development of educational establishment conference venues

	Mean	Mode	Median	Minimum	Maximum	Standard Deviation	Count
Increased competition from other conference facilities	4.8	4	4	2	10	2.28	5
Lack of trained staff	4.86	2	6	1	9	3.18	7
Operating problems	4.89	1	5	1	10	3.57	9
Increasing costs	5	8	6	1	8	3.32	5
Reduced demand for conference facilities	5.33	3	3.5	3	10	3.27	6
Lack of technical equipment	5.83	7	7	2	8	2.64	6
Lack of break-out rooms / facilities	6.14	4	7	4	10	2.27	7
Difficulty of attracting repeat meetings / delegates	7.33	5	7	5	10	2.58	6
Insufficient conference lead times	8.4	9	9	7	9	0.89	5

Table 7.77 – Key factors that may prohibit development of visitor attractions conference venues

	Mean	Median	Mode	Minimum	Maximum	Standard Deviation	Count
Increased competition from other conference	4.29	4	1	1	10	2.92	31
Lack of break-out rooms / facilities	4.39	3	2	1	10	3.17	31
Insufficient conference lead times	5.17	5	5	1	10	2.64	23
Lack of technical equipment	5.65	5	4	1	10	2.26	26
Reduced demand for conference facilities	6.04	7	3	1	10	3.14	26
Lack of trained staff	6.51	7	10	1	10	3.15	27
Difficulty of attracting repeat meetings / delegates	6.65	7	10	1	10	2.99	23
Increasing costs	6.67	7	5	1	10	2.39	25
Operating problems	6.76	8	10	1	10	3.09	25

Table 7.79 – The reasons for future refurbishment activity at purpose-built conference venues

	Primary	Secondary	Tertiary
Update décor of rooms	5	2	1
Increase exhibition meeting room capacity	3		
General refurbishment	2	2	1
Additional guest rooms	2		
Keep pace with regulation	2		
Keep pace with customer demands	1	2	2
Improve the technical facilities	1	2	
Modernisation	1	2	
Add more breakout rooms	1	1	1
Conference facilities too small	1	1	1
Conference facilities out dated	1	1	1
Additional capacity in main halls	1		
Maintain & improve market share	1		
Part of company brand	1		
Expand facilities		3	2
Disable facilities		1	1
Provide more space for support facilities		1	1
Additional office meeting space		1	
Generate more revenue		1	
Improve conference product		1	
Improve foyer/ public areas		1	
Keep up appearances		1	
Additional exhibition space			1
Improve standard of conference facilities			1
Increase revenue from conferences			1
Provide more space for support facilities			1
Utilise space more efficiently			1

N=23

Table 7.80 – The reasons for future refurbishment activity at hotel conference venues

Reason	Primary	Secondary	Tertiary
Update decor of rooms	18	10	6
Keep pace with customer demands	8	7	8
General refurbishment	8	7	4
Improve the technical facilities	6	10	11
Generate more revenue	5	9	2
Add no. breakout/ syndicate rooms	5	5	2
In response to competition	5	4	
Modernisation	4	3	1
Require more space	4	2	3
Part of company brand	3	2	1
Conference facilities out dated	3		2
Conference facilities too small	3		2
Improve standard of conference facilities	2	2	2
Expand facilities	2	1	1
Take Over – New Owners	2		
New Conference Foyer	2		
Additional guest rooms	2		
Extend facilities to provide leisure	1	3	
Improve lighting	1	2	
Increase revenue from conferences	1	1	4
Keep up appearances	1	1	3
Improve conference product	1		1
Convert one room into three	1		1
Accommodate business demand	1		1
Provide kitchen area	1		
Provide eating area	1		
Maintain & Improve market share		3	3
Keep pace with regulation		3	3
Attract larger conferences		2	1
Ease of use for staff		1	2
Complete work already started		1	2
Disable facilities		1	1
Change of business direction		1	1

Greater yield management		1	
Convert banqueting suite to restaurant + lounge		1	
Compliment existing facilities		1	
Utilise space more efficiently			3
Convert offices to function rooms			2
Provide air conditioning			1
Old building maintenance			1
Enlarge the database of our clients			1

