
Convention Center Design & Requirements Study

Survey of Leading Convention & Exhibition Producers on Convention Center Design & Functionality Requirements with Opinion of Contiguous & Non-Contiguous Hall Space

With San Diego Convention Center Clients & Prospects Response Breakouts

Developed for



By



Divisions of



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Introduction

This report by Red 7 Media Research & Consulting provides the San Diego Convention Center Corporation with an analysis of leading convention, exhibition and conference producer convention center requirements. The data source is a survey of executives at leading convention, exhibition and conference producer and planner organizations. The survey was emailed to a total of 1,576 event producer professionals reflecting a cross-section of the convention, exhibition and conference management industry and 129 responded for an 8.1% response rate.

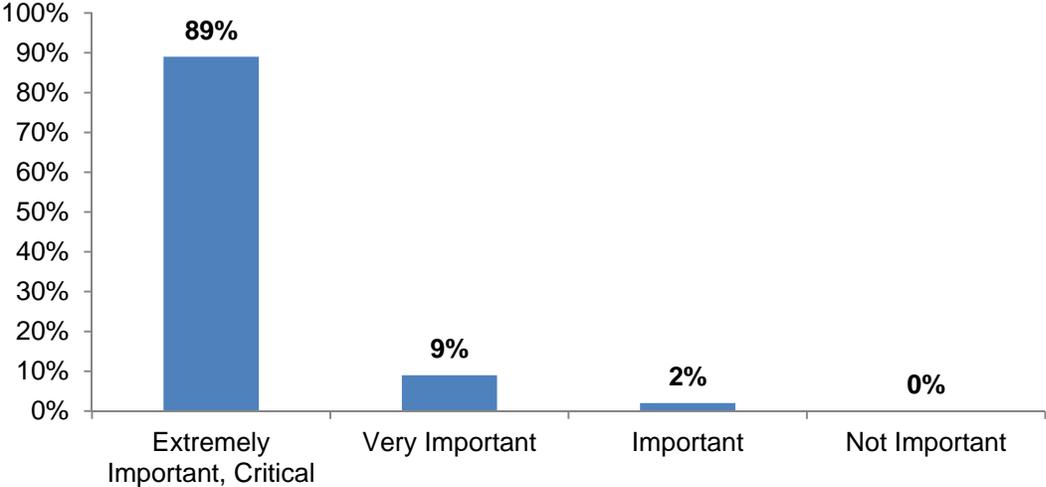
Important Notes: This report also provides a separate breakout of only the responses from San Diego Convention Center clients and key prospects. **The San Diego Convention Center client and key prospects survey response rate is 19.5%.** This is based on 64 event producer respondents out of a list of 328 groups provided by the Convention Center to the survey provider. This response rate percentage is at the high end of what is typical for market research email surveys reflecting strong data validity.



Executive Summary

When analyzing the responses from San Diego Convention Center clients and key prospects only the percentage that say it is extremely important/critical or very important to have contiguous exhibition halls in a single venue complex when booking their major events is 98%. Considering the entire group of responding event producers, a significant 95% of convention, exhibition and conference producers say it is extremely important/critical or very important to their organization to have contiguous exhibition halls in a single venue complex.

San Diego Convention Center Clients and Prospects on the Importance of Contiguous Exhibition Halls in a Single Venue Complex When Booking Major Conventions



Eighty-nine percent of the San Diego Convention Center clients and key prospects that responded to the survey say they are not likely to select a host city if the primary convention center is not a single facility with contiguous exhibition halls.

Having contiguous halls in a single convention center building is an absolutely critical, must have element to book for 94% of the San Diego Convention Center clients and key prospects.

Ninety-five percent of the respondents chose the answer option they "absolutely would not book two venues that are six city blocks apart".

About the Respondents: 63% of the San Diego Convention Center clients and prospects work for associations that host conventions.

About the Respondents: Fifty-five percent of the San Diego Convention Center clients and prospects require up to 300,000 gross square feet of exhibit space for their largest, most important event. An additional 19% need between 300,001 and 500,000 gross square feet.

