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A Simpleview Consulting Company

Simpleview Sales Quarterly - July | 2022

TRENDS & INSIGHTS FOR DESTINATIONS





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SIMPLEVIEW SALES QUARTERLY | JULY 2022

Introduction

Welcome to the first edition of the **Simpleview Sales Quarterly** - July | 2022

What is the **Simpleview Sales Quarterly?**

This report is the most comprehensive review of the DMO industry's sales performance. It illustrates how the leads and booking patterns for meetings and events have changed and evolved since the widely accepted benchmark of 2019.

Throughout the report, we aim to understand the 2022 progress made since the COVID-19 pandemic began in March 2020. We also take a look forward at the health of the DMO's critical lead pipeline.

Our goal is to provide DMOs with the information needed to support their sales strategy.

Welcome to the first edition of the **Simpleview Sales Quarterly** - July | 2022

How should DMOs **use this report**?

First, DMOs should understand the progress and pipeline health for the aggregated overview of U.S. and Canadian DMO sales data. Second, there are **two sections** where DMOs can find relevant progress and pipeline health datasets analyzed by:

1

DMO categories

(as measured by the GSF of exhibit space in convention centers)

2

Regions

Whether you're interested in examining the progress of destinations with large convention centers or interested in a region's pipeline health, you'll find relevant datasets organized for you that you can quickly reference.

Please note: if a specific page or chart is shared with stakeholders, Simpleview LLC should be credited as the source.



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Report Highlights

Report **highlights**



PROGRESS

Bookings for the first half of 2022 still lag 2019 bookings by

30%



June 2022 had

3%

MORE LEADS
than June 2019



PIPELINE HEALTH

Leads for the first half of 2022 are within

6%
of 2019

Event cycles have shortened by

3
months



The #1 market is

SPORTS

& it has more leads in the 2022 pipeline than 2019 had for both hotel meetings and convention center events.

There are over

2,300

more hotel leads in the pipeline for July to December 2022 arrivals than for the same period in 2019.



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Report Navigation



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WATCH FOR THESE **KEYWORDS**:



PROGRESS



PIPELINE HEALTH



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Methodology

Methodology

We aggregated Simpleview CRM data of **215 DMOs** that generated 50 or more leads in 2019 and had leads each year in 2019, 2020, 2021, and 2022. We excluded events with fewer than 10 rooms on peak.

In addition to the industry aggregate analysis, **we defined two segmentations as follows:**

DMO category:

- **Category A:** no convention facility
- **Category B:** less than 100,000 exhibit gross square feet (GSF)
- **Category C:** 100,000-499,000 exhibit GSF
- **Category D:** 500,000+ exhibit GSF

Regional:

- Canada
- Midwest
- Northeast
- South/Southeast
- West/Pacific

Terminology

LEAD - Leads can be both a status level AND the actual inquiry sent to the hotel(s)/convention center. However, for this report, leads are defined as events with a “lead created date” that has not converted to either a definite or lost status.

BOOKING - Bookings are considered contracted events and designated by a status of “definite” with a “date definite.”

HOTEL MEETINGS AND CONVENTION CENTER EVENTS -

Convention center events are distinguished by “CC = Yes” in CRM. Conversely, hotel meetings are distinguished by “CC = No.”

EVENT CYCLE AND SALES

PRODUCTION CYCLE - Event cycle refers to the length of time from the beginning of sourcing (lead create date) to event arrival (meeting start date). The sales production cycle refers to the length of time from the beginning of sourcing (lead create date) to when the lead is converted to definite status (date definite).

MARKET SEGMENT - CRM lead segments were converted into the MINT+ key classifications. Over 75% of CRM leads were successfully converted to one of 19 key classifications for analysis.

Progress



Throughout this quarterly report, we gauge **year-to-date progress compared to performance pre-pandemic, using 2019 as an index**. Additionally, we will illustrate **monthly progress made in 2020, 2021, and 2022 through June**. Specifically, we will touch on the monthly number of leads and explore bookings by reviewing the number of bookings, room nights, attendance, and average peak room.

Progress sections answer the following questions:

LEAD VOLUME — How many leads, lead room nights, and lead attendance have been created monthly from January to June 2022? **What kind of progress have we made compared to previous months, quarters, and years?**

BOOKING VOLUME — How many events, room nights, and attendance have we confirmed definite monthly from January to June 2022? **What kind of progress have we made compared to previous months, quarters, and years?**

Pipeline health



The DMO pipeline serves as a bellwether for future production. The questions are: **do we have enough business in our pipeline, and will we realize our sales production goals?**

Our pipeline health is described through the following measures and dimensions. **Measures are presented as the percentage change from January to June 2019**, when lead activity was robust in the industry, to the current reporting period of January to June 2022.

Pipeline health sections answer the following questions:

LEAD VOLUME — How much business in terms of leads, room nights, and attendance do we have in the pipeline compared to 2019? What is the impact of peak room averages on overall lead room nights?

EVENT CYCLE & SALES CYCLE — The event cycle refers to the length of time from the beginning of sourcing (lead create date) to event arrival (meeting start date). The sales cycle refers to the length of time from the beginning of sourcing (lead create date) to when the lead is converted to definite status (date definite). How are these two cycles changing, and what is the impact on future years?

MARKET SEGMENTS — For the strongest market segments, how does our 2022 pipeline compare to 2019? Does our pipeline continue to align with these segments in future years?



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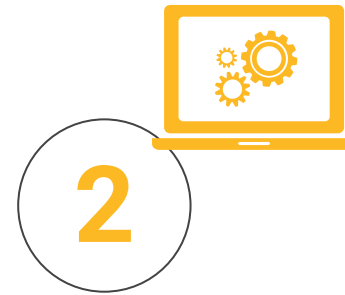
Industry Aggregate



Progress



Good news
about monthly
lead volume



Bookings still have a
way to go to catch
up to 2019



Good news about monthly **lead volume**

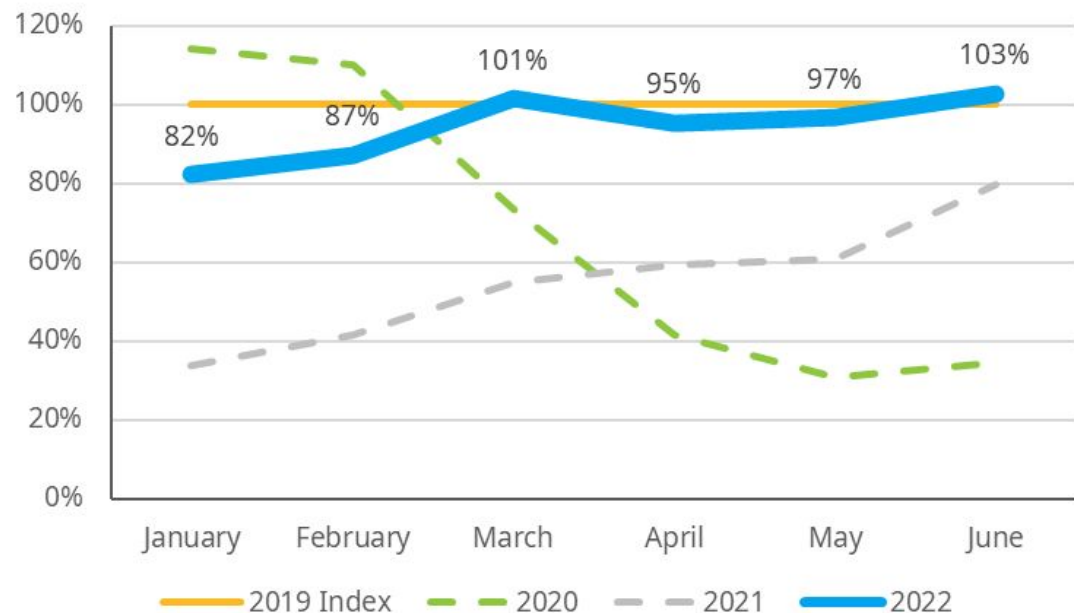
From January to June 2022, **DMOs have made substantial progress by generating almost as many leads as the first six months of 2019.**

In Q2 of 2022, DMOs trailed Q2 of 2019 by only 1.8%, and for the month of June 2022 leads were 103% of June 2019 index.

This represents a significant improvement over 2021 and an improvement in 2022 quarter-over-quarter by 2.7%.

Monthly **number of leads** through June 2022

Percentage of 2019 index





Here's what we're seeing ...

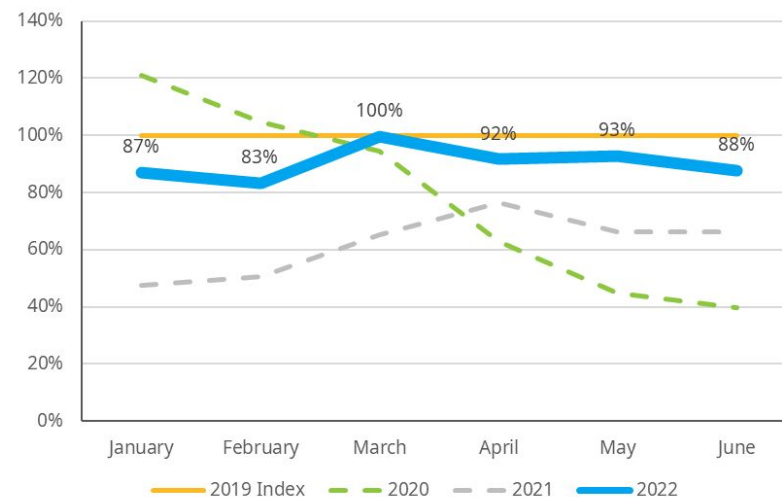
While the number of leads are almost back to 2019 levels, **lead room nights** have not quite returned.

In the second quarter of 2022, DMOs trailed the second quarter of 2019 by 10.4%, suggesting smaller-sized events.

Monthly lead attendance can be inconsistent due to the event type of leads, multi-year leads being entered at the same time, as well as other factors.

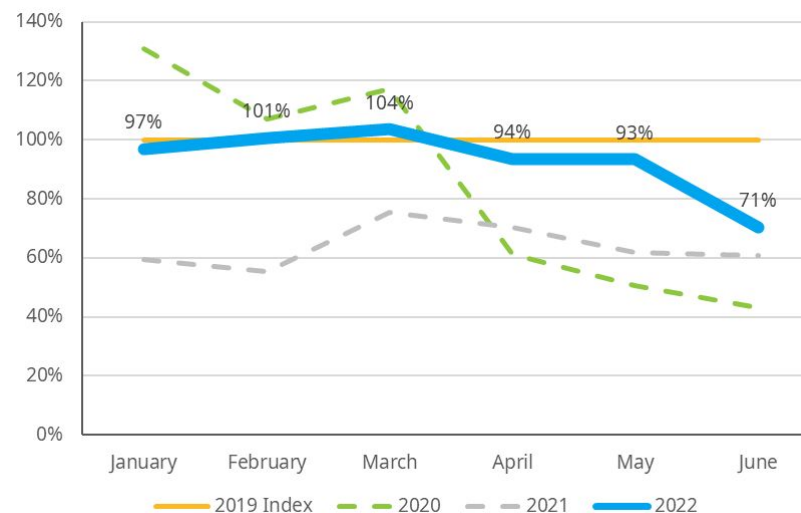
Monthly **lead room nights** through June 2022

Percentage of 2019 index



Monthly **lead attendance** through June 2022

Percentage of 2019 Index



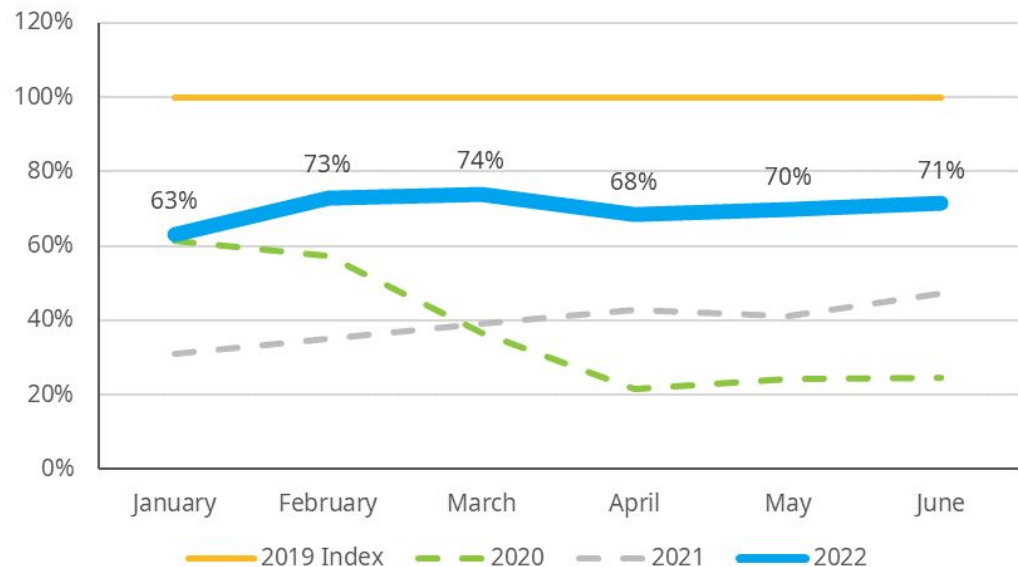
Bookings still have a way to go to catch up to 2019

While the total number of leads in 2022 is close to 2019, the January to June 2022 **total number of bookings averages 70% of the 2019 index.**

However, comparing 2022 number of bookings to 2021, bookings are up 77%.

Monthly number of bookings through June 2022

Percentage of 2019 index





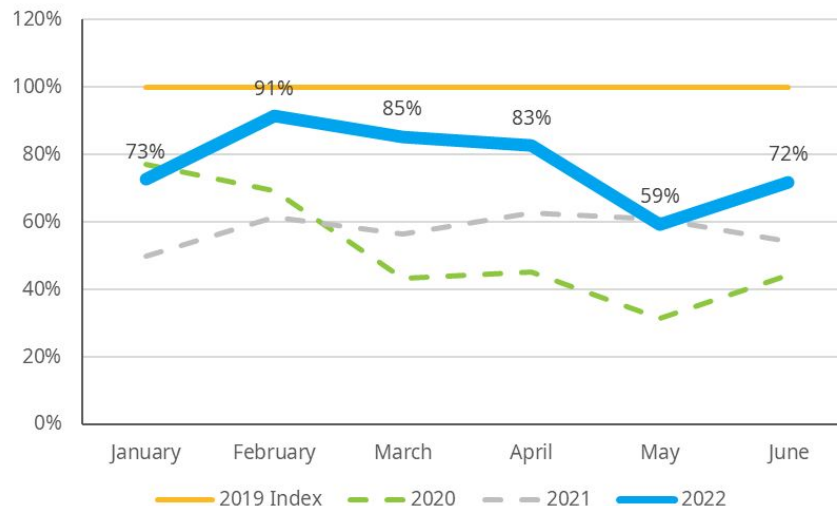
Here's what we're seeing ...

Booked room nights from January to June 2022 have been above 70% of 2019 index each month, except May 2022. Total booked attendance from January to June 2022 is down 29% compared to 2019.

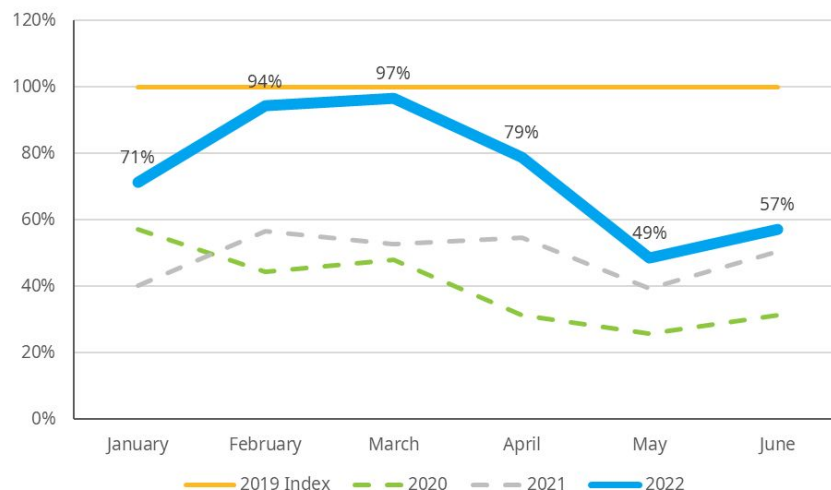
Booked room nights are 33% higher through June 2022 than through June 2021. Overall, definite attendance through June 2022 is down 29% from 2019 but up 47% over 2021.

Attendance can vary widely due to booking practices and large attendee events.

Monthly **booked room nights** through June 2022
Percentage of 2019 index



Monthly **booked attendance** through June 2022
Percentage of 2019 index





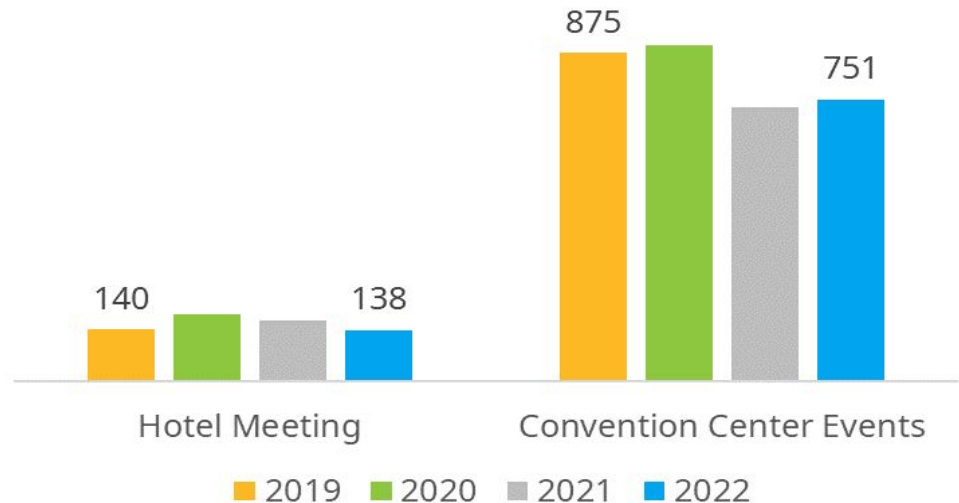
Here's what we're seeing ...

The average peak rooms for booked convention center events has dropped 14% through June 2022 compared to 2019.

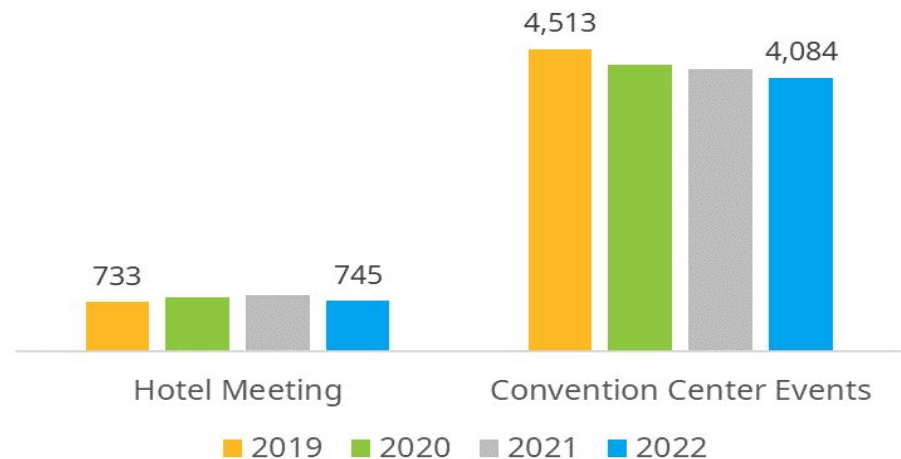
Average attendance for booked convention center events through June 2022 is down 9.5% compared to 2019.

The average peak rooms of booked hotel meetings stayed relatively the same.

Average booked peak rooms through June 2022



Average booked attendance through June 2022



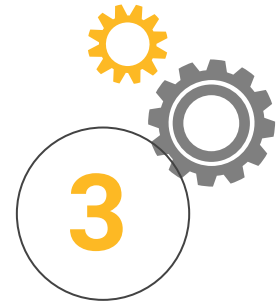
Pipeline health:



How does the **overall lead volume** compare to 2019? Are the leads trending larger or smaller?



How are **event cycles shifting**? How much of our lead volume is short term?



What **shifts are we seeing** in our key market segments? How has the pipeline changed compared to 2019?

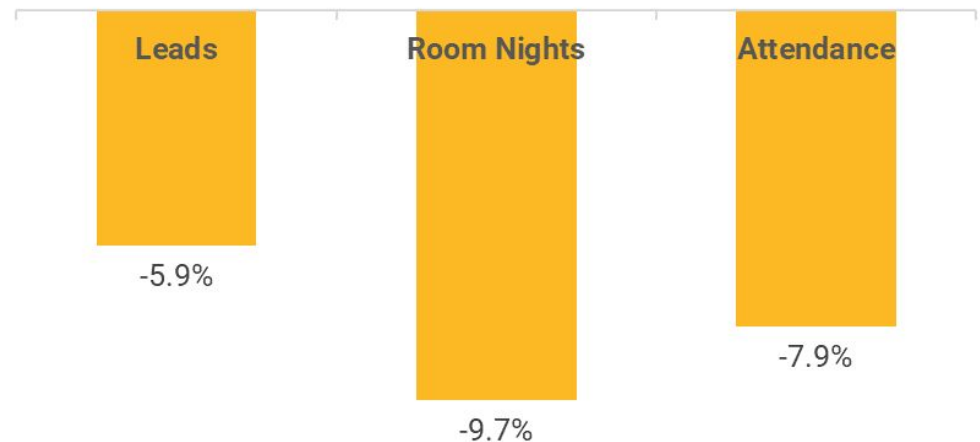
The “not so good” news about **lead volume** ...

What are the lead volume trends?

Through June 2022, the health of our lead pipeline for the aggregate of DMOs **still lagged behind 2019 for all DMO measures** (number of leads, lead room nights, and lead attendance).

While progress has been made in recent months, for the first half of 2022, there were 5.9% fewer leads, 9.7% fewer room nights, and 7.9% less attendance compared to 2019.

Lead pipeline through June 2022 compared to 2019

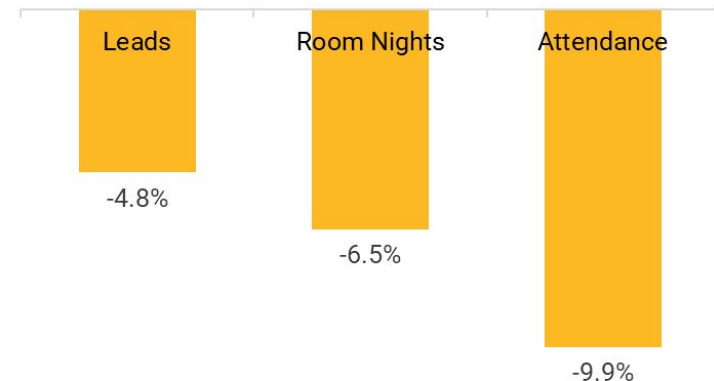


The numbers reveal ...