N=91

Table 7.81 – The reasons for future refurbishment activity at visitor attraction conference venues

Reason	Primary	Secondary	Tertiary
Improve the technical facilities	5	1	1
Improve standard of conference facilities	4	2	1
Update decor of rooms	4	1	2
Add no. breakout rooms	2		
Keep pace with customer demands	1	3	6
Enlarge the database of our clients	1	3	
Increase revenue from conferences	1	2	4
Maintain & improve market share	1	2	
Release pressure off staff	1	1	
In response to competition	1	1	
Improve the image of the facilities	1	1	
Improve access and public areas	1	1	
Keep pace with regulation	1		2
Utilise space more efficiently	1		1
Re-carpet facilities	1		
Provide better parking	1		
New office building	1		
Move meeting out of main museum	1		
Keep up appearances	1		
Installation of accommodation	1		
Increase facilities over-looking pitch	1		
Expand facilities	1		
Conference facilities too small	1		
Compliment existing facilities	1		
General refurbishment		3	4
Modernisation		3	
Provide a visitor centre		1	1
Conference facilities out dated		1	1
Require more space		1	
Redevelop part of site		1	
Provide kitchen area		1	
Apartments being built		1	

Extend stage		1	
Change of business direction		1	
Attract new clientele		1	
Improve conference product			2
Refurbish seating			1
Maintain competitive edge			1
Increase capacity to match demand			1
Generate more revenue			1
Complete work already started			1
Change of business direction			1

N=35

Table 7.82 – The reasons for future refurbishment activity at educational establishment conference venues

	Primary	Secondary	Tertiary
Update decor of rooms	4	4	1
Improve the technical facilities	3	1	
General refurbishment	2		3
Increase revenue from conferences	1	1	
Improve standard of conference facilities	1	1	
Add more en-suite facilities	1		1
Keep up appearances	1		
Keep pace with customer demands		1	2
Maintain & improve market share		1	1
Provide higher delegate number		1	
Modernisation		1	
Convert offices to function rooms		1	
Additional exhibition space		1	
Expand facilities			2
Generate more revenue			1
Accommodate business demand			1

N=13

Glossary

AA	Automobile Association
AACVB	Asian Association of Convention and Visitor Bureaux
AECC	Aberdeen Exhibition and Conference Centre
ASAE	American Society of Association Executives
BACD	The British Association of Conference Destinations
BCMTS	British Conference Market Trends Survey
BIC	Bournemouth International Centre
BTA	British Tourism Authority
BUAC	British Universities Accommodation Consortium
C&I	Conferences & Incentives
CBD	Central Business District
CINET	Computerised Information Network
CITHCS	Conference Incentive Travel Hotel Chain Survey
CVB	Conference Visitor Bureaus
EFCT	European Federation of Conference Towns
EICC	Edinburgh International Conference Centre
ETC	English Tourism Council
IACB	International Association of Conference Bureaus
IACVB	International Association of Convention and Visitor Bureaus
ICC	International Convention Centre (Birmingham)
ICCA	International Congress and Convention Association
IHRA	International Hotel and Restaurant Association
IMI Glossary	International Meetings Industry Glossary
LCCICET	London Chambers of Commerce and Industry Commercial Educational Trust
MAPE	Means Absolute Percentage Error
MIA	Meetings Industry Association
MICC	Manchester International Convention Centre
MICE	Meetings, Incentives, Conferences and Exhibitions
NEC	National Exhibition Centre
NTBs	National Tourist Boards
ONSIPS	Office for National Statistics International Passenger Survey
PCMA	Professional Convention Management Association
PwC	PricewaterhouseCoopers
RAC	Royal Automotive Club
SWOT	Strengths, Weaknesses, Opportunities and Threats
SERVQUAL	Service Quality model
TQM	Total Quality Management
TTI	Travel & Tourism Intelligence
UIA	Union of International Association
WTO	World Trade Organisation
WTTC	World Travel and Tourism Council

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