Survey Results

When analyzing the responses from San Diego Convention Center clients and key prospects only, the percentage that say it is extremely important/critical or very important to have contiguous exhibition halls in a single venue complex when booking their major events is 98%. Considering the full response of all event producers, a significant 95% of convention, exhibition and conference producers say it is extremely important/critical or very important to their organization to have contiguous exhibition halls in a single venue complex.

1.) How important is it to your organization to have contiguous exhibition halls in a single venue complex when booking your major convention?

	All %	SDCC Clients
Extremely important, critical	81%	89%
Very Important	14%	9%
Important	3%	2%
Somewhat important	0%	0%
Not important	2%	0%

Eighty-seven percent of all of the survey respondents say they are not likely to select a host city if the primary convention center is not a single facility with contiguous exhibition halls. This percentage increases to 89% when analyzing the San Diego Convention Center clients and key prospects separately.

2.) How likely is your organization to select a host city if the primary convention center is not a single facility with contiguous exhibition halls requiring you to use two separate facilities not directly adjacent or linked?

	All %	SDCC Clients
Not likely	87%	89%
Moderately likely	10%	8%
Likely	1%	1.6%
Highly likely	1%	0%
Extremely likely	1%	1.6%

Having contiguous halls in a single convention center building is an absolutely critical, must have element to book for 94% of the San Diego Convention Center clients and key prospects that responded to the survey.

3.) Is having contiguous halls within a single convention center building an absolutely critical, must have element to book your primary event?

	%	SDCC Clients
Yes	87%	94%
No	13%	6%

Ninety-five percent of the respondents chose the answer option they "absolutely would not book two venues that are six city blocks apart".

4.) Considering your key events, how likely is your organization to book the following type of venue complex when considering your exhibition space requirements and service needs? Facility Situation: Two separate event buildings, separated by a distance of six City Blocks from each other; with one of the buildings a sports stadium with exhibition space, and the other a major purpose-built convention center.

	All %	SDCC Clients
Absolutely would not book two venues that are six city blocks apart	95%	95%
Somewhat likely to book	4%	3%
Likely to book	1%	2%
Very likely to book	0%	0%
Extremely likely to book these two buildings for one event	0%	0%

None of the survey respondents indicated they regularly book sports stadiums that build or provide exhibition halls or host events inside the stadium areas during non-sporting event days.

5.) What is your opinion of sports stadiums that build exhibition halls and/or host events inside the stadium areas during non-sporting event days?

	% All	SDCC Clients
We regularly book these types of sports facilities	0%	0%
We would never book this type of facility to host our key conventions, exhibitions/tradeshows, or conferences	28%	33%
We may consider booking this type of facility but would need to know more information	39%	34%
No experience / no opinion	33%	30%
Other	1%	3%

Other verbatim response:

- Too scary as sports seasons are only determined a year out and we book many years in advance. plus they would not block the space for the length of time we need it for move in /show/move out.

Only 18% of the San Diego Convention Center clients and key prospects say they have held a key event in a joint use facility such as a sports complex, stadium or arena.

6.) Has your organization ever held a key event in a "joint use facility" meaning a facility besides a purpose-built convention center or exhibition hall such as a sports complex, stadium, arena or other facility?

	All %	SDCC Clients
Yes	26%	18%
No	74%	82%

If Yes, please describe your experience? Verbatim responses

- A parking lot. Never again.
- Arena.
- As long as the meeting space is professional this has not been a detractor for us. It would be a benefit if a sporting event could be offered to our attendees at a discounted rate for having booked the venue.
- Back in the early 80's, used the Houston Astrodome. Lotsa work for a small space.
- Due to size requirements we have done so in the past, also in some cases it adds an interesting dimension to an evening event or so.
- For special events.
- In addition to using a convention, we have used arenas for other events such as concerts/shows.
- Indy - It was good except they had to provide gas for exhibitors.
- It was a standalone sports facility, using the floor as an exhibit hall and meeting space for sessions, connected to a hotel (Superdome/Hyatt)
- It was okay..but the facility was rarely used.
- January 2014 will be our first time to do this in Indy.
- Not ideal; space too big (too open), too far from main expo hall
- Ok experience. If they are not trained in exhibitions, they are usually not the perfect scenario.
- Overseas we have held events in university facilities.
- Passenger ship terminal.
- Positive when all of the vendors work together.
- Very difficult to create exhibit layout.
- We are holding our Expo in an Arena for the first time this October.
- We have used sports stadiums for events - Ranger Stadium, Lambo Field.
- We use convention center w/HQ hotels next door or connected to the convention center. We have not used a stadium or arena.
- We utilize the LVH in Las Vegas in conjunction with the LVCC