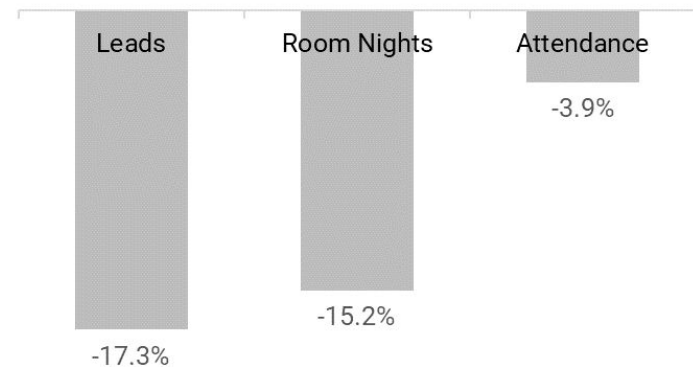
Hotel meeting percentage variances through June 2022 have performed relatively consistent to the aggregate of DMO leads compared to 2019, except for attendance. The -9.9% lead attendance variance from 2019 can be partly explained by the number of mega-events in the pipeline for 2019. There were over 80 hotel meetings with 75,000 attendees or greater in 2019, compared to 43 events of that size in 2022.

2022 **convention center** leads and room nights for future years are significantly behind 2019, with most lead variances occurring two to five years out. You'll find a further exploration of these variances in the Event Cycle and Sales Cycle sections.

Hotel meeting leads, room nights, and attendance through June 2022 compared to 2019



Convention center leads, room nights, and attendance through June 2022 compared to 2019

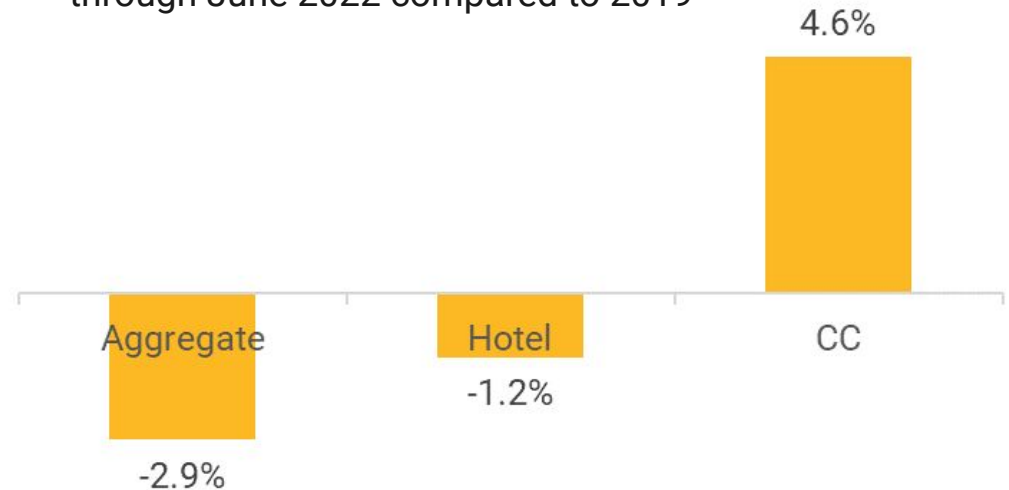


Here's what we're seeing ...

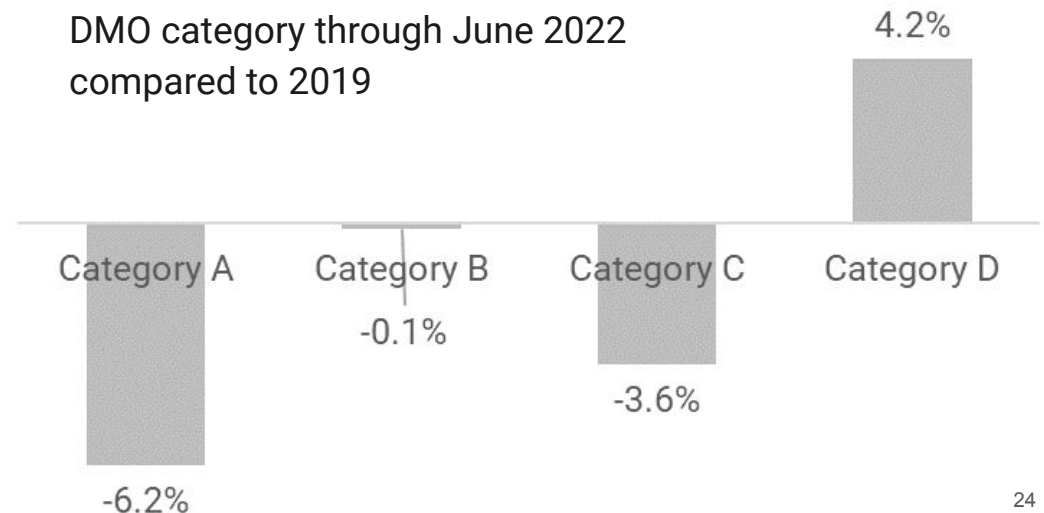
Overall, the average peak room of leads in the pipeline has not changed significantly from 2019, although the average peak room has impacted Category A DMOs more than Category D DMOs.

A 2.9% decrease results in 41 room nights per lead, so when multiplied by the 68,000 leads that DMOs generated in aggregate, the total room night impact exceeded 2.8 million.

Average lead peak rooms in the pipeline through June 2022 compared to 2019



Average lead peak rooms in the pipeline by DMO category through June 2022 compared to 2019



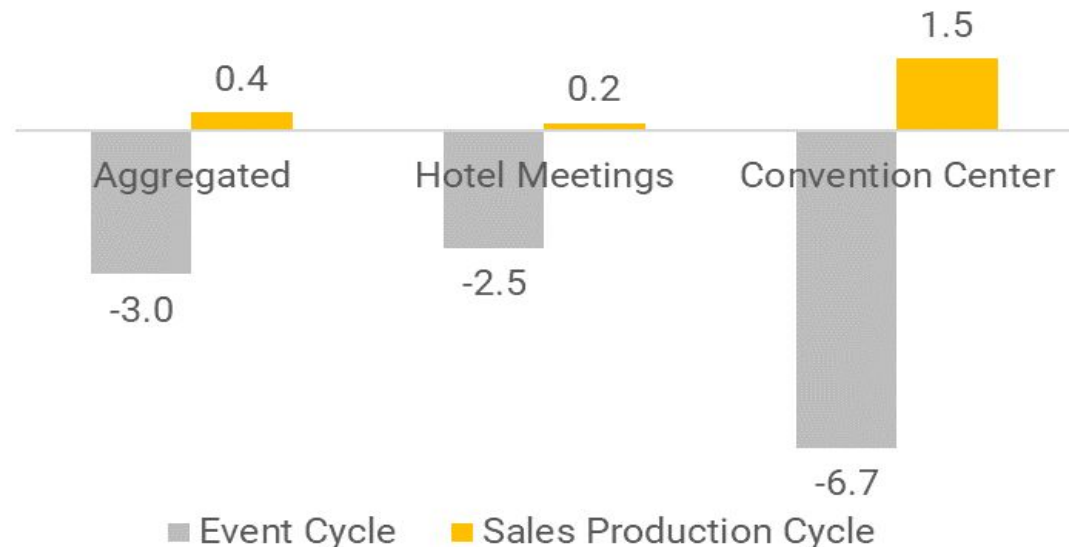
Event cycles become more short-term

What are we seeing?

We evaluated both the event cycle (lead create date to the meeting start date) and the sales production cycle (lead create date to date definite) to understand if there have been any significant changes since 2019.

The 2022 event cycle has become shorter on average by three months compared to 2019. On the other hand, the sales production cycle, especially for convention center leads, has become slightly longer. **Planners are sourcing closer to the event while also taking a little longer to confirm the business definite.**

Net **number of months** leads are in the event & sales production cycles through June 2022 compared to 2019



A deeper look ...

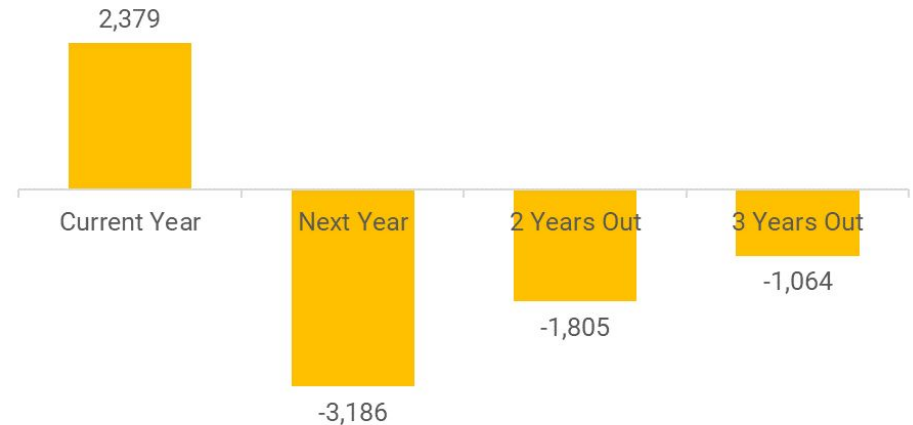
Another way to evaluate the event cycle is to break down the number of leads in the pipeline by the leads' arrival period (i.e., arriving in the current year, next year, two years out, etc.).

Underscoring the shorter event cycles for hotel meeting leads, over 2,300 more hotel meeting leads are in the pipeline for the remainder of 2022 versus same-period 2019.

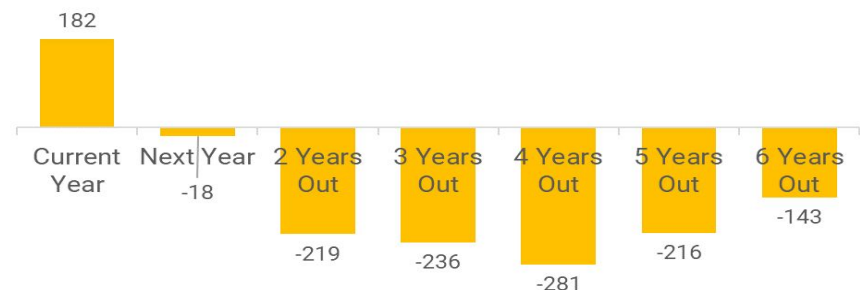
As we look further out, we note some negative lead variances in our pipeline for hotel meetings and convention center events.

Whether these shorter cycles will continue and present a reset for our event cycles remains a question.

Net number of hotel meeting leads in the pipeline compared through June 2022 compared to 2019



Net number of convention center leads in the pipeline through June 2022 compared to 2019



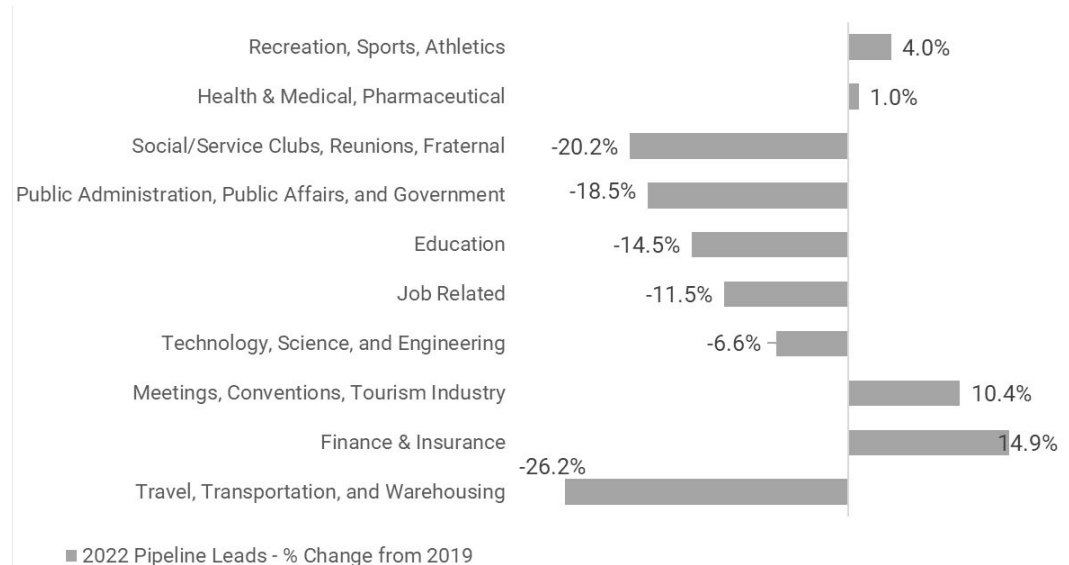
Key market segments see some significant shifts

What does this **mean for you?**

We analyzed the 2019 booked hotel meetings and convention center events to understand the most important market segments. The top 10 market segments for **hotel meeting leads** include Recreation, Sports, Athletics ranked as #1, Health & Medical, Pharmaceutical as #2, and Social/Service Club, Reunions, Fraternal as #3.

The percentage variance indicates which market segments have more or fewer leads in the 2022 pipeline compared to the 2019 pipeline and illustrates the need to focus on certain segments.

Top 10 market segments: **number of hotel meeting leads** percentage variance through June 2022 compared to 2019

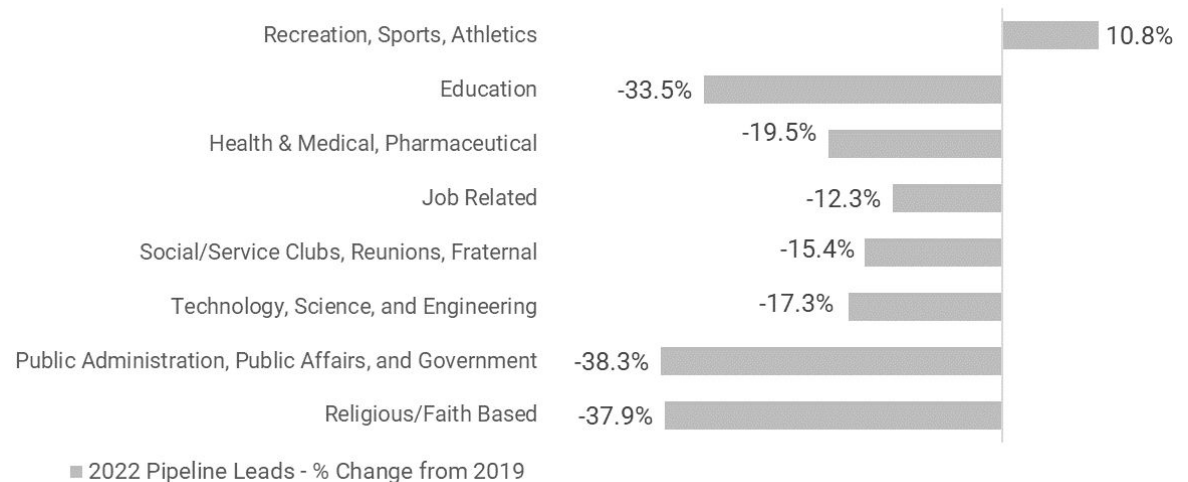


Here's what **we're seeing** ...

For convention center events, the top eight market segments include Recreation, Sports, Athletics as #1, Education as #2, and Health & Medical, Pharmaceutical as #3.

Across all top convention center market segments, DMOs have fewer leads in the 2022 pipeline than in 2019, except for Recreation, Sports, Athletics, where there is an 10.8% increase through June 2022.

Top 8 market segments: **number of convention center event leads** percentage variance comparing 2022 to 2019, through June





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DMO Categories

DMO **categories**

To further understand progress and pipeline trends, the industry aggregate of 215 DMOs were segmented by four categories. Each category is defined by the presence and size of the destinations' convention center exhibit space as follows:

CATEGORY A — DMOs without a major convention facility
(81 destinations)

CATEGORY B — DMOs with a convention center exhibit space of less than 100,000 gross square feet (72 destinations)

CATEGORY C — DMOs with a convention center exhibit space between 100,000-499,999 gross square feet (47 destinations)

CATEGORY D — DMOs with a convention center exhibit space of 500,000 gross square feet or greater (15 destinations)

DMO category comparisons

Before analyzing each DMO category separately, we provide category comparisons for both hotel meetings and convention center events.

Category A DMOs was the only category that saw an increase in the number of hotel meeting leads in the pipeline, which helped to maintain room nights, despite the 6.2% decrease in peak room size compared to 2019.

Number of hotel meeting leads by DMO category through June 2022 compared to 2019



Hotel meeting lead room nights through June 2022 compared to 2019



(continued from previous slide)

Conversely, the fewer hotel meeting leads of Category D DMOs resulted in fewer room nights compared to 2019.

Category B and C DMOs were able to increase room nights in the pipeline despite fewer leads because of an increase in the average peak room over 2019 leads.

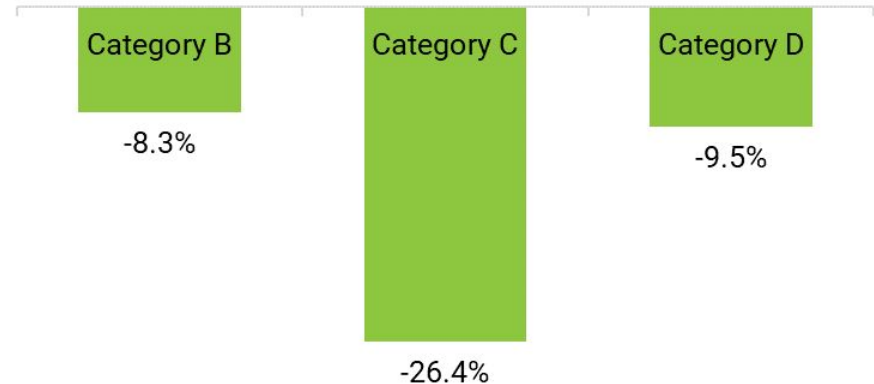
Hotel meeting leads average lead peak rooms by DMO category through June 2022 compared to 2019



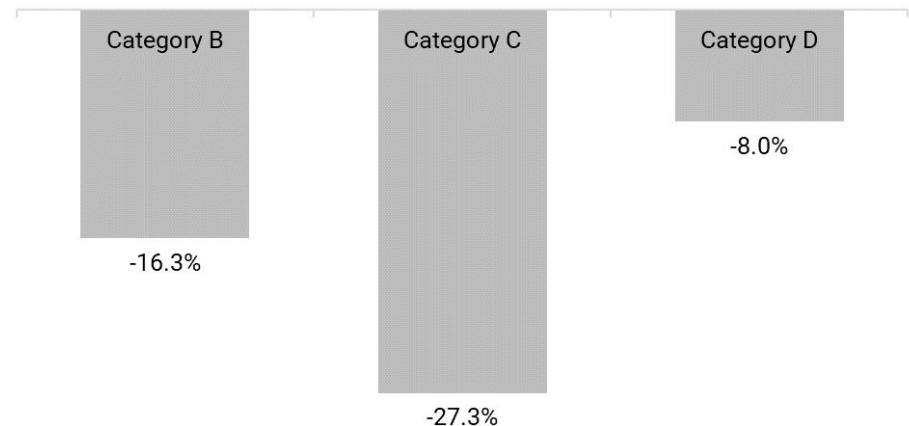
For 2022 **convention center event leads**, DMOs in Category B have fewer room nights (-16.3%), which has been impacted by fewer leads (-8.3%) in the pipeline compared to 2019 and also a decrease in the leads' average peak room (-7.5%) compared to 2019.

For Category C DMOs, despite the slight increase in the average convention center lead size (2.3%), room nights in the pipeline are down (-27.3%) compared to 2019. This is largely a function of -26.4% fewer leads and perhaps a reluctance on the part of event organizers to begin sourcing for future years.

Number of convention center event leads by DMO category through June 2022 compared to 2019



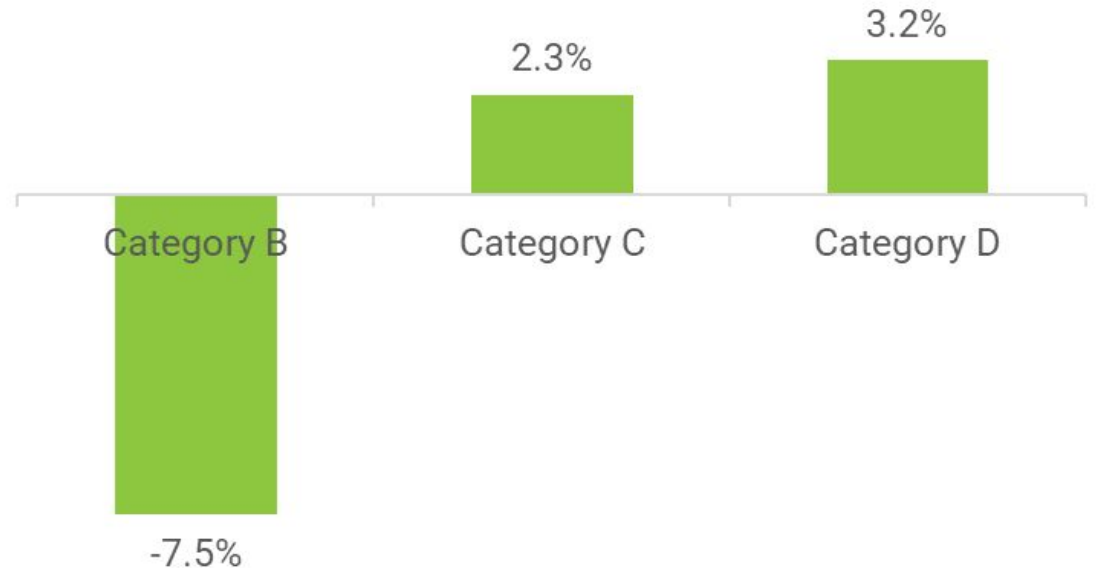
Convention center event lead room nights by DMO category through June 2022 compared to 2019



(continued from previous page)

Convention center event leads average peak rooms for Category D DMOs increased by 3.2%, which helped keep convention center room nights to a -8.0% decrease and the number of leads in the pipeline to a -9.5% decrease compared to 2019.

Convention center event leads average peak rooms by DMO category through June 2022 compared to 2019



Category A DMOs

Progress and pipeline health

Category A – DMOs without a major convention facility
(81 destinations)

Category A: number of leads

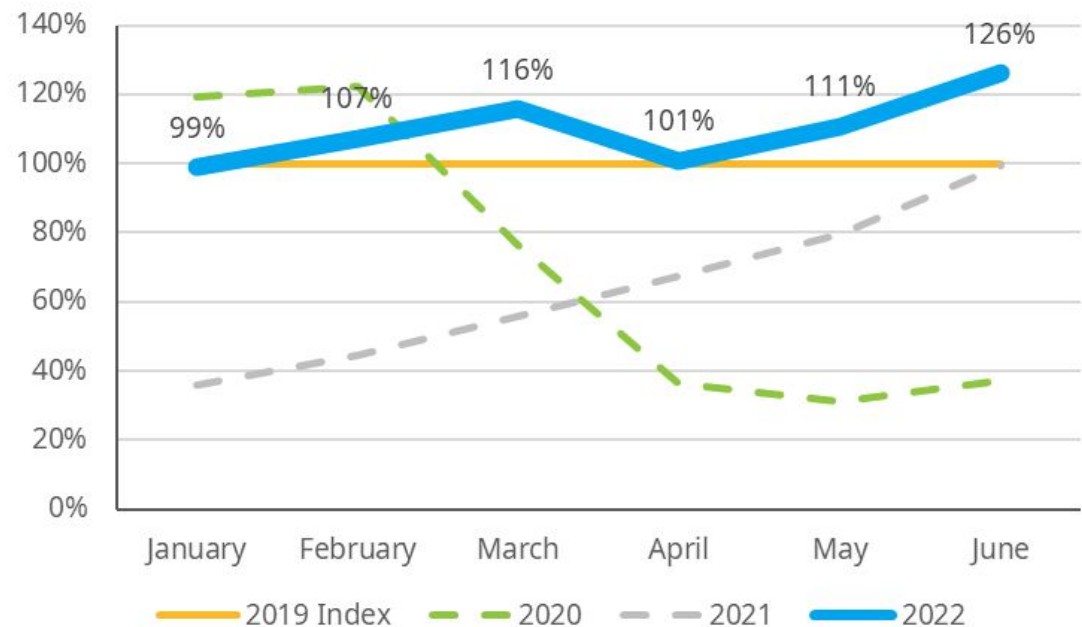
What are we seeing?

Progress for the number of leads for Category A DMOs is above 2019 levels by over 9%. Leads are down 6.7% in the second quarter of 2022 compared to Q1.

Category A — DMOs without a major convention facility (81 destinations)

Monthly number of hotel meeting leads through June 2022

Percentage of 2019 index

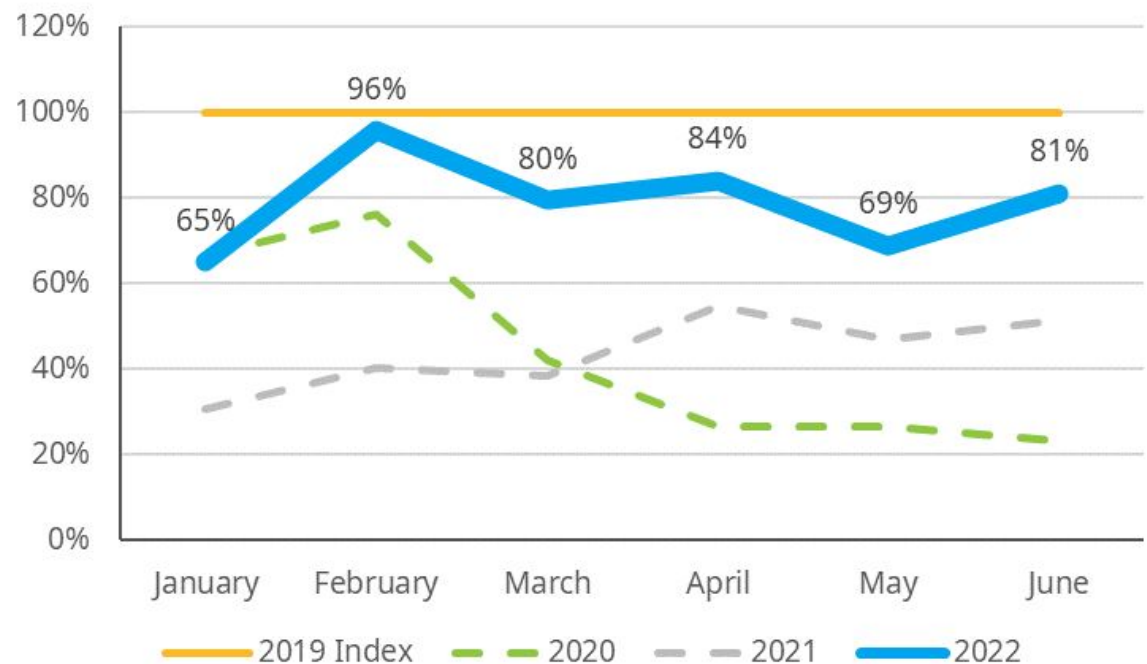


Category A: number of booked events

We're seeing ...

The number of booked hotel meetings from April to June 2022 is down 2% compared to the stronger start of January to March 2022.

Monthly number of booked hotel meetings through June 2022
Percentage of 2019 index





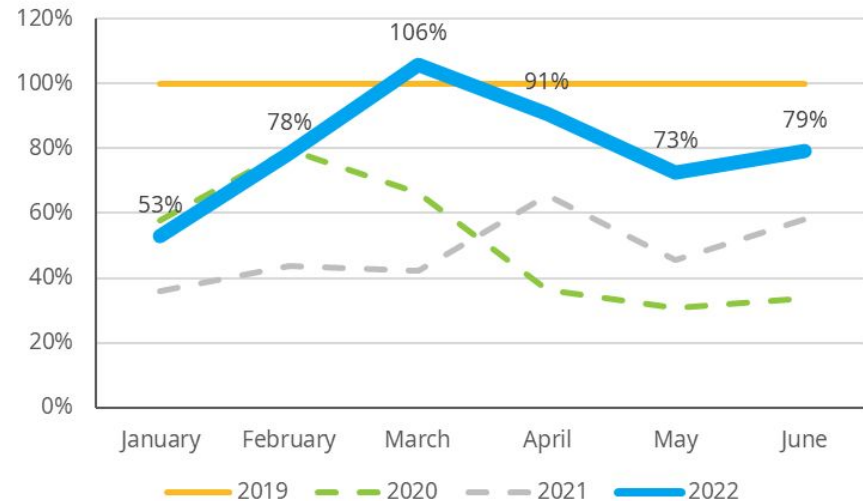
Category A: booked room nights & attendance

Through June 2022, booked hotel meeting room nights are **down 21% from 2019 but are up 67%** compared with 2021.

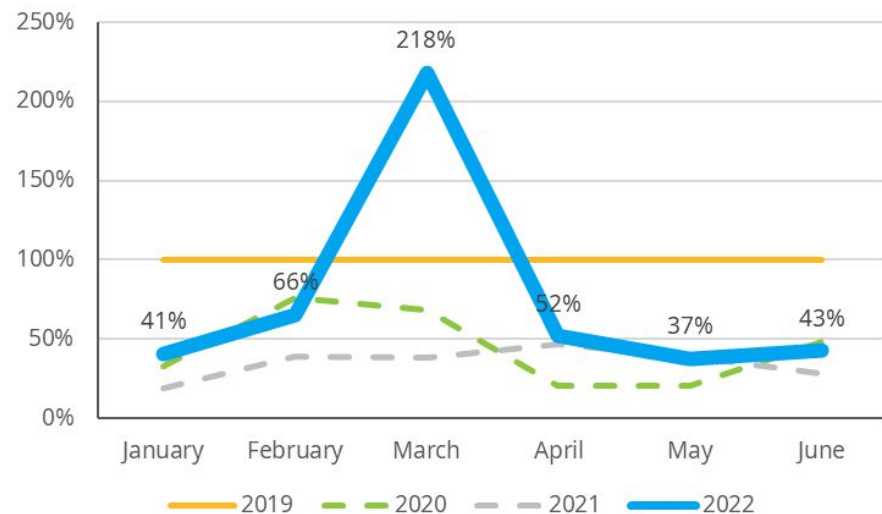
Even with the significant March 2022 spike, total attendance for 2022 through June is down 30% compared to 2019.

Note — the spike in March 2022 is from a few large sporting events with high attendance that turned definite in that month.

Monthly booked hotel meeting room nights through June 2022 Percentage of 2019 index



Monthly booked hotel meeting attendance through June 2022 Percentage of 2019 index



Category A: lead volume & event cycle

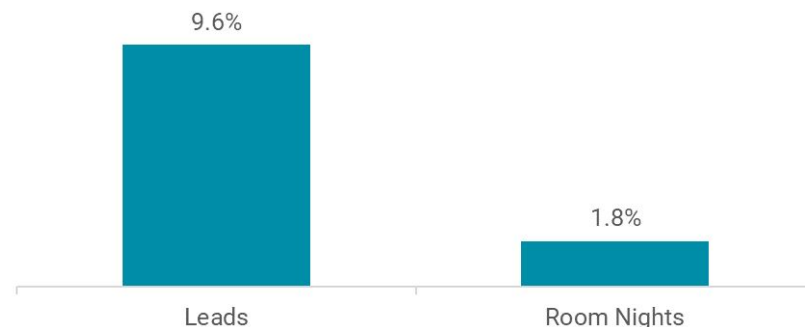
What are we seeing?

The number of hotel meeting leads in the pipeline through June 2022 have increased by 9.6% and 1.8% in lead room nights over 2019.

Contributing to the smaller room nights is the decrease in average size lead (peak room) by 6%. The average lead for 2019 was 126 rooms on peak. In 2022, that dropped to 118 rooms on peak.

Lead volume in the pipeline has also become very short-term, with 924 more leads arriving in the remaining half of 2022 compared to 2019.

Number of hotel meeting leads and room nights through June 2022 compared to 2019



Net number of hotel meeting leads in the pipeline through June 2022 compared to 2019



Category B DMOs

Progress and pipeline health

Category B – DMOs with a convention center exhibit space of less than 100,000 gross square feet (72 destinations)



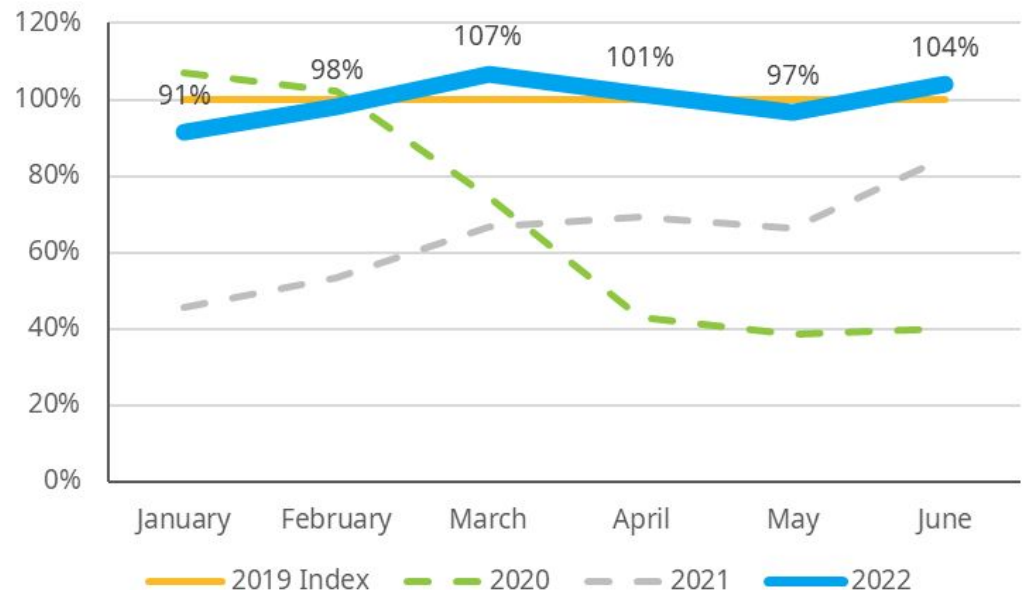
Category B: number of leads

The number of leads (hotel and convention center) progress in the second quarter of 2022 was 6.2% behind the first quarter.

Category B - DMO's with a convention center exhibit space of less than 100,000 gross square feet (72 destinations)

Monthly number of leads through June 2022

Percentage of 2019 index



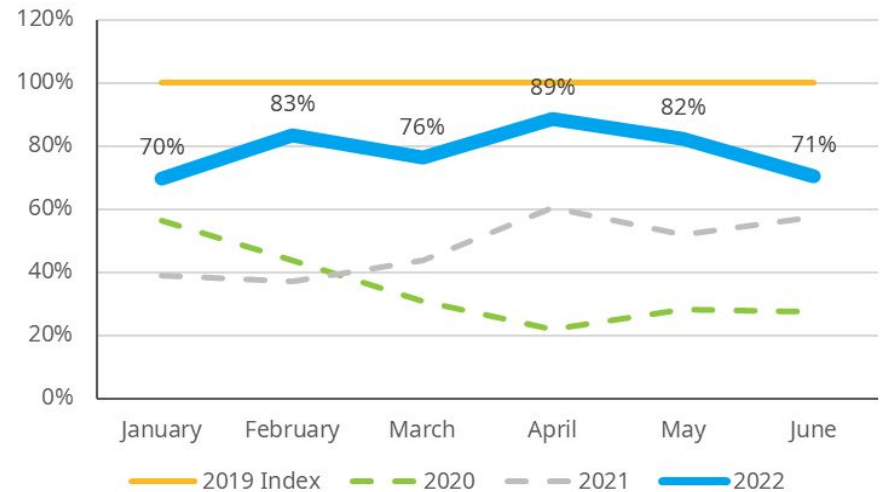


Category B: number of booked events

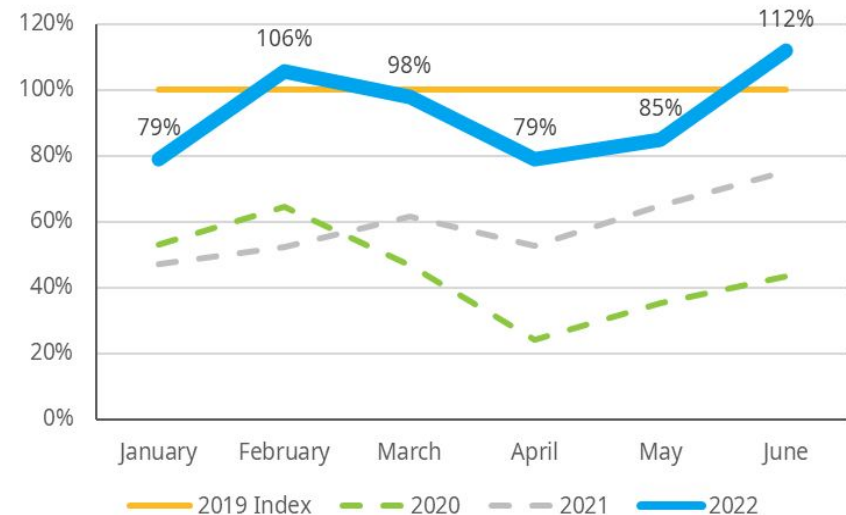
The number of booked hotel meetings in 2022 through June is down 23% from 2019. Additionally, the second quarter of 2022 is down 6% over the first quarter, with June showing only 71% of 2019 levels.

The number of booked convention center events is down 8% through June 2022 compared to 2019, although June 2022 shows the strongest month thus far.

Monthly number of booked hotel meetings through June 2022
Percentage of 2019 index



Monthly number of booked convention center events through June 2022
Percentage of 2019 index





Category B: booked hotel meeting room nights & attendance

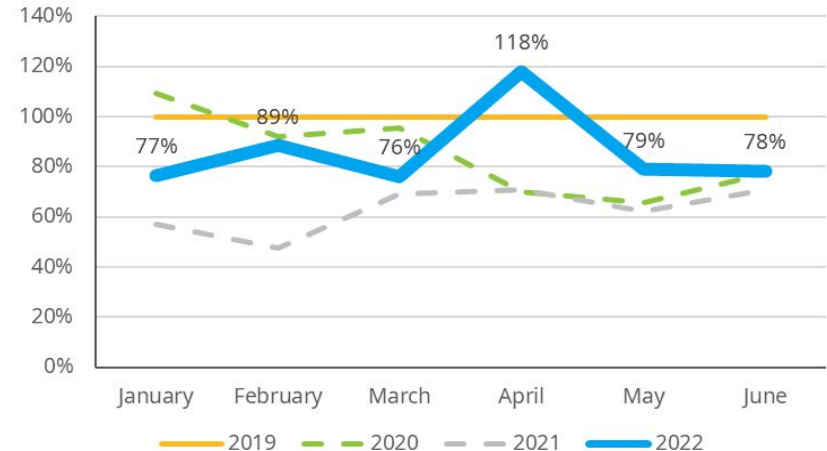
What are we seeing?

Booked hotel meeting room nights and attendance have been volatile in 2022 thus far. Room nights saw a high in April 2022 of 118% compared to 2019 versus a low in attendance in June 2022 of 53%.

In booked hotel meeting room nights, the second quarter of 2022 **was 2% higher than Q1**. Booked hotel meeting attendance through 2022 is **down 21% from 2019**.

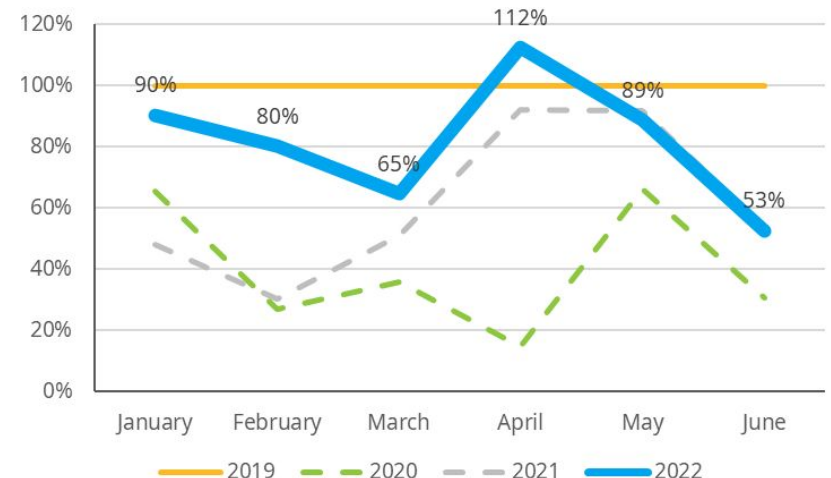
Monthly booked hotel meetings room nights through June 2022

Percentage of 2019 index



Monthly booked hotel meetings attendance through June 2022

Percentage of 2019 index





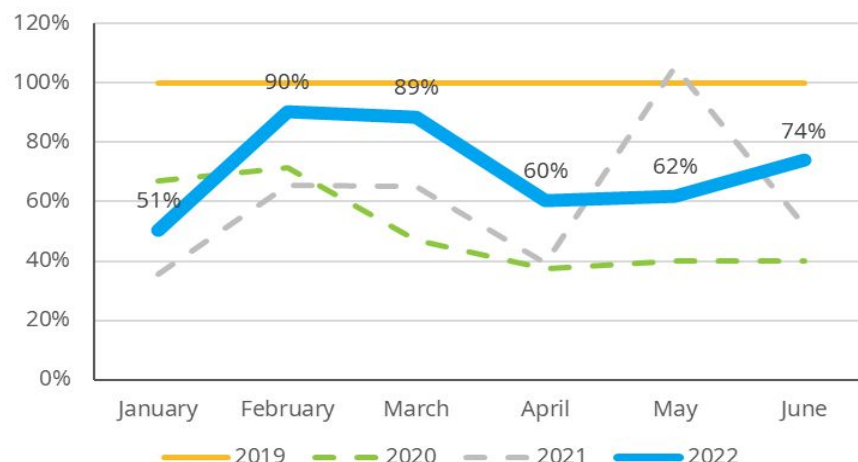
Category B: booked convention center event room nights & attendance

What does this **mean for you?**

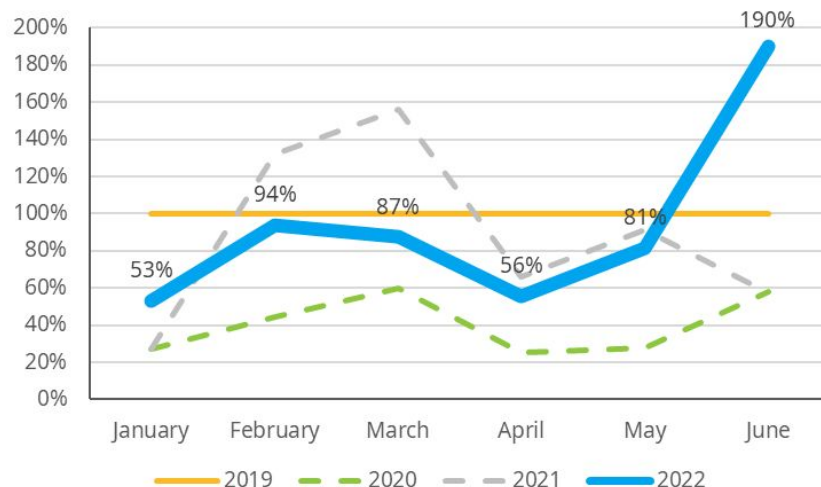
Convention center event room nights are down 31% compared to 2019 and up 20% from 2021 levels. Booked convention center event **attendance is up 32% in the second quarter** compared to Q1.

Category B destinations have convention center exhibit space of less than 100k, with a much higher proportion of hotel meetings compared to convention center events. **Therefore, convention center events tend to be more volatile when larger events book in a given month.**

Monthly booked convention center events room nights
through June 2022
Percentage of 2019 index



Monthly booked convention center events attendance
through June 2022
Percentage of 2019 index



Category B: lead volume & room nights

Through June 2022 compared to 2019 ...

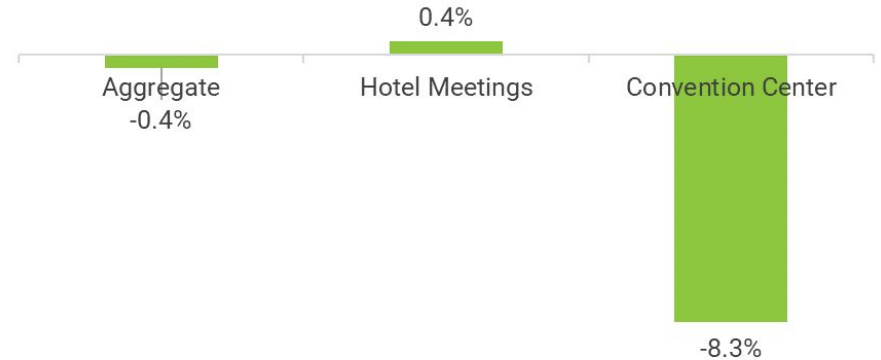
Aggregated leads in the pipeline have remained relatively flat, but convention center leads are behind by 8.3%.

The greatest variance is in convention center leads and room nights, yet since the proportion of convention center leads is fewer than 10%, the overall aggregate remained unchanged.