If No, why not? Verbatim responses

- Too large of a venue.
- Haven't needed to yet.

Sixty-three percent of the San Diego Convention Center clients and key prospect respondents work for associations with conventions. For the entire response data set, over half of the respondents work for associations that run conventions, and 28% are with exhibition and trade show producers.

7.) What types of events do you own, manage or plan? (Please check all that apply.)

	All %	SDCC
Association Convention	53%	63%
Trade Exhibition/Trade Show	28%	14%
Conference	12%	16%
Major Corporate Meeting	0%	0%
Meeting/Seminar	0%	0%
Consumer Show	2%	3%
Other	5%	5%

Other verbatim responses:

- Conference / Trade show
- Association convention and trade show exhibition
- Convention with Trade Show
- World-leading Congress and Exhibition
- B2B CE-based convention (trade show & conference)
- Sporting Event

Fifty-five percent of the San Diego Convention Center clients and prospects require up to 300,000 gross square feet of exhibit space for their largest, most important event. An additional 19% need between 300,001 and 500,000 gross square feet. Considering the entire group of respondents finds that 59% require up to 300,000 gross square feet of exhibit space for their largest, most important event. The rest of the respondent group require over 300,000 gross square feet of exhibit space.

8.) What is the size of your largest, most important event in terms of the Total Gross Square Feet of Exhibit Space required?

	All %	SDCC Clients
Less than 75,000 gross sf of exhibit space	10%	6%
75,001 to 100,000	12%	11%
100,001 to 200,000	22%	19%
200,001 to 300,000	15%	19%
300,001 to 400,000	7%	6%
400,001 to 500,000	10%	13%
500,001 to 750,000	12%	14%
750,001 to 1 million	7%	11%
Over 1 million gross sf of exhibit space	5%	2%

9.) Do you have any other comments or questions related to this issues of contiguous vs. non-contiguous exhibition space, or booking more than one convention center and exhibit hall to host your key conventions, exhibitions and conferences?

Verbatim responses

- Absolutely would not book separate exhibit venues.
- Concerns about access to meeting rooms, ambiance of entry areas, technology available, movement of audience. Splitting anything is bad. Would not ever book two spaces to divide audience.
- Contiguous is critical. Even San Fran and Phoenix with halls across the street are unsatisfactory.
- Contiguous needs to be defined in your questions. I consider the two building in Orlando (West and North/South) as contiguous although they may be "six blocks" apart. They are on the same campus. Two buildings that are six blocks apart that are not on the same campus would be problematic in my view.... exhibitor perceptions, meeting room issues, transportation requirements.
- Don't use terms like "contiguous" without clarifying what you mean & don't use feet if you are asking an international audience - be aware of your target group!
- Educational session rooms and a large room for the general session holding 3 - 5,000 is critical