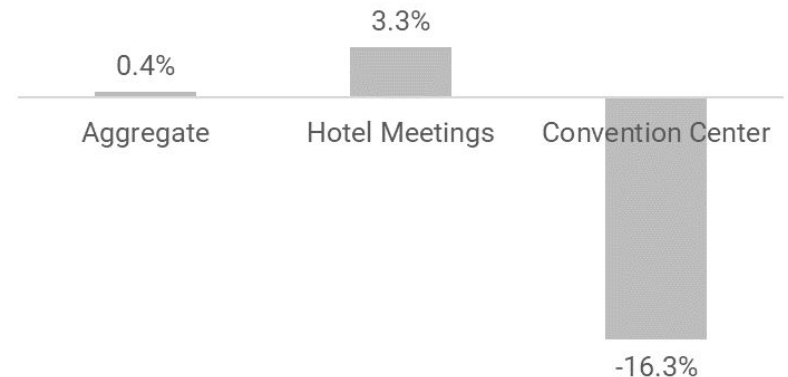
The average hotel meetings peak room **increased by nearly 2%**, resulting in slightly higher room nights over 2019.

For convention center leads in the pipeline, the average peak room **decreased by 7.5%**, resulting in a greater variance over 2019.

Number of leads through June 2022 compared to 2019



Number of room nights through June 2022 compared to 2019



The numbers reveal ...

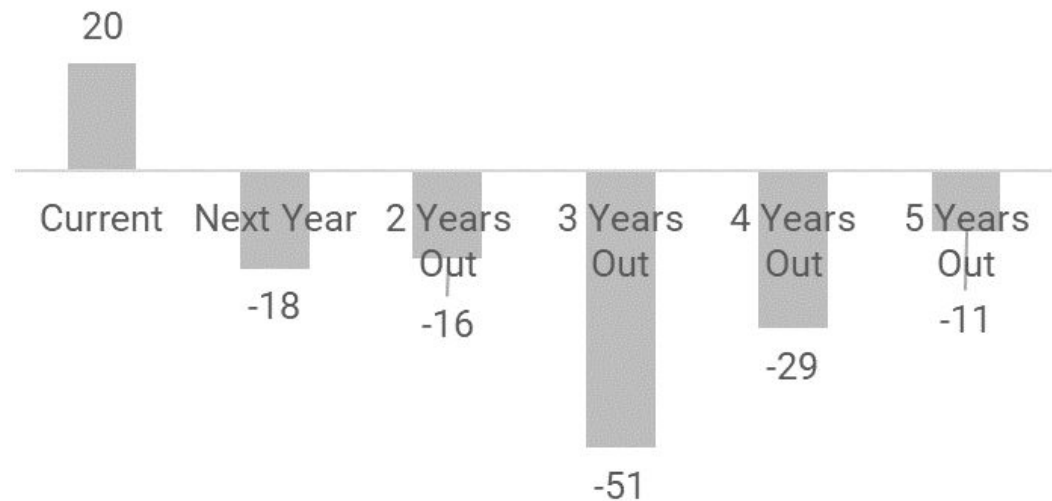
The event cycle has shifted shorter term, with 425 more hotel meeting leads and 20 more convention center leads in the pipeline for the remaining half of 2022 compared to 2019.

We'll monitor this trend to see if next-year variances will be covered by continued short-term activity.

Net **number of hotel meeting leads** in the pipeline through June 2022 compared to 2019



Net **number of convention center leads** in the pipeline through June 2022 compared to 2019



Category C DMOs

Progress and pipeline health

Category C – DMOs with a convention center exhibit space between 100,000 - 499,999 gross square feet (47 destinations)

Category C: number of leads

Today's takeaways ...

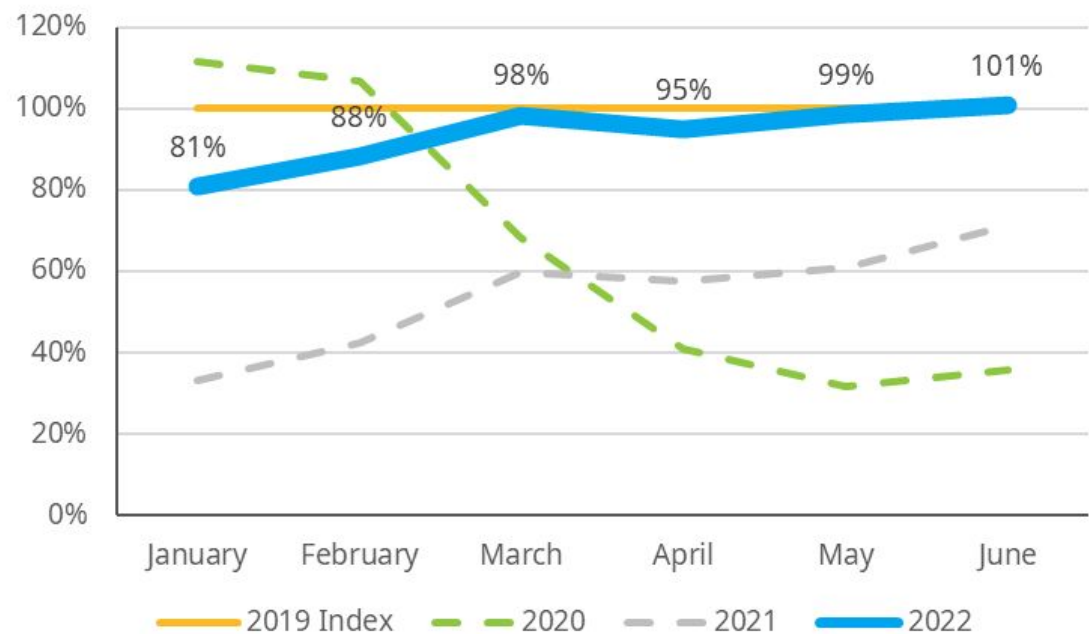
Meeting leads (hotel and convention center) are down 7% through June 2022 from 2019. They're up 2% in Q2 compared to Q1 of 2022.

Compared with all destinations, Category C is farther behind 2019 levels through June 2022.

Category C – DMOs with a convention center exhibit space between 100,000 - 499,999 gross square feet (47 destinations)

Number of leads through June 2022

Percentage of 2019 index





Category C: number of booked events

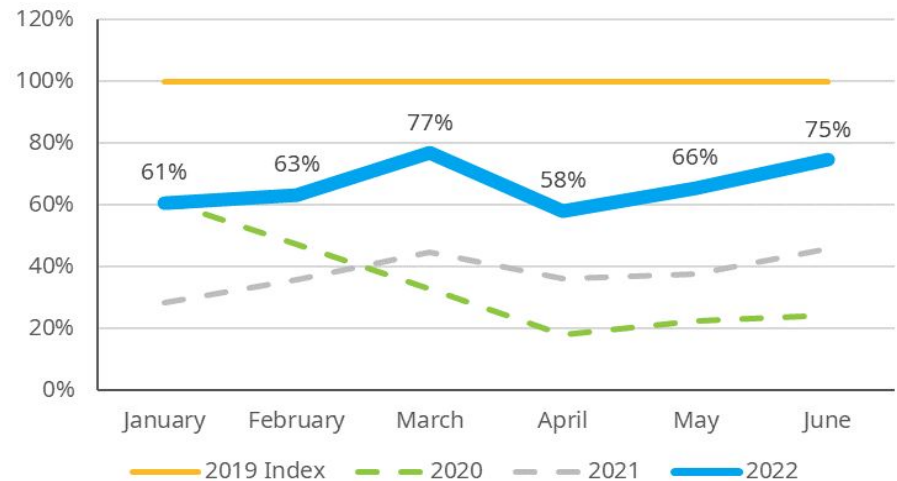
What do the numbers tell us?

While the number of booked convention center events is down significantly in the second quarter of 2022, the average number of booked events over the first six months is down 30%.

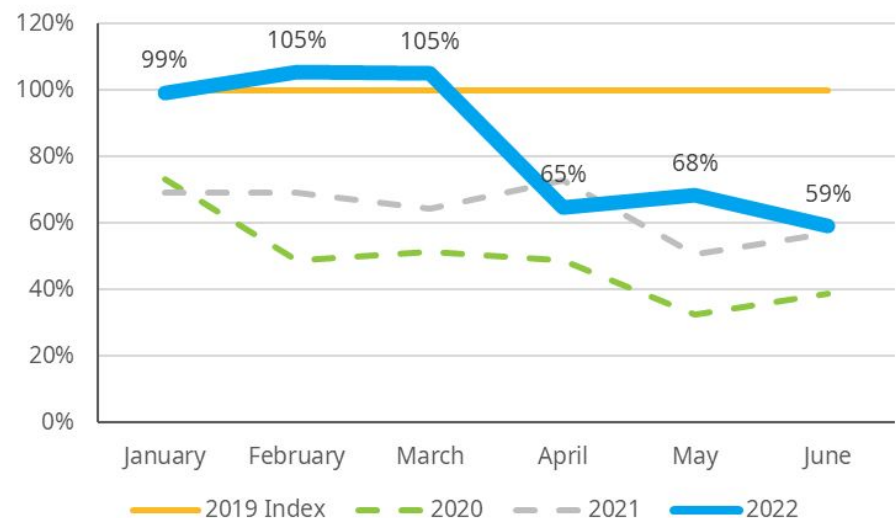
The number of booked hotel meetings is down 34% through June 2022 over the same period in 2019. The second quarter of 2022 is slightly ahead of the first by 3%.

In Q2 of 2022, the number of booked **convention center events are down 12% over the first quarter.**

Number of booked hotel meetings through June 2022
Percentage of 2019 index



Number of booked convention center events through June 2022
Percentage of 2019 index





Category C: booked hotel room nights & attendance

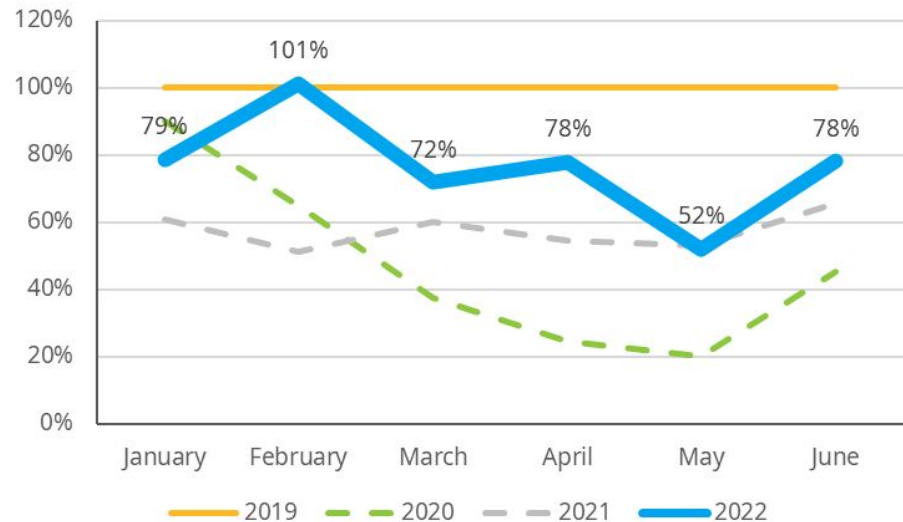
What are we seeing?

While booked hotel meeting room nights are down 25% through June 2022 compared to 2019, they're up 30% from 2021.

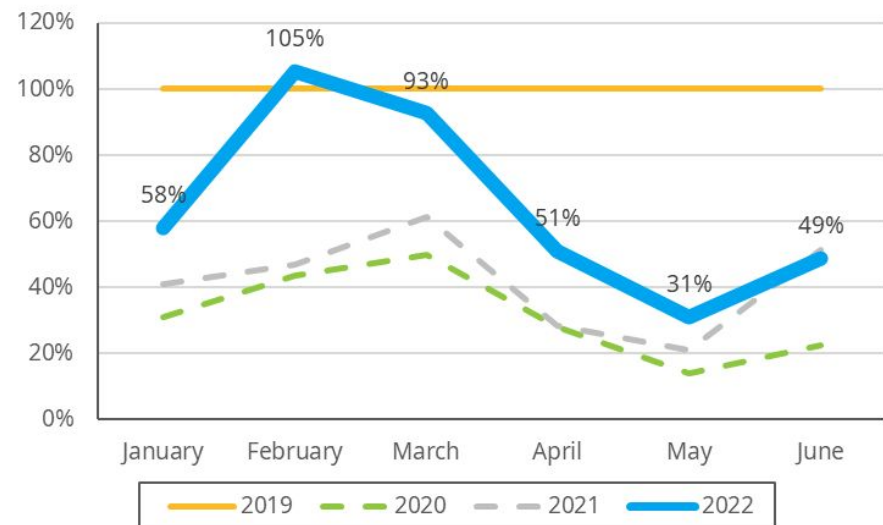
Booked hotel meeting attendance is down 41% through June 2022 from 2019 levels.

The -31% drop in May to June 2022 is due to an exceptionally strong bump in overall bookings in May to June 2019, which affected the 2022 variance.

Booked hotel meetings room nights through June 2022
Percentage of 2019 index



Booked hotel meetings attendance through June 2022
Percentage of 2019 index





Category C: booked convention center event room nights & attendance

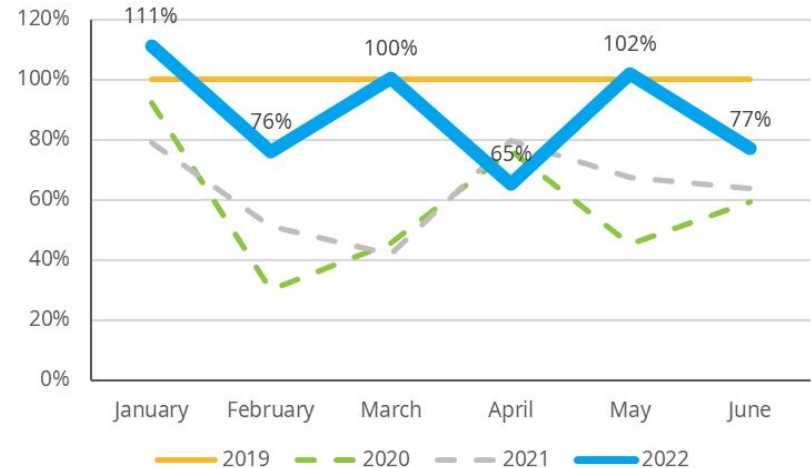
What are we seeing for Category C?

Booked convention center event room nights are down 13% through June 2022 compared to 2019 but faring much better when compared to the industry aggregate. The industry aggregate of booked convention center events is down 30%.

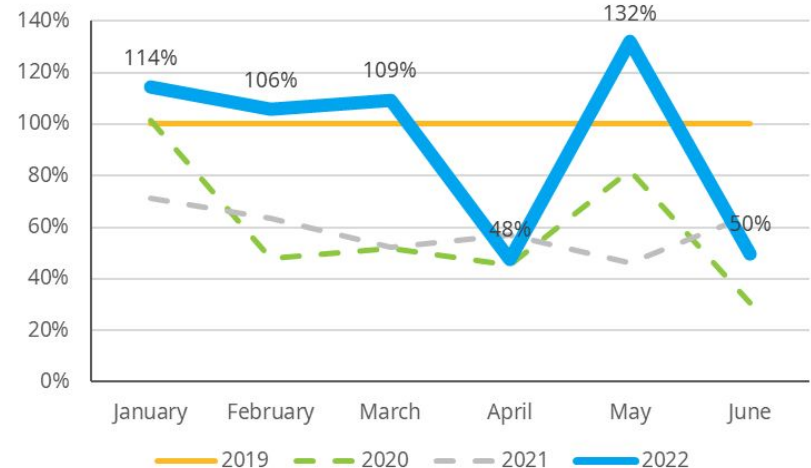
In the second quarter of 2022, **convention center event room nights are up 29%** compared to Q1.

Overall, **convention center event attendance is down 18% in 2022 through June compared to 2019**; April and June 2022 were down significantly.

Booked convention center event room nights through June 2022
Percentage of 2019 index



Booked convention center event attendance through June 2022
Percentage of 2019 index

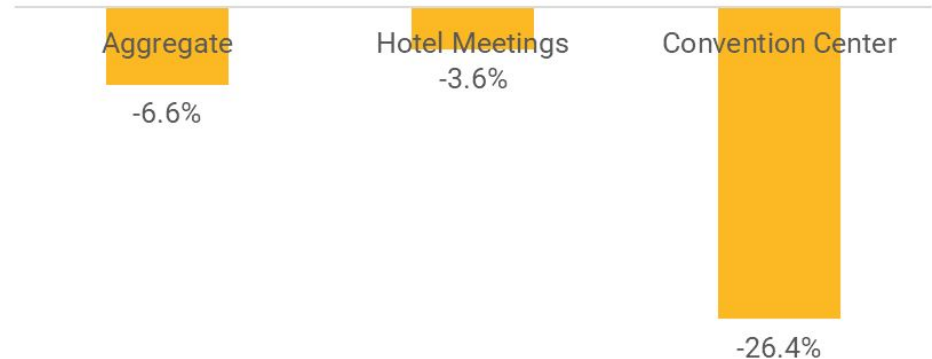


Category C: lead volume & room nights

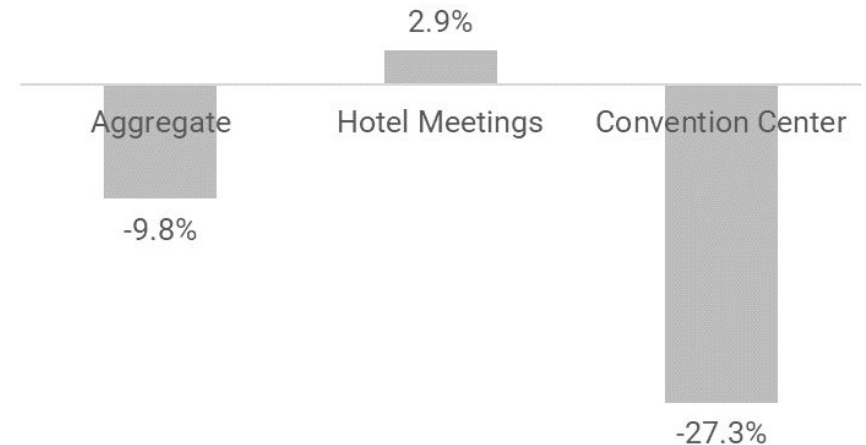
Through June 2022, leads in the DMO pipeline are down nearly 7% compared to 2019, a variance of over 1,500 leads. Even though hotel meetings leads are down 3.6% and convention center leads are down 26.4%, they share the 1,500 variance equally.

The **average peak room for hotel meetings increased by 3%** through June 2022, contributing to a rise in lead room nights to a **3% positive variance** over 2019.

Number of leads through June 2022 compared to 2019



Number of room nights through June 2022 compared to 2019



What does this **mean for you?**

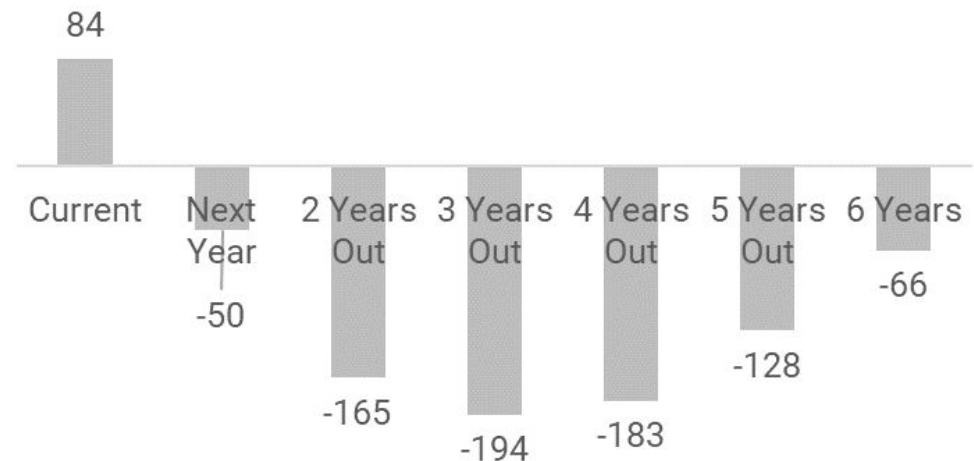
The event cycle has shifted shorter term, with **699 more hotel meeting leads** and **84 more convention center leads** in the pipeline for the remaining half of 2022 compared to 2019.

We'll continue to monitor this trend to see if next-year variances will be covered by this short-term activity.

Net **number of hotel meeting leads** in the pipeline through June 2022 compared to 2019



Net **number of convention center leads** in the pipeline through June 2022 compared to 2019



Category D DMOs

Progress and pipeline health

Category D — DMOs with a convention center exhibit space of 500,000 gross square feet or greater (15 destinations)

Category D: number of leads

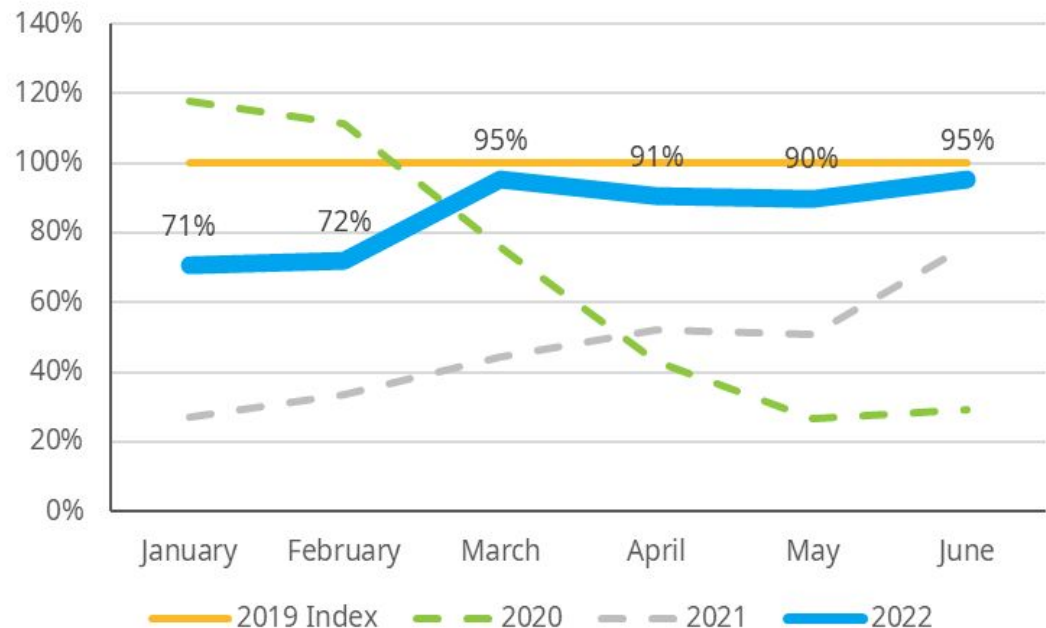
The number of leads (hotel and convention center) are down 14% through June 2022 compared to 2019.

However, Q2 of 2022 is up 15% over the first quarter.

Category D - DMO's with a convention center exhibit space of 500,000 gross square feet or greater (15 destinations)

Number of leads through June 2022

Percentage of 2019 index



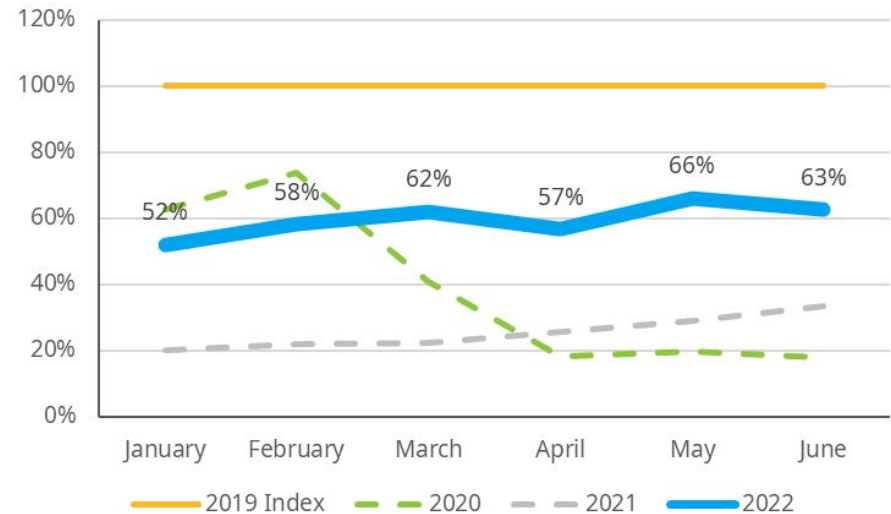


Category D: number of booked events

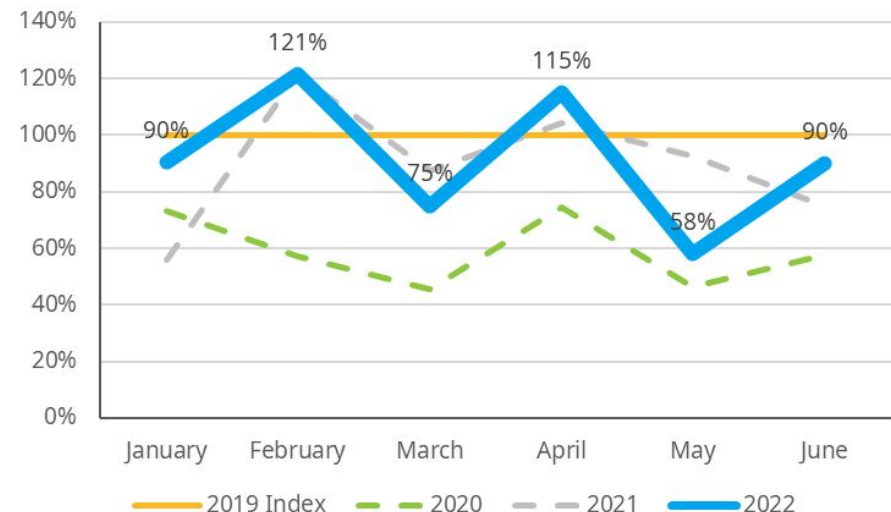
The number of booked hotel meetings is down 40% through June 2022 over 2019 levels, but it's up over 200% from 2021.

Booked convention center events are down 13% through June 2022 from 2019. However, the second quarter was up 16% over the first quarter of 2022.

Number of booked hotel meetings through June 2022
Percentage of 2019 index



Number of booked convention center events through June 2022
Percentage of 2019 index





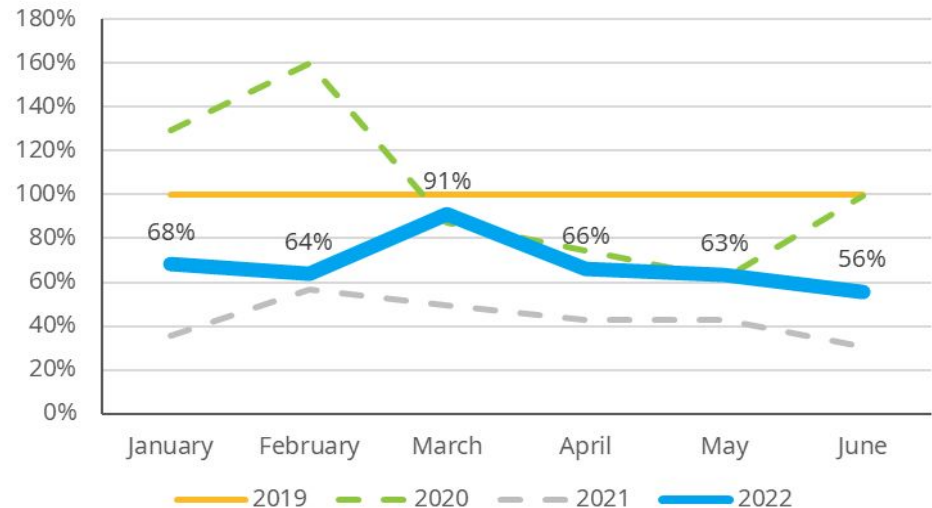
Category D: booked hotel meeting room nights & attendance

Booked hotel meeting room nights are down 32% in 2022 through June compared to 2019 and down by 12% in Q2 of 2022 compared to the first quarter.

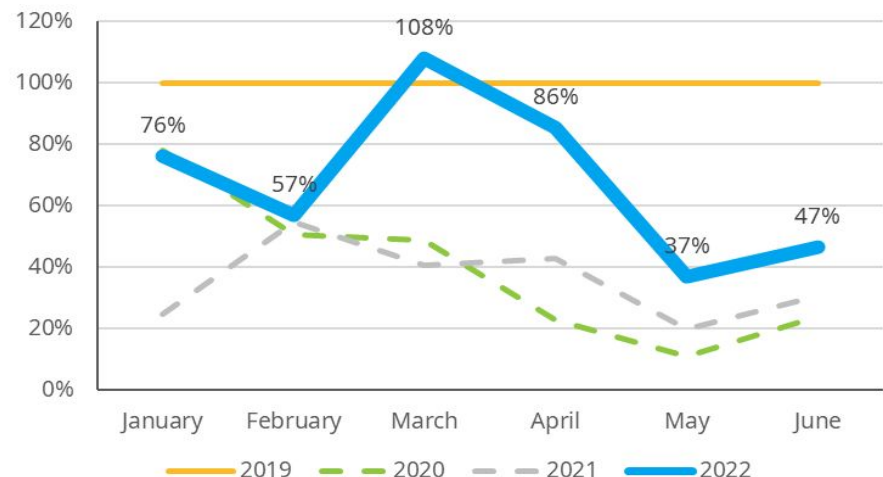
Booked hotel meeting attendance is down 35% through June 2022 compared to 2019.

While both room nights and attendance are down more than 30% for hotel bookings through June 2022, both did see significant improvement over 2021 levels – room nights are up 63%, and attendance is up 98% compared to 2021.

Booked hotel meeting room nights through June 2022
Percentage of 2019 index



Booked hotel meeting attendance through June 2022
Percentage of 2019 index



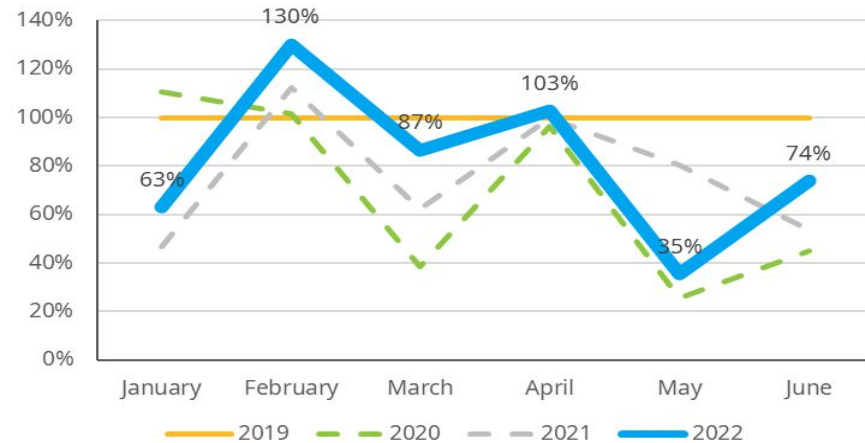


Category D: booked convention center events room nights & attendance

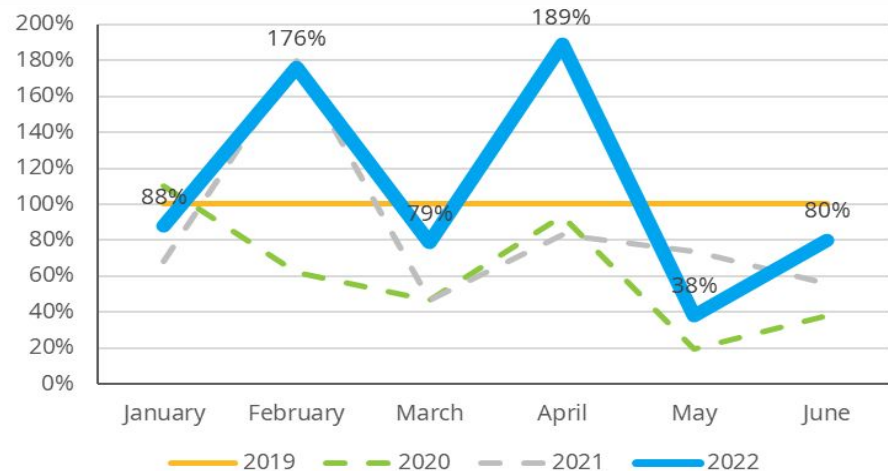
Booked convention center event room nights are down 25% from 2019 through June 2022, but they're up 8% in Q2 compared to Q1.

Booked convention center event attendance is down 15% through June 2022 compared to 2019, although February and April 2022 were particularly strong months.

Booked convention center event room nights through June 2022
Percentage of 2019 index



Booked convention center event attendance bookings through June 2022
Percentage of 2019 index



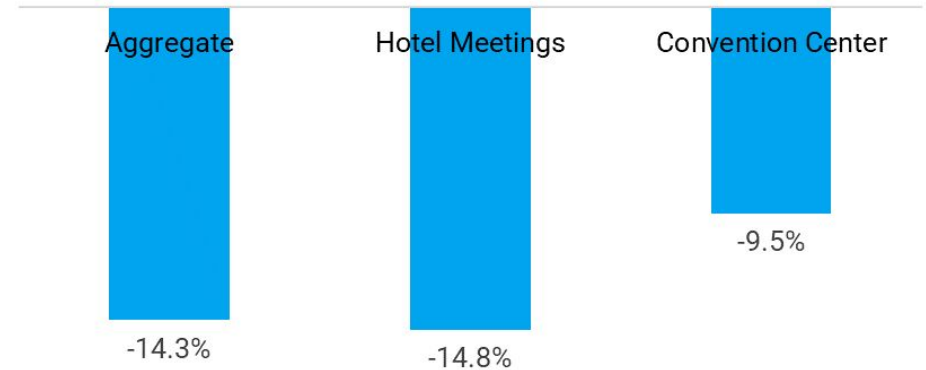
Category D: lead volume & room nights

What are we seeing?

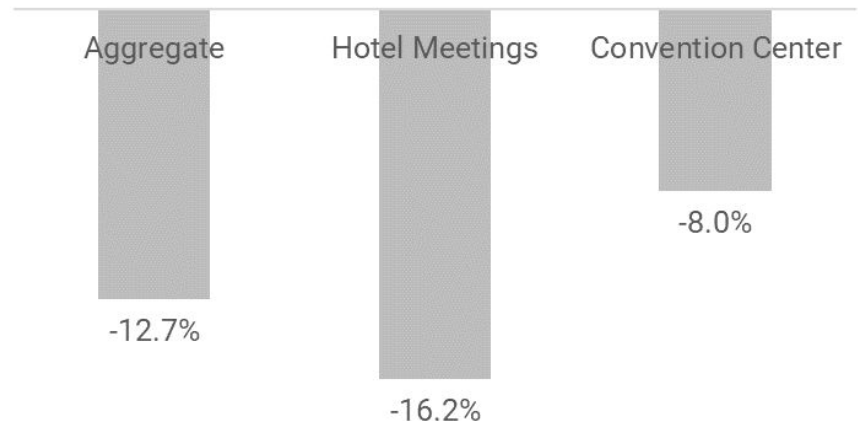
The number of leads in the DMO pipeline is down 14.3% compared to 2019. This amounts to a variance of over 3,600 leads. **The biggest contributor to this variance is hotel meetings leads, which are down by 14.8%.**

Convention center event leads are down nearly 10%, which amounts to just under 200 leads.

Number of leads through June 2022 compared to 2019



Number of room nights through June 2022 compared to 2019

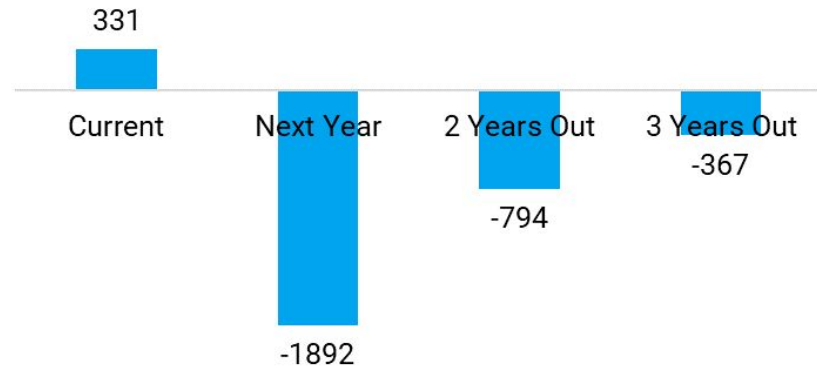


What does this **mean for you?**

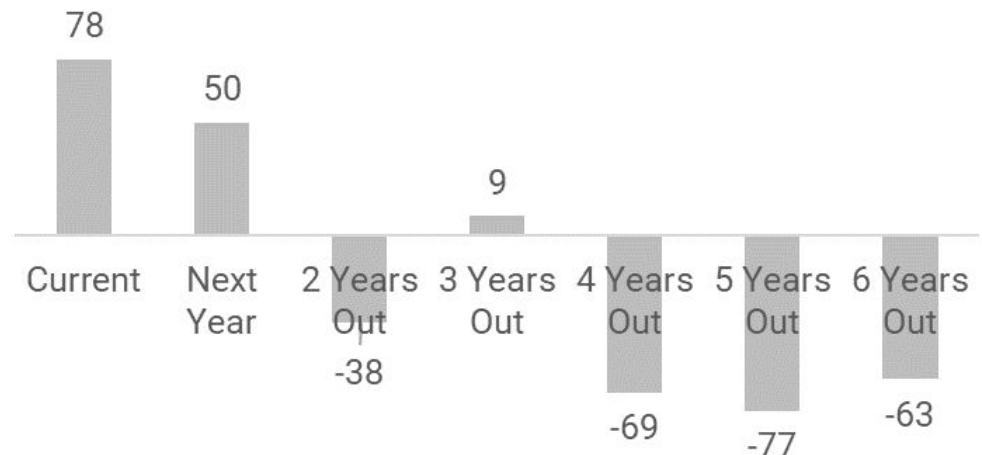
The event cycle has shifted shorter term, with 331 more hotel meeting leads and 78 more convention center event leads in the pipeline for the remaining half of 2022 compared to 2019.

We will continue to monitor this trend to see if next-year variances will be covered by this short-term activity.

Net **number of hotel meeting leads** in the pipeline through June 2022 compared to 2019



Net **number of convention center leads** in the pipeline through June 2022 compared to 2019





2 synergize

A Simpleview Consulting Company

SIMPLEVIEW SALES QUARTERLY | JULY 2022

Regions

Canada (9 destinations)

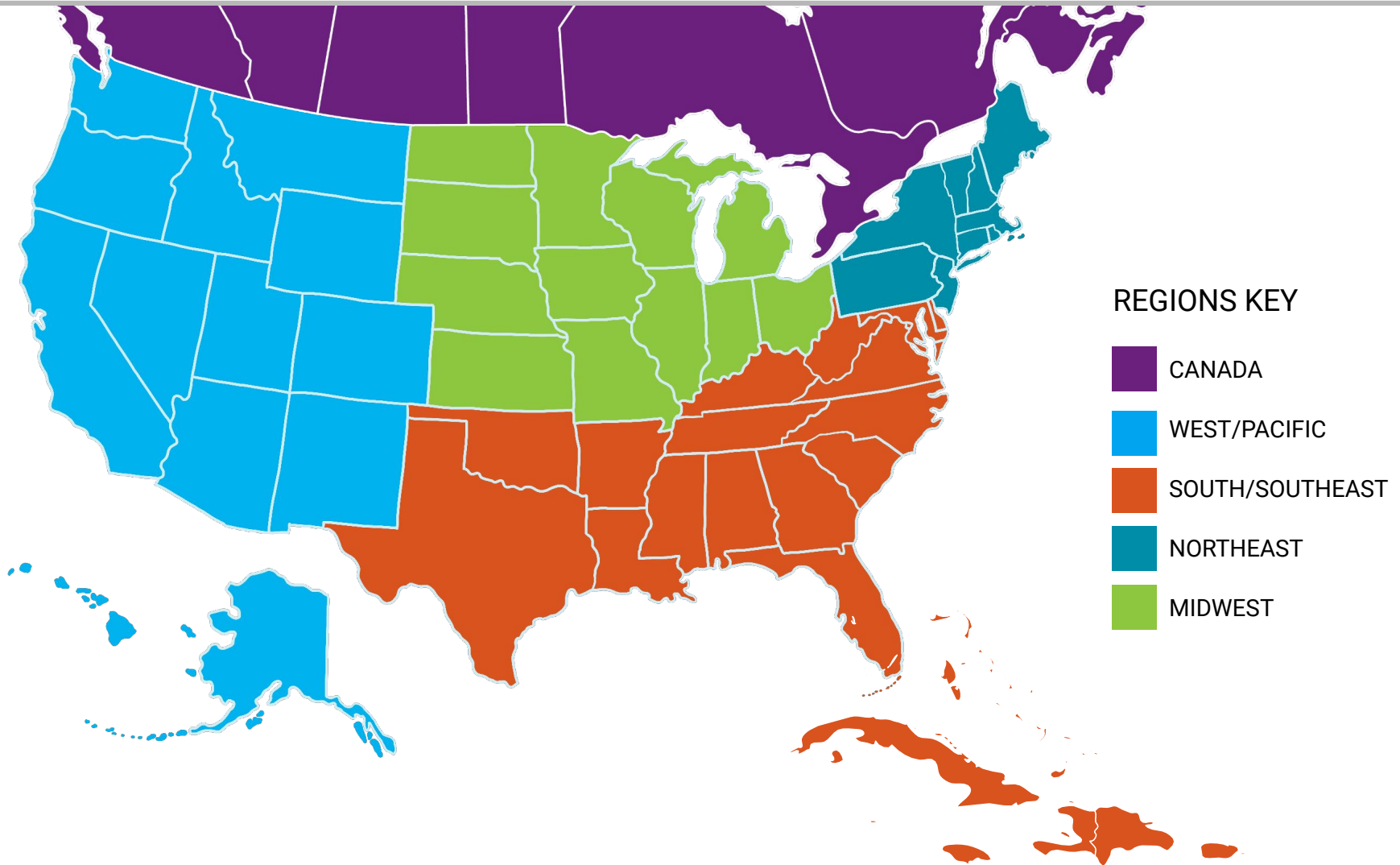
Midwest (43 destinations)

Northeast (21 destinations)

South/Southeast (99 destinations)

West/Pacific (43 destinations)

To further understand progress and pipeline trends, the industry aggregate of 215 DMOs were segmented by five regions. Each region is comprised of states, provinces, and/or territories. The legend is color-coded.

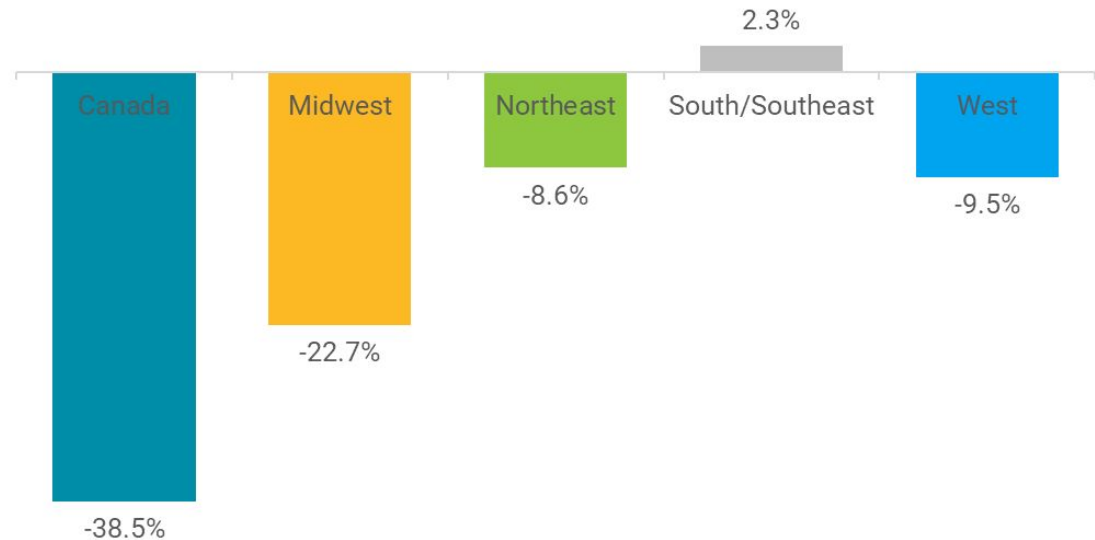


REGION COMPARISONS

Looking at lead volume by region, the South/Southeast is the only region where DMOs have a positive variance, with **2.3% more leads in the pipeline than in 2019.**

For Canadian DMOs, the negative 38.5% variance from 2019 leads looks alarming compared to other regions. However, it's important to note that in terms of sheer numbers, Canadian DMOs have 790 fewer leads in their pipeline, while the West has 1,800+ fewer leads in theirs.

Number of leads by region through June 2022 compared to 2019



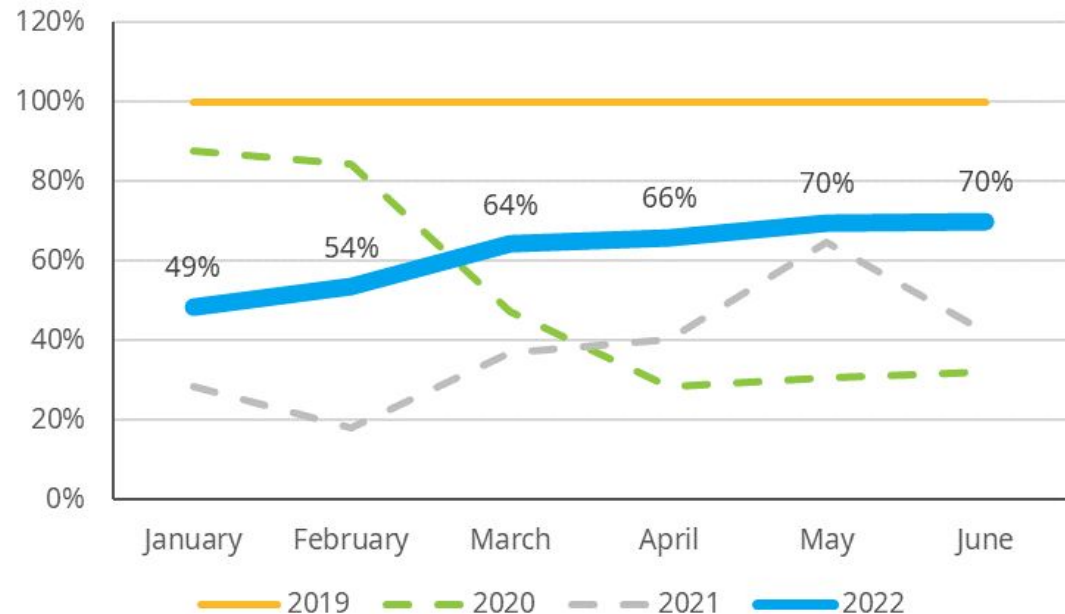


Canada: number of leads

Canada as a region lags farther behind recovery than other U.S. regions, but it's showing signs of continued recovery.