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- Face to Face meetings are meant to bring people together. As we market to the Gen Y generation to attend our meetings, they want these areas to be brought together, just like we as Gen Y and Baby Boomers. Facilitate the experience and bring people together easily, don't make it difficult or you will lose them and have unhappy attendees, exhibitors and planners.
 - For most trade shows, not an attractive option. But it depends on the type of displays, such as large construction equipment or large products that can be properly displayed in a stadium or arena -- such as helicopters or corporate aircraft. For some shows, the non-contiguous space or a venue other than traditional convention center works well. There's just not very many of this type of event.
 - Having a sports stadium in the middle of the convention center would cause major disruption to our meeting. We would not want fans (especially those that have been drinking) mixed in with our very serious attendees. OK if events are evening but Saturday or Sunday during the day would be horrible for us.
 - Large convention hotels with built-in exhibit hall up to at least 100,000 sq. ft. is the ideal for our conferences of 3,500 with 150 10x10 exhibit booths.
 - Non-contiguous space poses problems for planners, who need to ensure that their exhibitors receive maximum exposure and that all feel they are on an equal playing field. It adds more costs and complexity to planning and execution.
 - Not contiguous - but want to comment about WIFI - we are in the mobile and technology space. Convention Centers need to get with the 21st century and provide wifi - this separate charge and "smart cities" type vendors is an annoyance, and frankly an outdated model.
 - Not only in the States but many venues in Europe have same problem with non-contiguous space and not meeting rooms as well!!
 - Our show floor includes more than exhibit space. We need at least 1 million contiguous to go anywhere.
 - Our top criteria for selecting a venue for our event is contiguous space. We do not consider venues that do not have this.
 - Proving our attendees with a positive meeting experience and providing attendee traffic to our exhibition is most important to us - we must have contiguous exhibit space to achieve these goals.
 - Six blocks apart is crazy.
 - We also base our decision as to how much additional meeting space the venue has in addition to exhibition space.
 - We can't fit in San Diego without the expansion. There is absolutely no way our Board of Directors would even remotely ever consider splitting up our show floor. We tried 2 halls in other cities and the feedback was bad from attendees and exhibitors. We need 750,000 of all one level all one hall contiguous space. It is a deal breaker for us. Our show brings in 20,000 people.

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- We currently use a city with non-contiguous exhibit space, always a problem/challenge, both from show management and with exhibitors---many complaints, and difficult to control traffic in separate halls....not good!
 - We regularly use Moscone Center, but only because we have excellent attendance for our city wide convention.
 - We use to hold our meeting at the Hynes Convention Center in Boston. However, now that we would require both of their Exhibit Halls, which are on separate floors we will no longer book there. So...six city blocks would be a huge stretch.
 - Would never use a sports complex or separate facilities.

Methodology

In September 2013, Red 7 Media Research & Consulting and EXPO magazine sent a survey on convention center design requirements to leading convention, exhibition and conference producers. The survey was emailed to 1,576 event producer professionals and 129 responded for an 8.1% response rate. Some of the data tables may not add to exactly 100% due to rounding.

Important Notes: This report also provides a separate breakout of only the responses from San Diego Convention Center clients and key prospects. **The San Diego Convention Center client and key prospects survey response rate is 19.5%.** This is based on 64 event producer respondents out of a list of 328 groups provided by the Convention Center to the survey provider. This response rate percentage is at the high end of what is typical for email surveys. According to Constant Contact, 10% to 20% is a common email survey response rate. Response rates can vary widely depending on factors such as survey topic, length, lists used and incentives.

Responding Organizations

- 1105 Media
- AABB American Association of Blood Banks
- AARP
- About Face Productions
- Advanstar
- Air Conditional, Heating and Refrigeration Expo
- Air Force Association
- Airborne Law Enforcement Association
- AmCon
- American Academy of Dermatology
- American Academy of Ophthalmology
- American Academy of Orthopaedic Surgeons
- American Academy of Pediatric Dentistry
- American Alliance of Museums
- American Association of Cancer Research
- American Association of Cosmetology Schools
- American Association of Critical-Care Nurses
- American Association of Diabetes Educators
- American Association of Neurological Surgeons
- American Association of Orthodontists
- American Chemical Society
- American College of Cardiology
- American Football Coaches Association
- American Institute of Architects
- American Optometric Association
- American Osteopathic Association
- American Pharmacists Association
- American Public Transportation Association