Total meeting leads are up 65% through June 2022 from 2021 levels and **are up 8% in the second quarter of 2022** compared to the first quarter.

Number of leads through June 2022
Percentage of 2019 index



Canada (9 destinations)



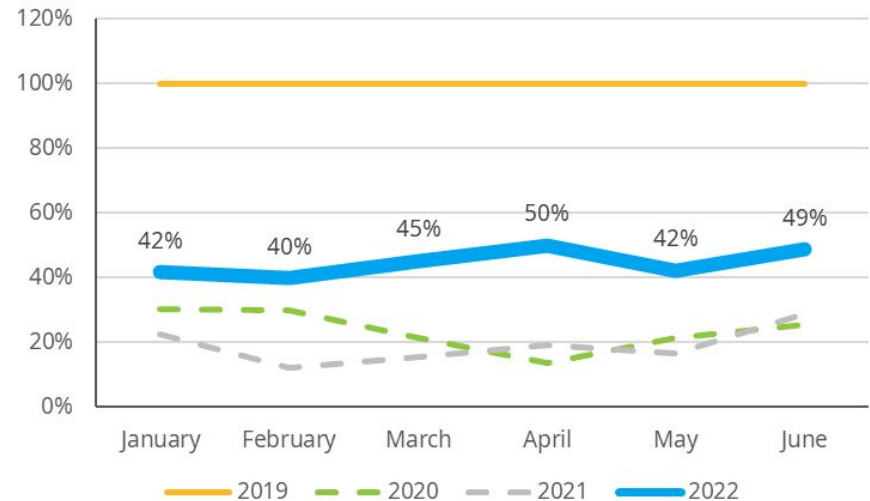
Canada: number of booked events

The number of hotel bookings is down 45% through June 2022 over 2019 levels, but they're up over 30% from 2021.

While booked convention center events are down 20% from 2019 through June 2022, the second quarter was **up 15% over the first quarter.**

The number of bookings for convention center events can vary month to month due to the low number of destinations in Canada. Nine are being measured; only five of those have convention centers.

Number of booked hotel meetings through June 2022 Percentage of 2019 index



Number of booked convention center events through June 2022 Percentage of 2019 index



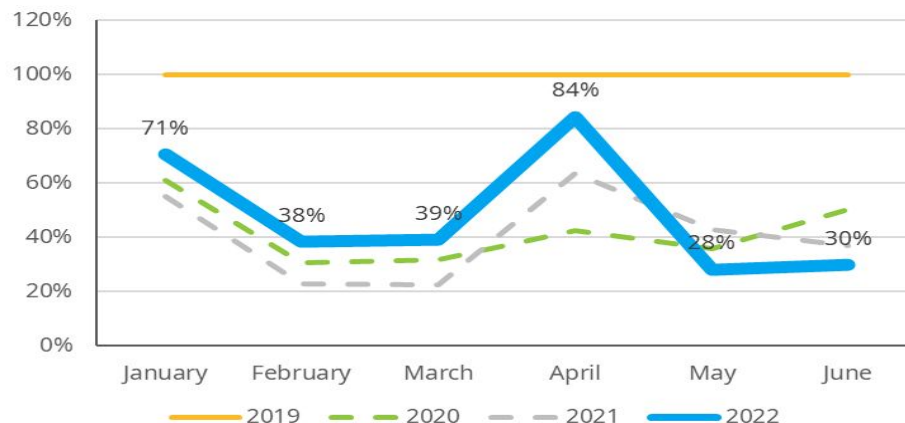
Canada: booked hotel meeting room nights & attendance

Canada bookings in room nights and attendance are down through June 2022 compared to the index of 2019 but up by 15% over 2021 in room nights and 162% in attendance.

In April 2022, several sporting events went definite with a large number of attendees, causing the spike seen in the graph.

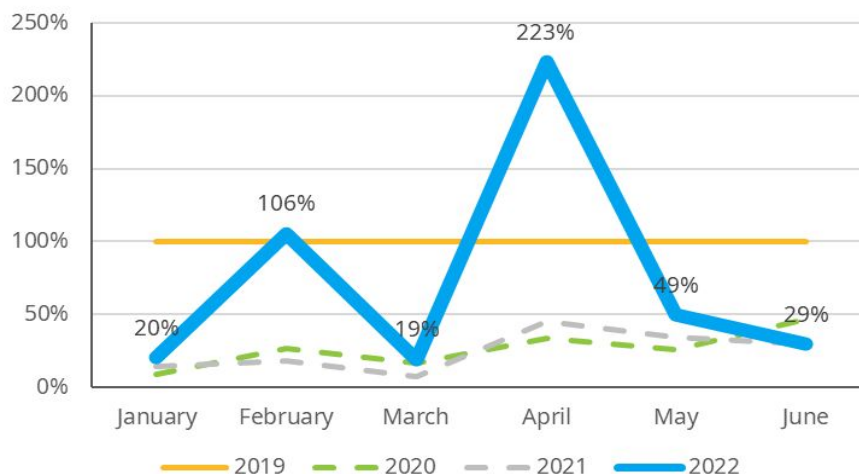
Booked hotel meeting room nights through June 2022

Percentage of 2019 index



Booked hotel meeting attendance through June 2022

Percentage of 2019 index



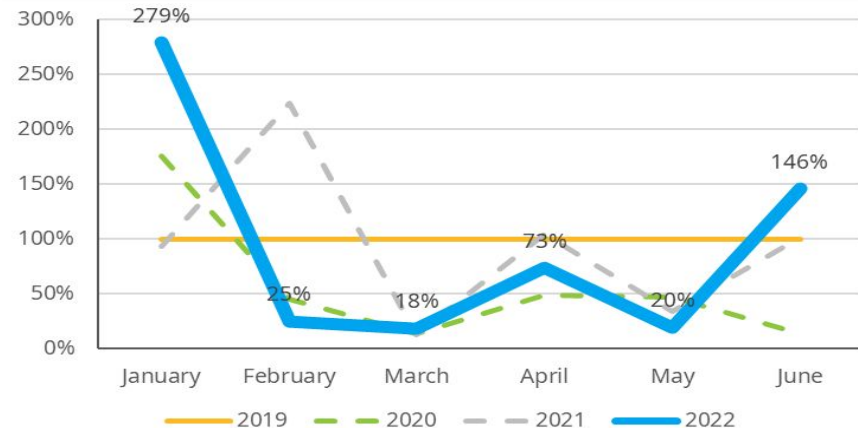


Canada: booked convention center event room nights & attendance

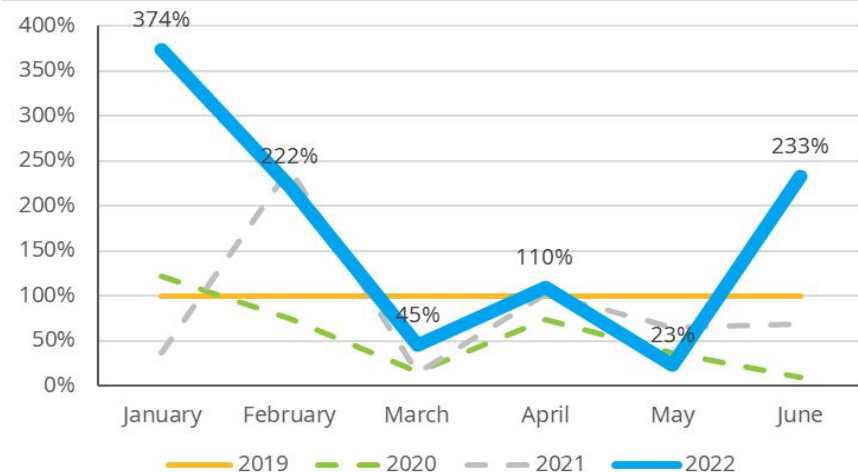
While there was a lot of fluctuation in 2022 month to month through June 2022, overall, **room nights are currently 44% below 2019 levels.**

Attendance is currently **28% above 2019 levels**, thanks to several large association meetings booked for a future period.

Booked convention center event room nights through June 2022
Percentage of 2019 index



Booked convention center events attendance through June 2022
Percentage of 2019 index



Canada: lead volume & room nights

What are we seeing?

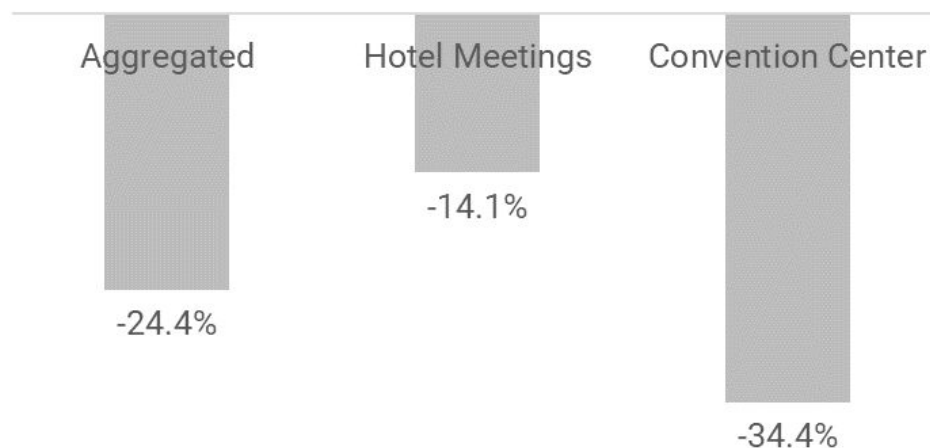
The number of leads in the DMO pipeline through June 2022 is down over 38% compared to 2019. This amounts to a **variance of nearly 800 leads**. The biggest contributor to this variance is hotel meetings leads, which are down almost 40%.

The average peak room for hotel meetings **increased just over 3%**.

Number of leads through June 2022 compared to 2019



Lead room nights through June 2022 compared to 2019



Canada: market segmentation & hotel meetings leads

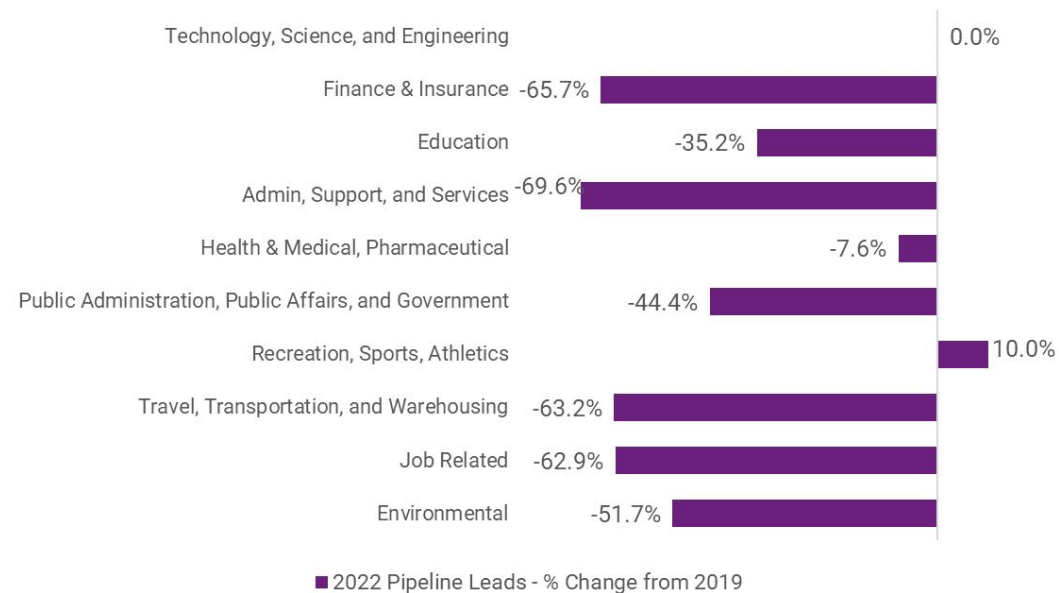
Here's what we found ...

The Top 10 market segments comprise 85% of 2019 hotel meeting bookings that could be categorized in MINT+ key classifications.

The number one market segment for hotel meeting leads in the pipeline is Technology, Science, and Engineering, which comprised 27% of 2019 bookings. For this market segment, Canadian DMOs have the **same number of leads in the pipeline as they did in 2019**.

The rest of the top 10 market segments trail 2019 leads.

Top 10 market segments: **number of hotel meeting leads** percentage variance comparing 2022 to 2019, through June



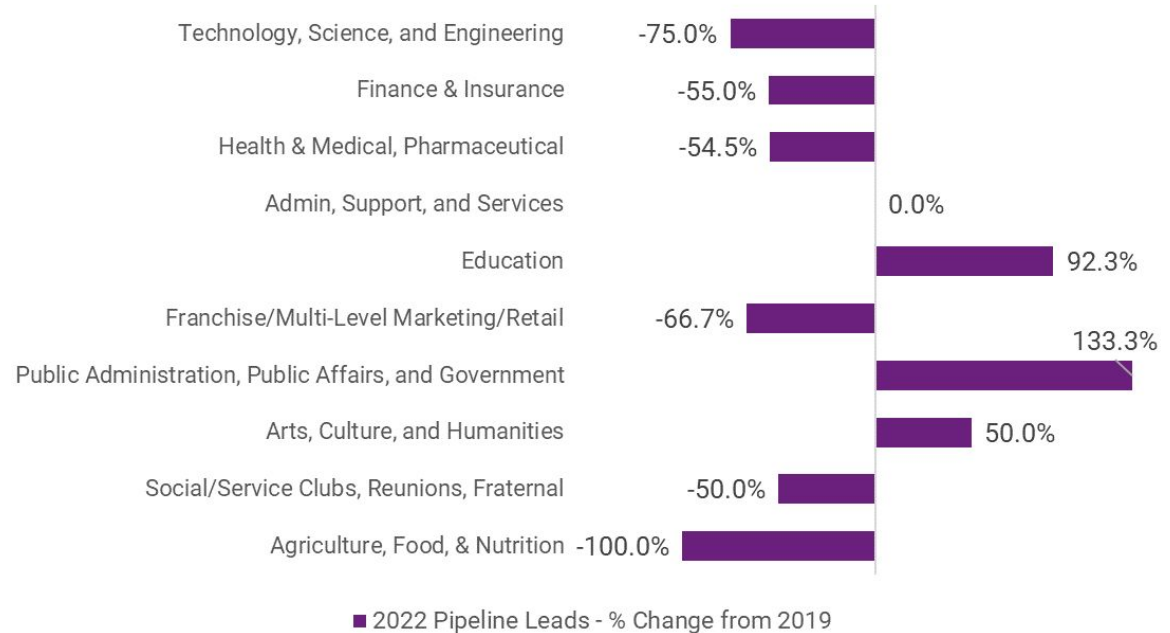
Canada: market segmentation & convention center leads

What does this **mean for you?**

The Top 10 highest market segments comprise 88% of 2019 convention center bookings that could be categorized in MINT+ key classifications.

Similar to hotel meetings, the number one market segment for convention center leads in the pipeline is Technology, Science, and Engineering, which comprised 29% of 2019 leads. In 2022, there were **75% fewer convention center leads in this segment.**

Top 10 market segments: **number of convention center event leads** percentage variance comparing 2022 to 2019, through June



MIDWEST

Progress and pipeline health

Midwest (43 destinations)



Midwest: number of leads

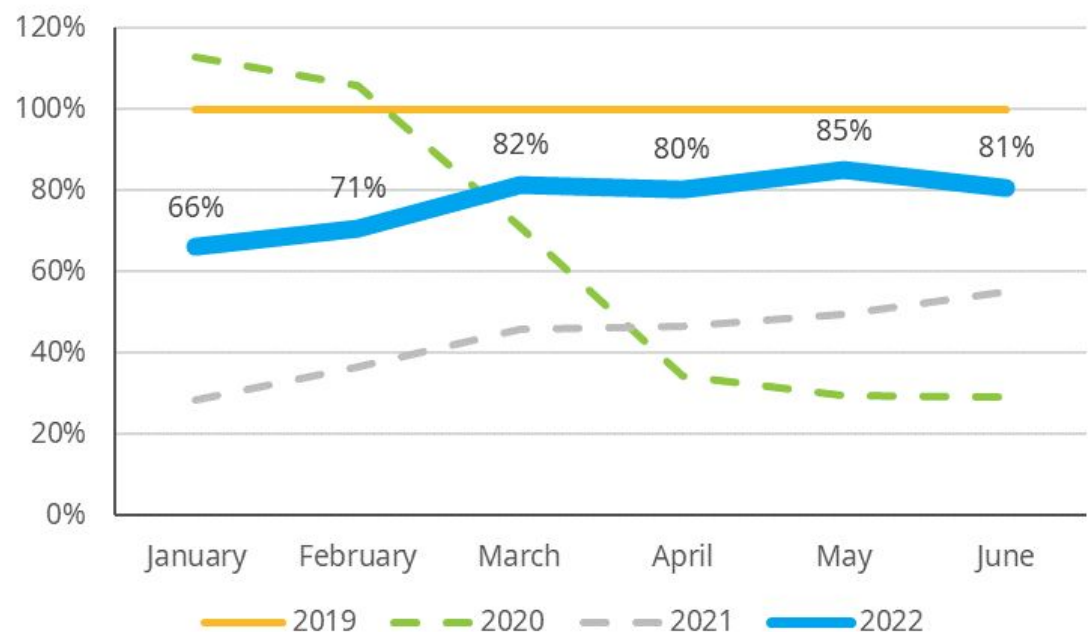
Here's what we're seeing ...

Through June 2022, the number of leads are down 23% from 2019 levels. However, the second quarter ending June 2022 is **up 10% over the first quarter**.

While the Midwest continues to see progress in the number of leads, the industry aggregate of DMOs are **at 99% of 2019 levels**.

Number of leads through June 2022

Percentage of 2019 index





Midwest: number of booked events

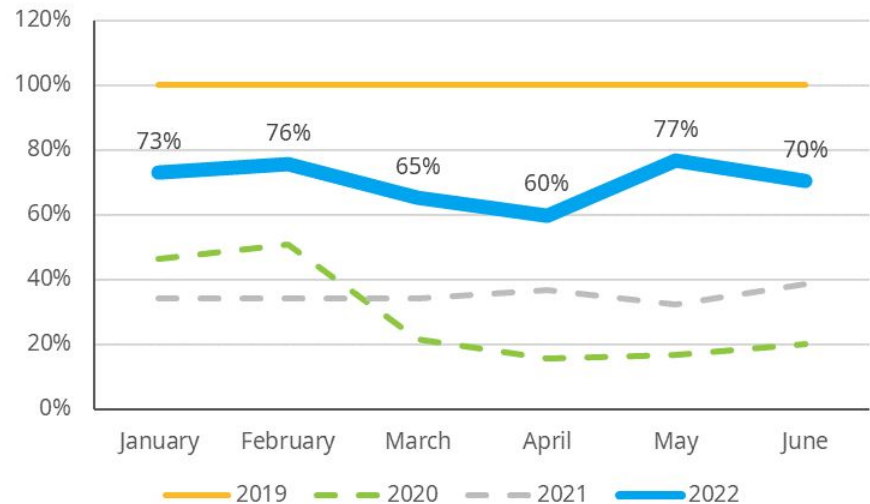
In the Midwest region, the number of booked convention center events has seen a stronger recovery thus far compared to hotel bookings.

Currently, the number of booked convention center events is up nearly 5% over 2019 levels.

The number of booked hotel meetings is down 30% over 2019 levels but up over 98% from 2021.

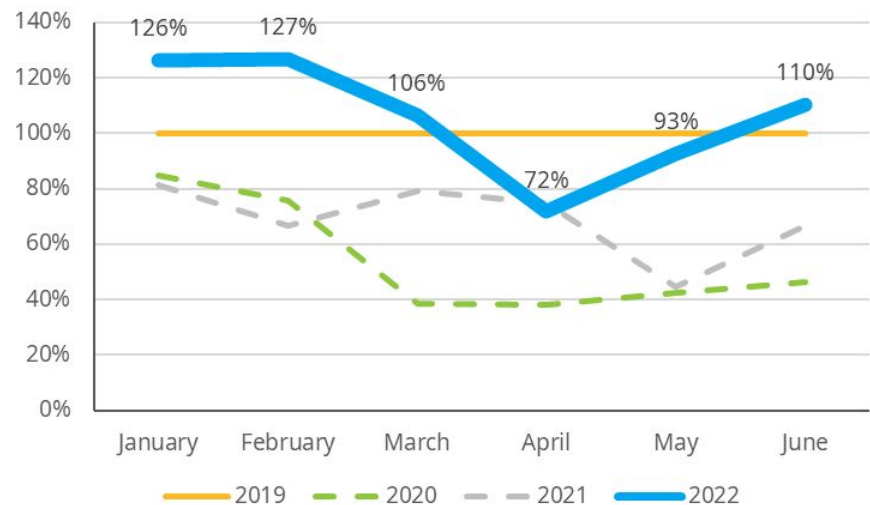
Number of booked hotel meetings

Percentage of 2019 index



Number of booked convention center events through June 2022

Percentage of 2019 index



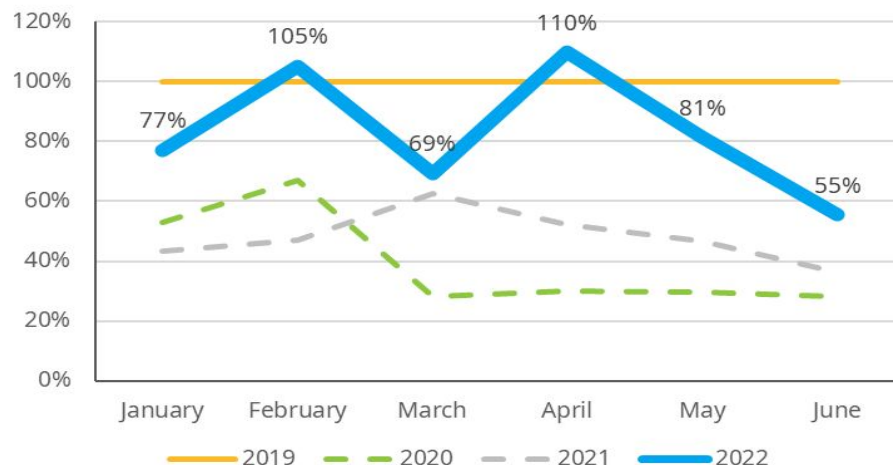


Midwest: booked hotel meeting room nights & attendance

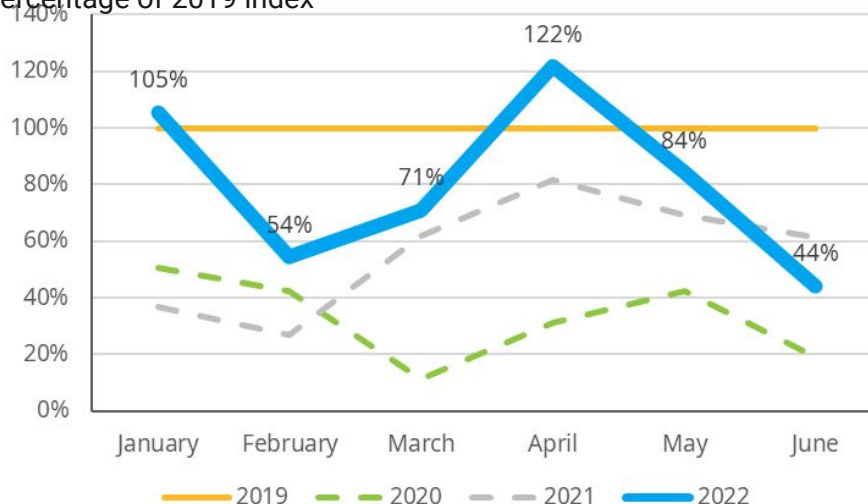
Through June 2022, overall booked hotel meeting room nights were down 20% from 2019, but up 68% from 2021.