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- American Public Works Association
 - American Society for Aesthetic Plastic Surgery
 - American Society of Human Genetics
 - American Society of Plastic Surgeons
 - American Society of Safety Engineers
 - American Specialty Toy Retailing Association
 - American Urological Association
 - AMT / Association For Manufacturing Technology
 - ASM International / American Society for Metals
 - Association for Unmanned Vehicle Systems
 - Association of Equipment Manufacturers
 - Aviation Week Events / Penton
 - BCD M&I
 - Bowling Proprietors Association of America
 - California Association for the Gifted
 - Club Managers Association of America
 - Coastal Shows
 - Computer Associates
 - DIA Drug Information Association
 - Easter Seals
 - Electrical Apparatus Service Assn.
 - Emerald Expositions (formerly Nielsen)
 - ESRI
 - EUPEC Energy, Utility & Environment Conference
 - George Little Management
 - GS1 US
 - HealthAchieve
 - Helicopter Association International
 - Hematology
 - IMN Solutions
 - Institute of Food Technologists
 - International Conference on Automated People Movers
 - International Reading Association
 - Investment Management Consultants Association
 - LPL Financial
 - Management Solutions Plus
 - Medical Library Association
 - Messe Dusseldorf North America
 - Museum Store Association
 - National Association for Search and Rescue
 - National Association of Bilingual Education
 - National Association of College and University Business Officers
 - National Association of College Stores
 - National Association of Credit Management
 - National Association of Home Builders
 - National Association of Realtors
 - National Business Aviation Association
 - National Cattlemen's Beef Association

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- National Council for the Social Studies
 - National Demolition Association
 - National Ornamental & Miscellaneous Metals Association
 - National University
 - National Urban League
 - National Sheriffs Association
 - Natural Products Association
 - Natural Products Expo / New Hope Natural Media / Penton
 - NBM Shows
 - New Car Dealers Association San Diego
 - NIGP: The Institute for Public Procurement
 - North American Association of Food Equipment Manufacturers
 - Oasis Gift Shows
 - Penton Media
 - Photo Marketing Association International
 - Pittcon
 - Produce Marketing Association
 - Public Risk Management Association
 - Questex
 - RDP Group
 - RFID Journal
 - RIMS
 - SAP
 - Scientific Societies
 - SEMI
 - Siemens
 - SmithBucklin
 - SnowSports Industries America
 - Society for Laboratory Automation and Screening
 - Society for Neuroscience
 - Society for New Communications Research
 - Society of Critical Care Medicine
 - Society of Hospital Medicine
 - Society of Human Resource Management
 - Society of Thoracic Surgeons
 - Stellato Solutions
 - Techweb
 - TESOL Teachers of English to Speakers of Other Languages
 - The Optical Society
 - True Value Hardware
 - UBM
 - Ultratech Imaging, Inc.
 - Union of Reform Judaism
 - Virgo Publishing
 - Western Veterinary Conference
 - World at Work
 - World Petroleum Council

About Red 7 Media Research & Consulting

Red 7 Media is a division of Maryland-based event producer and business media company, Access Intelligence, LLC. Red 7 Media Research & Consulting helps leaders in the event, venue and media industries analyze data and information to make more informed business decisions. We leverage our trusted brands, industry leading data, and market expertise to provide clients with insights and improve their business performance. Red 7 Media Research & Consulting works with all of the company's industry leading brands and magazines including *EXPO*, *Event Marketer* and *Folio*. We also provide data and analysis as a service of the Event Marketing Institute and run several conferences and numerous websites.

Red 7 Media Research & Consulting is unique in maintaining expertise in the following business and consumer event and media industry sectors:

- Conventions, exhibitions and conferences
- Convention centers and hotels
- Event marketing and corporate events
- Magazine and information publishing and audience development
- Online and digital media and marketing

Red 7 Media's research and consulting services include:

- Benchmark and best practices studies
- Market size and market share analysis
- Industry growth analysis and forecasts
- Industry trend analysis
- Venue feasibility studies
- Attendee and exhibitor surveys
- Reader and advertiser surveys
- Market surveys
- Marketing consulting
- Strategic advisory
- White papers and special reports
- Presentations, meeting facilitation and focus groups
- Syndicated research

Our team has conducted thousands of assignments and projects for many of the leading event, venue and media organizations around the world as well as in the financial and consulting communities. Each project and assignment is confidential and tailored to our client's exact needs and requirements.