Through June 2022, booked hotel meeting attendance is down 25% from 2019 levels and down 17% in Q2 compared with Q1.

Booked hotel meeting room nights through June 2022
Percentage of 2019 index



Booked hotel meeting attendance through June 2022
Percentage of 2019 index



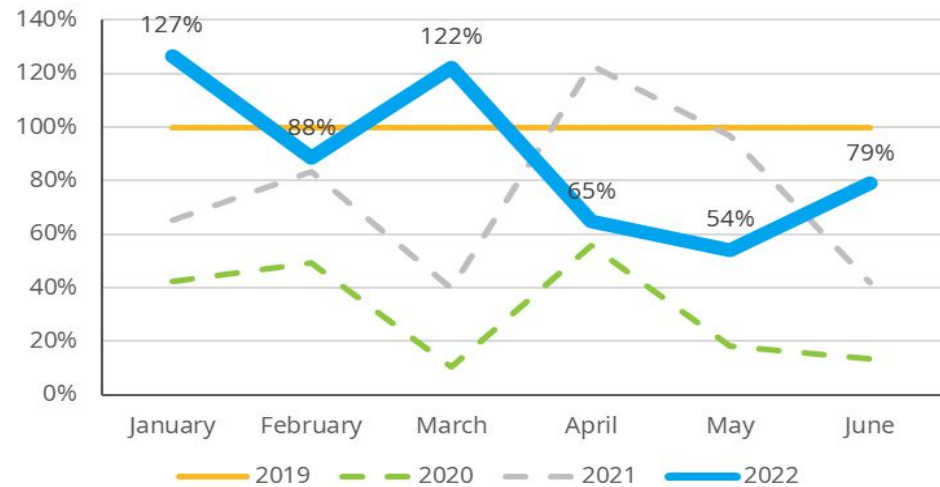


Midwest: booked convention center event room nights & attendance

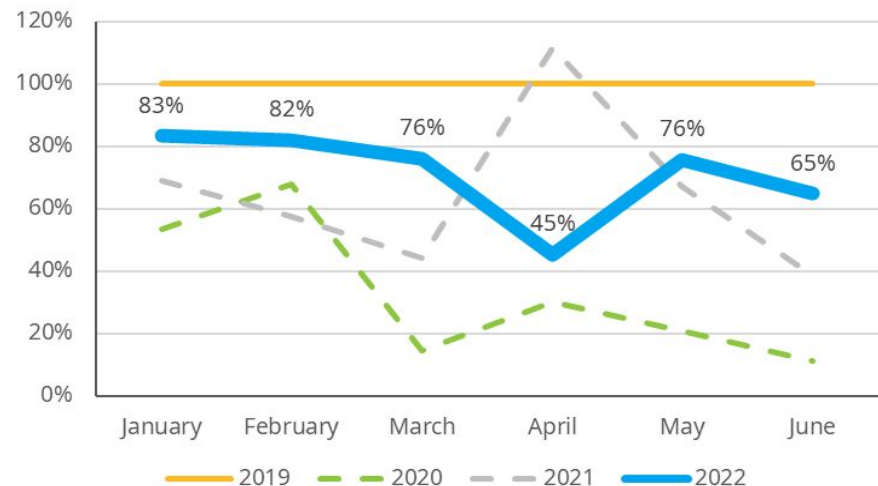
Booked convention center event room nights have yet to show consistency month to month through June 2022, with a low of 54% in May and a high of 127% in January. Overall, however, room nights are down only 14% compared to 2019.

Booked convention center events attendance lags room night recovery and is currently -30% of 2019.

Booked convention center event room nights through June 2022
Percentage of 2019 index



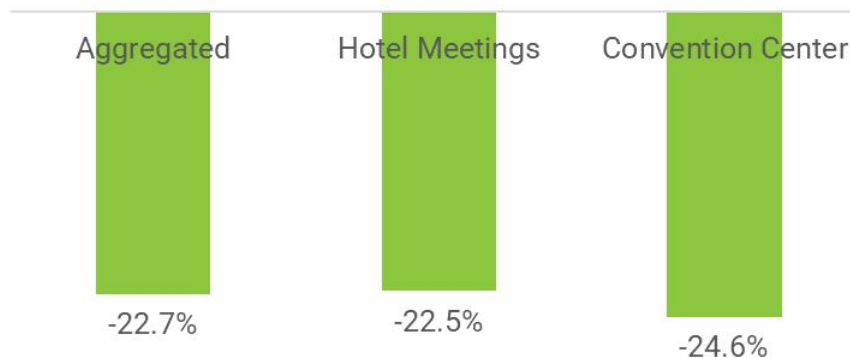
Booked convention center events attendance through June 2022
Percentage of 2019 index



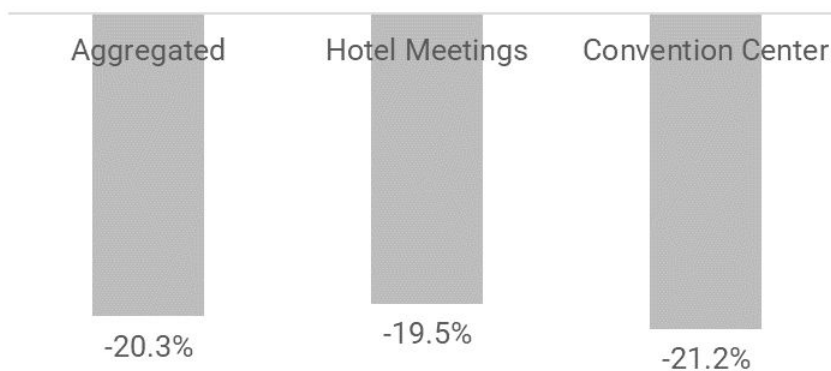
Midwest: lead volume & room nights

The number of leads in the DMO pipeline is down 22.7% compared to 2019. The biggest contributor to this variance is the number of hotel meetings leads, which is down almost 23% and amounts to over 1,700 leads compared to convention center event leads, while down 24.6% to 2019 leads, amounts to 248 less leads in the pipeline

Number of leads through June 2022 compared to 2019



Lead room nights through June 2022 compared to 2019



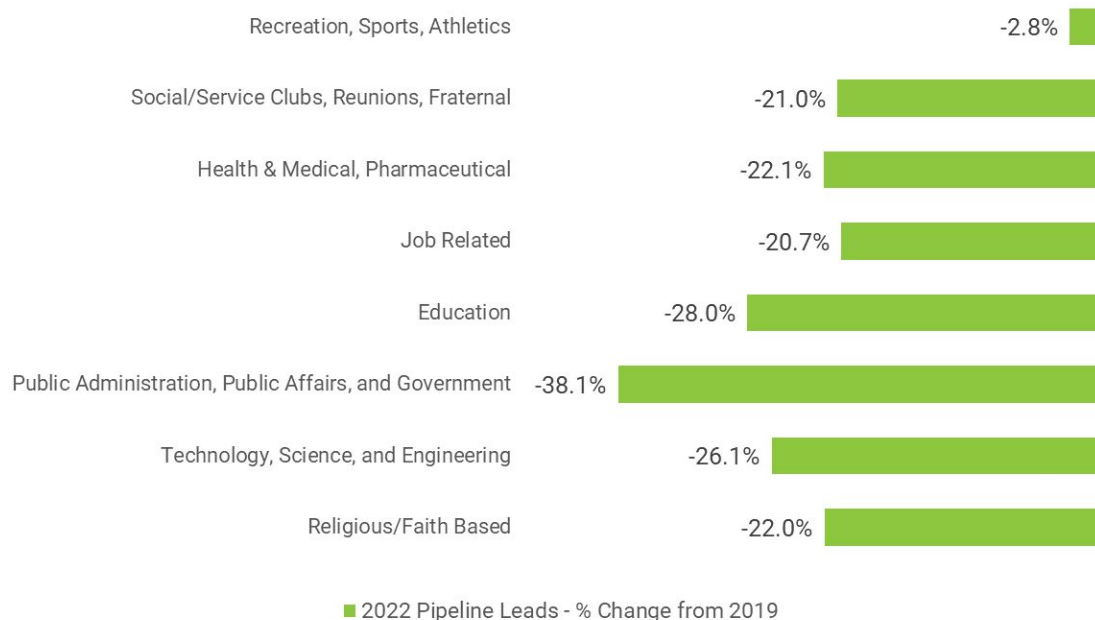
Midwest: market segmentation & hotel meeting leads

The **Top 8 highest market segments** comprise **85% of 2019 leads** that could be categorized in MINT+ key classifications.

The number one market segment for hotel meeting leads in the pipeline is Recreation, Sports, and Athletics, which comprised 28% of 2019 leads. Through June 2022, there were **only 3% fewer hotel meeting leads in this segment**, an indicator that this region is active in this market segment.

All other top market segments have significantly fewer leads in 2022 than the 2019 pipeline.

Top 8 market segments: **number of hotel meeting leads** percentage variance comparing 2022 to 2019, through June

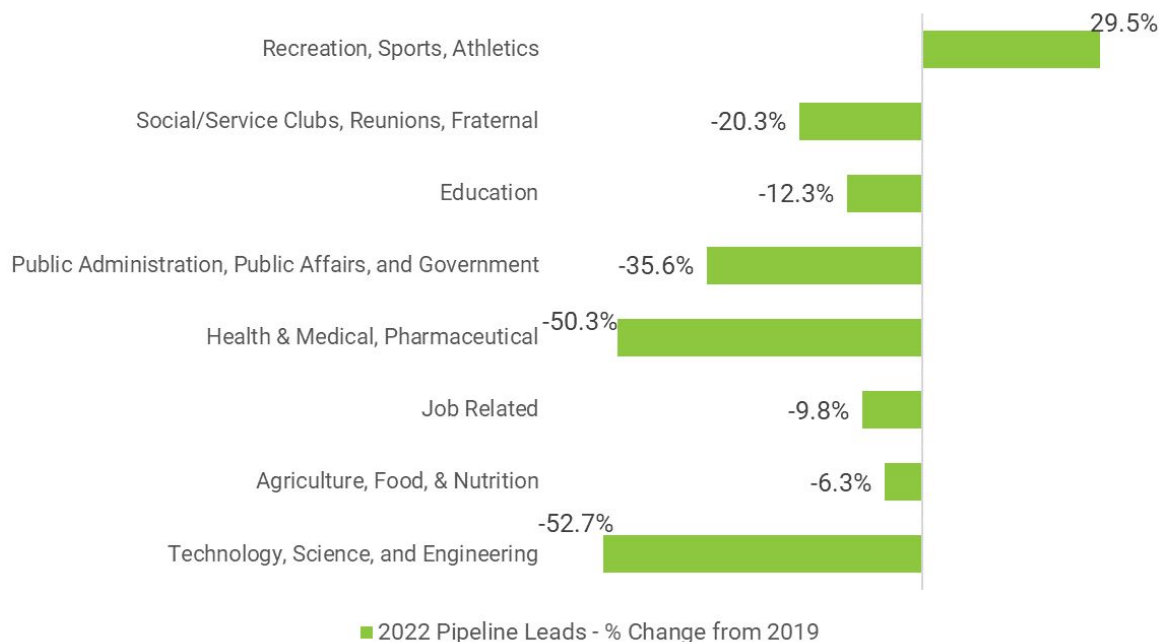


Midwest: market segmentation & convention center leads

The Top 8 highest market segments comprise 83% of 2019 leads that could be categorized in MINT+ key classifications.

The number one market segment for convention center event leads in the pipeline, similar to hotel meetings, is Recreation, Sports, and Athletics, which comprised **16% of 2019 leads**. Through June 2022, this segment had 29.5% fewer convention center leads.

Top 8 market segments: **number of convention center event leads** percentage variance comparing 2022 to 2019, through June



NORTHEAST

Progress and pipeline health

Northeast (21 destinations)



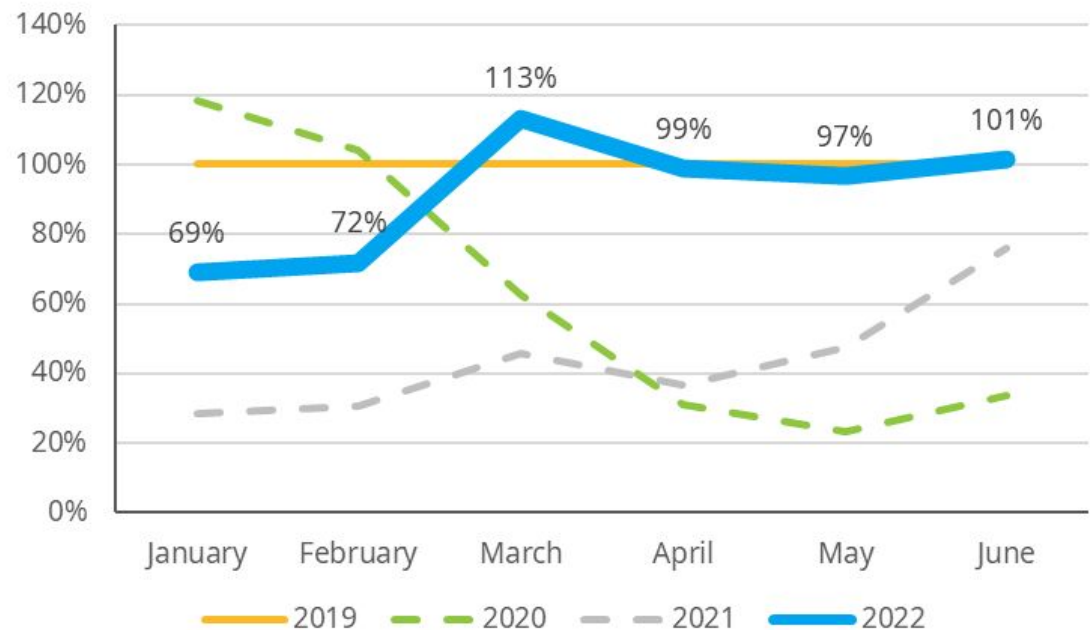
Northeast: number of leads

The number of leads is down 9% from 2019 levels but up 53% from 2021.

January and February 2022 saw a low number of leads, but from March to June, **leads are up 3% compared to 2019.**

Northeast (21 destinations)

Number of leads through June 2022
Percentage of 2019 index



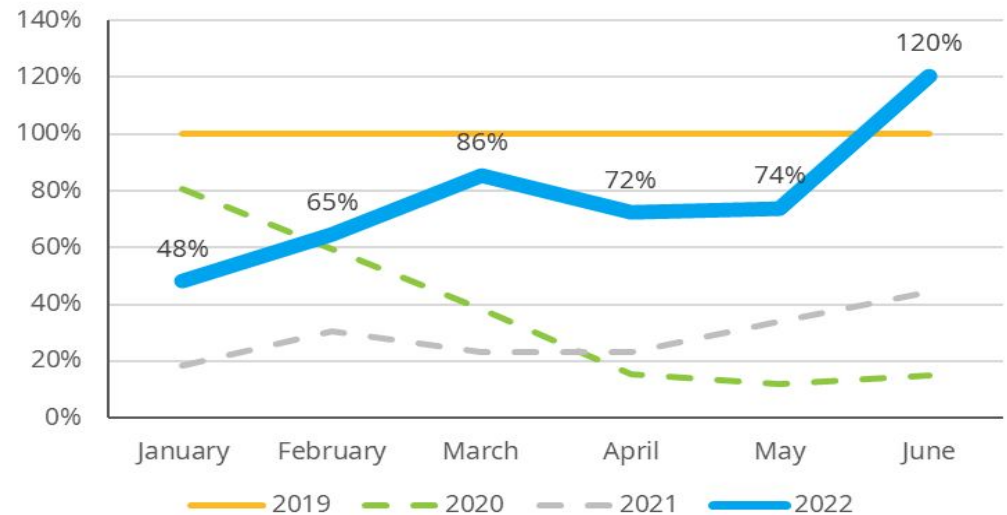


Northeast: number of booked events

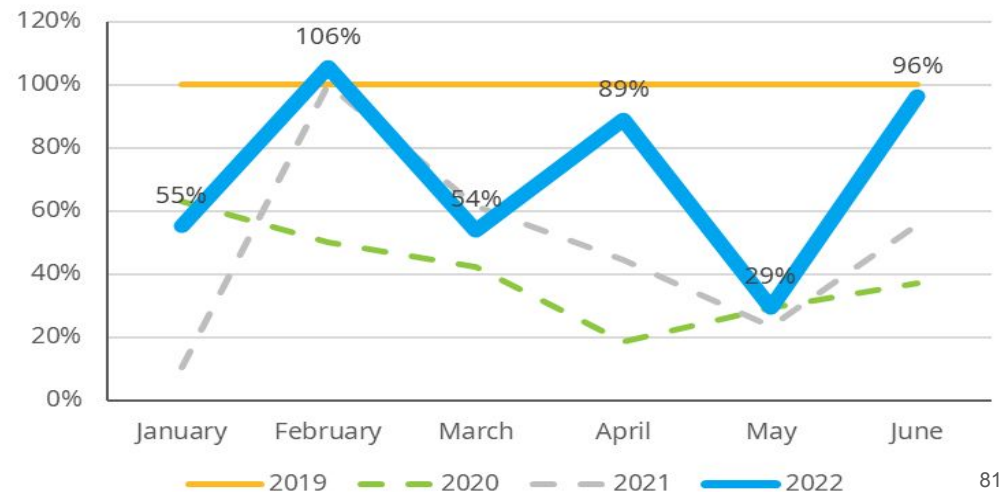
Through June 2022, the number of booked hotel meetings was down 23% over 2019, but the number was up 34% in Q2 compared to Q1.

The number of booked convention center events is down 33% from 2019; however, **they're up 56% over 2021.**

Number of booked hotel meetings
Percentage of 2019 index



Number of booked convention center events through June 2022
Percentage of 2019 index





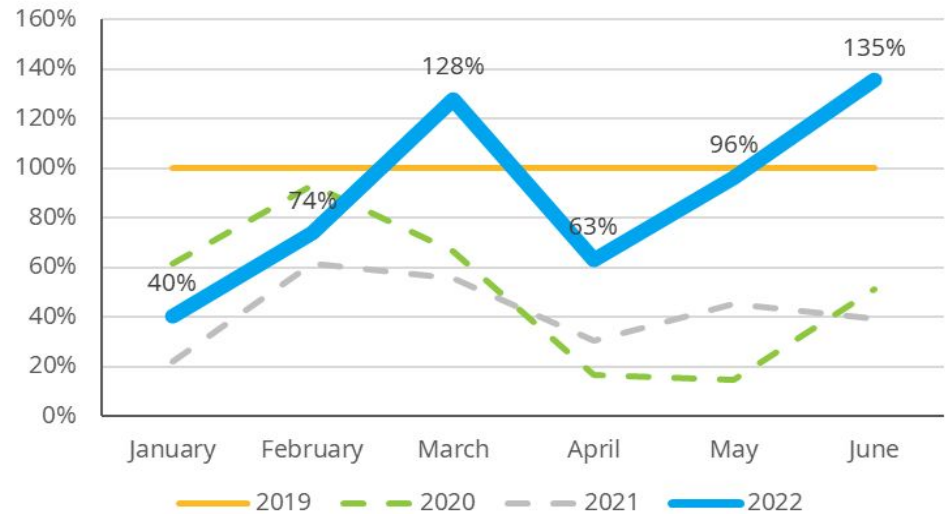
Northeast: booked hotel meeting room nights & attendance

Through June 2022, booked hotel meeting room nights are down 12% from 2019. They're up 24% in Q2 compared to Q1.

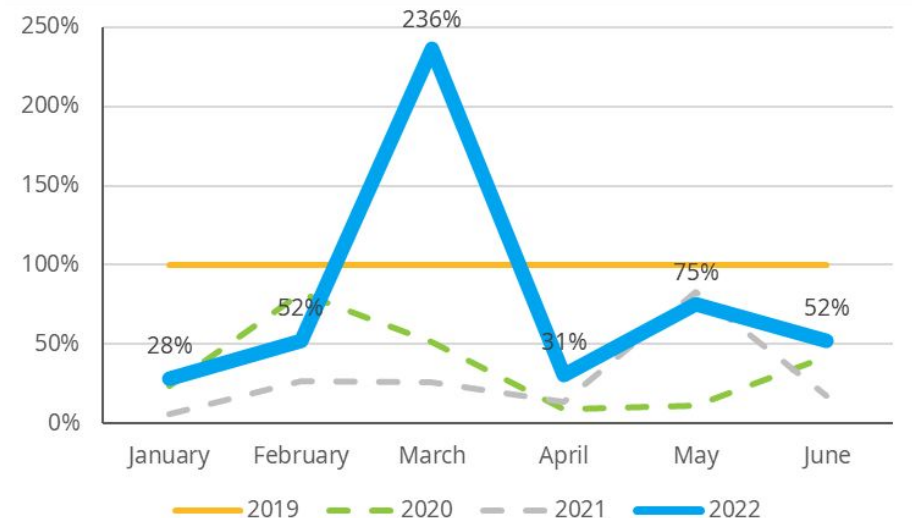
Through June 2022, the booked hotel meeting attendance is down 30% from 2019 levels but up 241% from 2021.

For attendance, one large athletic association booking in March **made up 33% of total attendance for that month.**

Booked hotel meeting room nights through June 2022
Percentage of 2019 index



Booked hotel meeting attendance through June 2022
Percentage of 2019 index



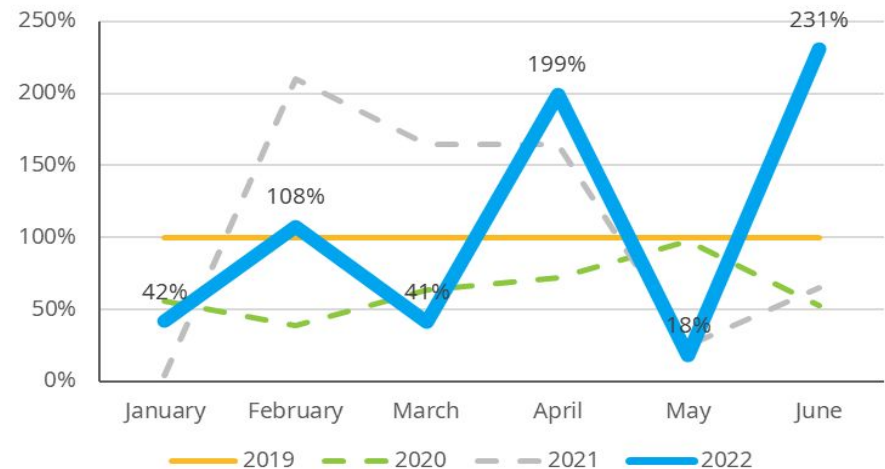


Northeast: booked convention center event room nights & attendance

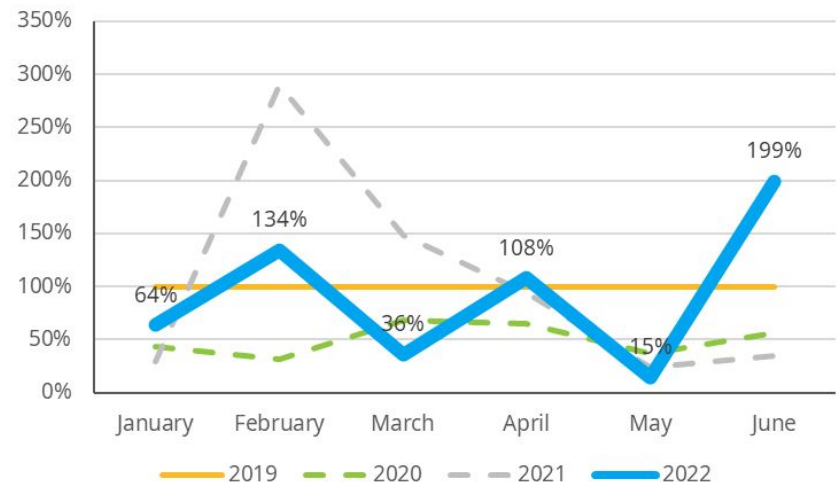
For the Northeast, booked convention center room nights have seen great swings in 2022 thus far. However, room nights are down overall by only 14% compared to 2019 and up 48% in Q2 compared to Q1.

Through June 2022, booked convention center events attendance is down 14% compared to 2019 and is even with 2021.

Booked convention center event room nights through June 2022
Percentage of 2019 index



Booked convention center events attendance through June 2022
Percentage of 2019 index

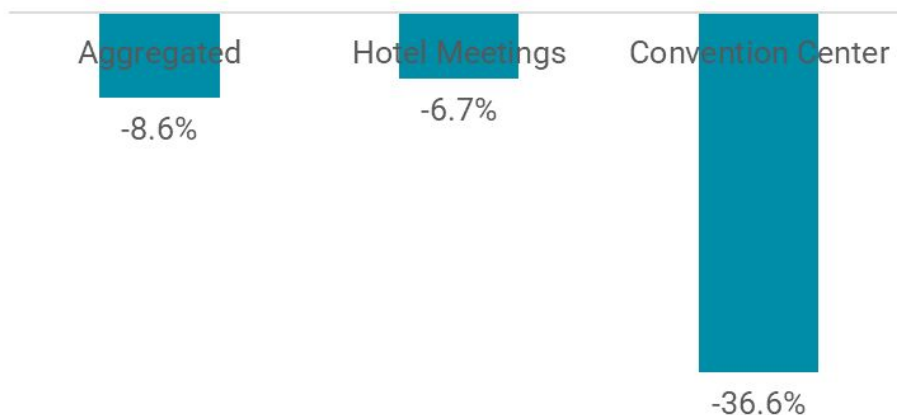


Northeast: lead volume & room nights

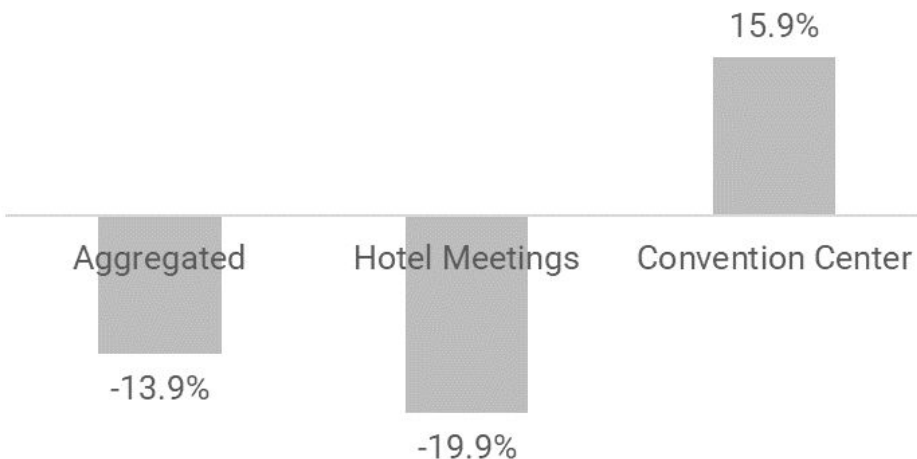
The number of leads in the DMO pipeline is down 8.6% compared to 2019 and amounts to a variance of **433 leads**. The biggest contributor to this variance is hotel meetings leads, which were down 6.7%, representing 73% of the 433 lead variance.

The average peak room for convention center event **leads grew over 60%**, contributing to the positive variance of convention center event lead room nights over 2019.

Number of leads through June 2022 compared to 2019



Lead room nights through June 2022 compared to 2019

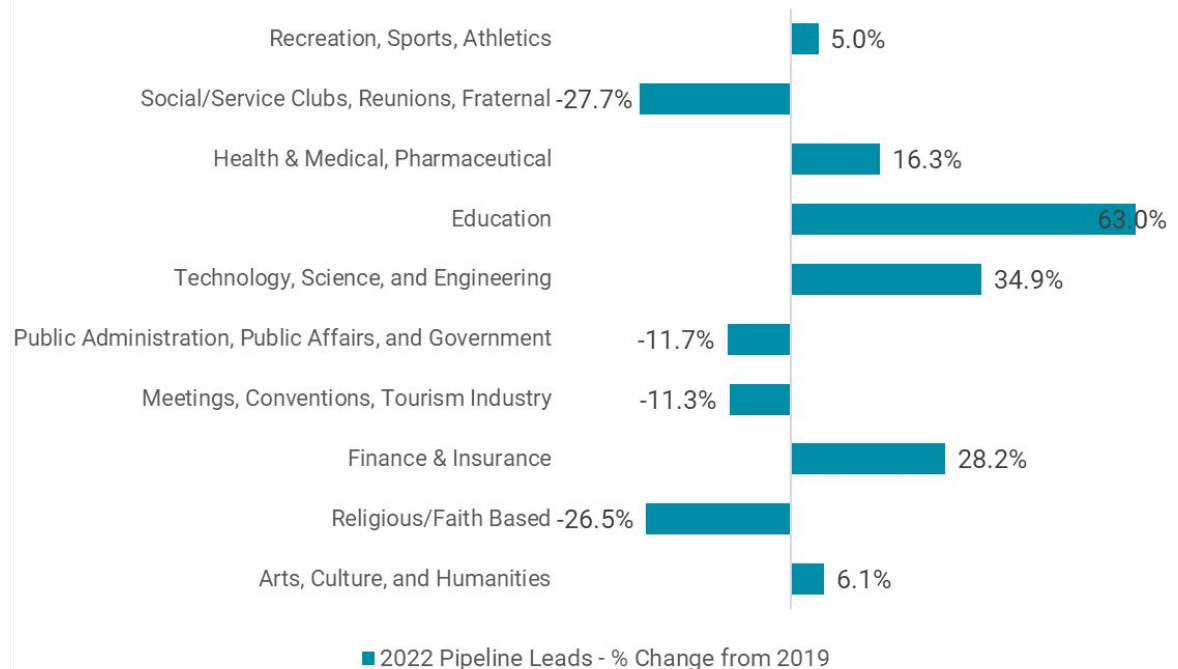


Northeast: market segmentation & hotel meeting leads

The Top 10 market segments comprise 91% of 2019 leads that could be categorized in MINT+ key classifications.

The number one market segment for hotel meeting leads in the pipeline is Recreation, Sports, and Athletics, which comprised **23% of 2019 leads**. Through June 2022, there were 5% more hotel meeting leads in this segment.

Top 10 market segments: **number of hotel meeting leads** percentage variance comparing 2022 to 2019, through June

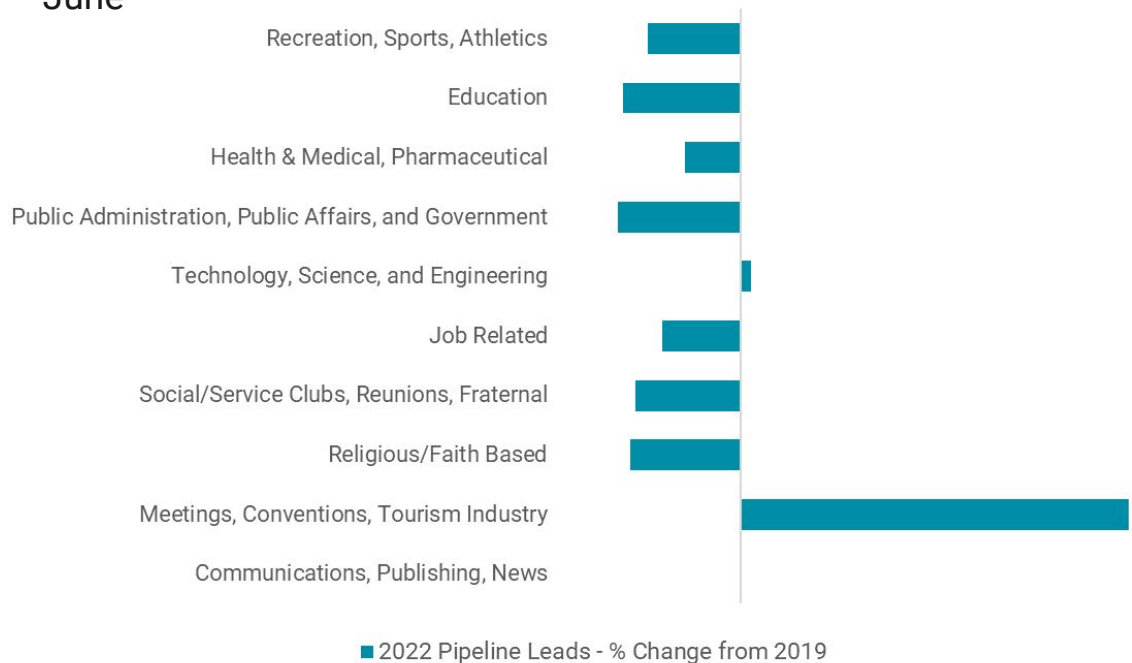


Northeast: market segmentation & convention center leads

The Top 10 market segments comprise 93% of 2019 leads that could be categorized in MINT+ key classifications.

Like hotel meetings, the number one market segment for convention center event leads in the pipeline is Recreation, Sports, and Athletics, **comprising 22% of 2019 leads**. Through June 2022, this segment had 54.2% fewer convention center event leads.

Top 10 market segments: **number of convention center event leads** percentage variance comparing 2022 to 2019, through June



SOUTH/SOUTHEAST

Progress and pipeline health

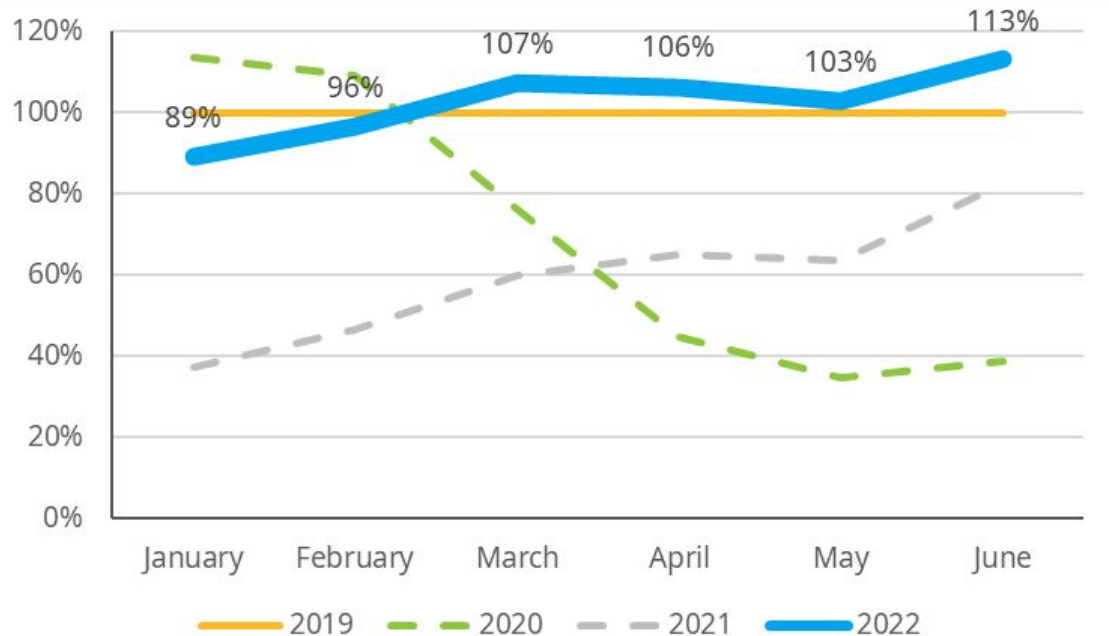
South/Southeast (99 destinations)

South/Southeast: number of leads

The South/Southeast region has thus far seen the strongest recovery in the number of leads compared to other regions. Total meeting leads are up 2% from 2019 levels. March, April, May, and June 2022 each exceeded 100%.

*South/Southeast
(99 destinations)*

Number of leads through June 2022
Percentage of 2019 index



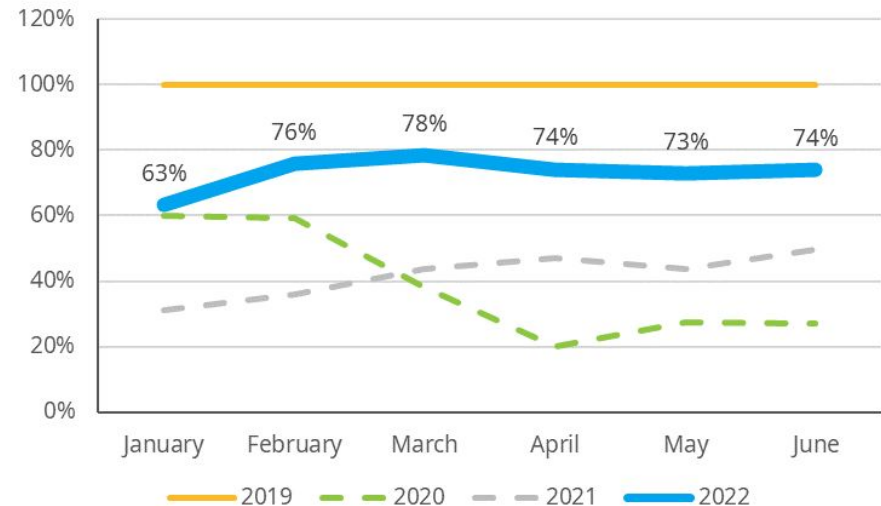


South/Southeast: number of booked events

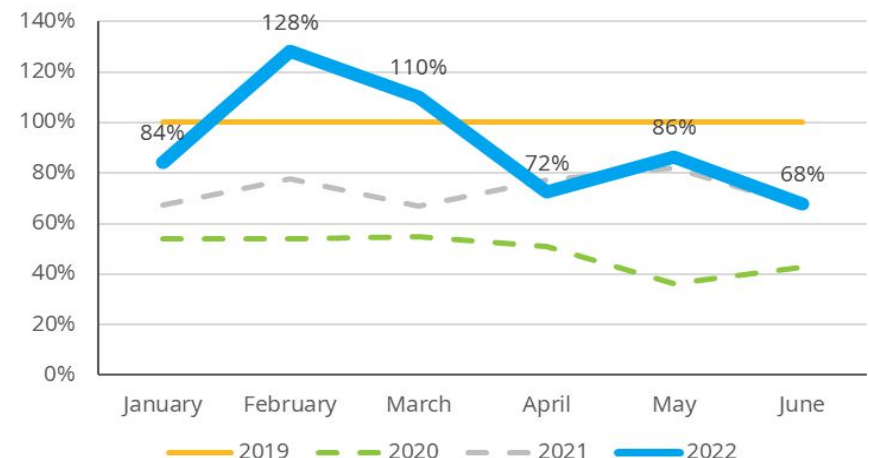
Hotel bookings have been consistently over 70% of 2019 levels starting in February 2022; however, the number of booked hotel meetings through June 2022 is down 27% over 2019 levels. The second quarter of 2022 is down 2% compared to the first quarter.

The number of booked convention center events is down 12% from 2019; however, **bookings are up 22% from 2021.**

Number of booked hotel meetings through June 2022
Percentage of 2019 index



Number of booked convention center events through June 2022
Percentage of 2019 index





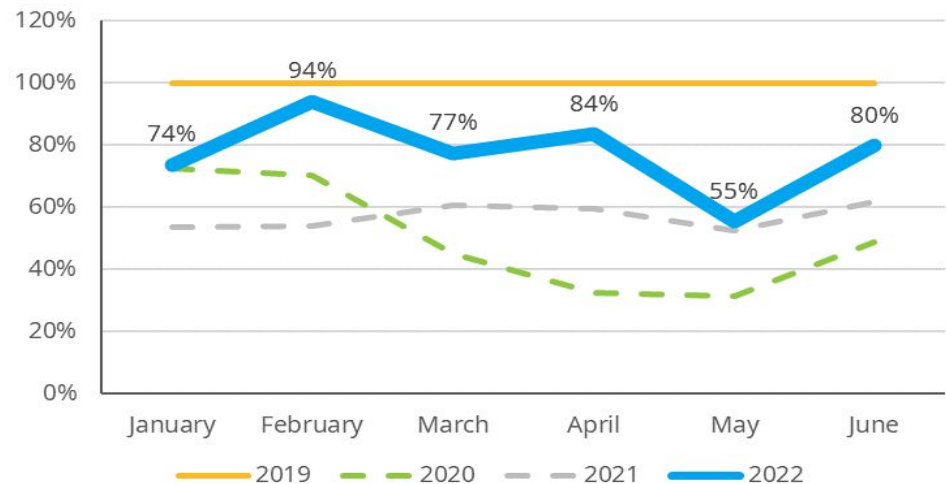
South/Southeast:

Booked hotel meeting room nights & attendance

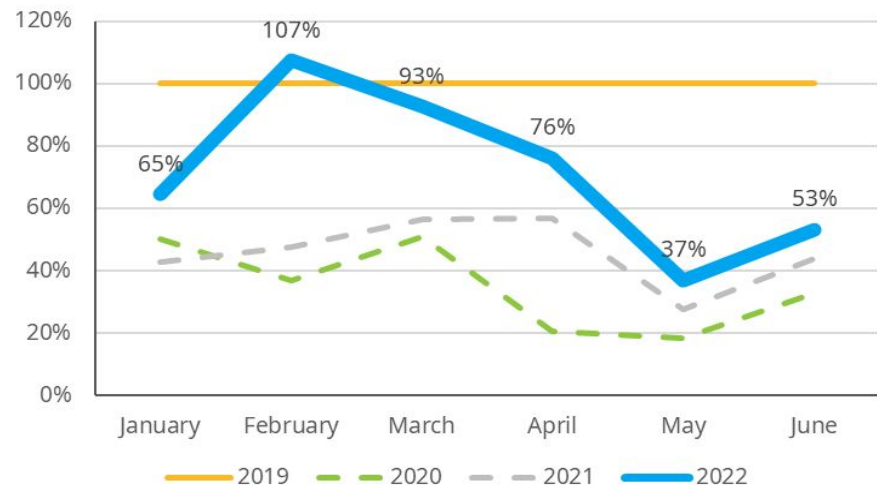
Booked hotel meeting room nights are down 23% from 2019 and down in the second quarter by 12% compared to the first quarter.

Booked hotel meeting attendance is down 34% from 2019 but up 54% from 2021.

Booked hotel meeting room nights through June 2022
Percentage of 2019 index



Booked hotel meeting attendance through June 2022
Percentage of 2019 index





South/Southeast: booked convention center event room nights & attendance

Booked convention center event room nights are down 17% from 2019 but up 26% from 2021 levels.

Booked convention center event attendance is down 11% through June 2022 compared to 2019, with strong months in February, March and May.

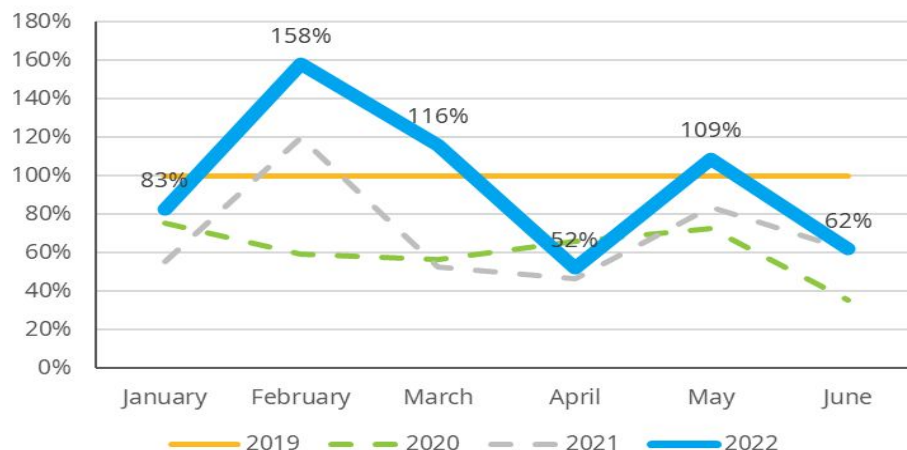
Booked convention center event room nights through June 2022

Percentage of 2019 index



Booked convention center attendance through June 2022

Percentage of 2019 index



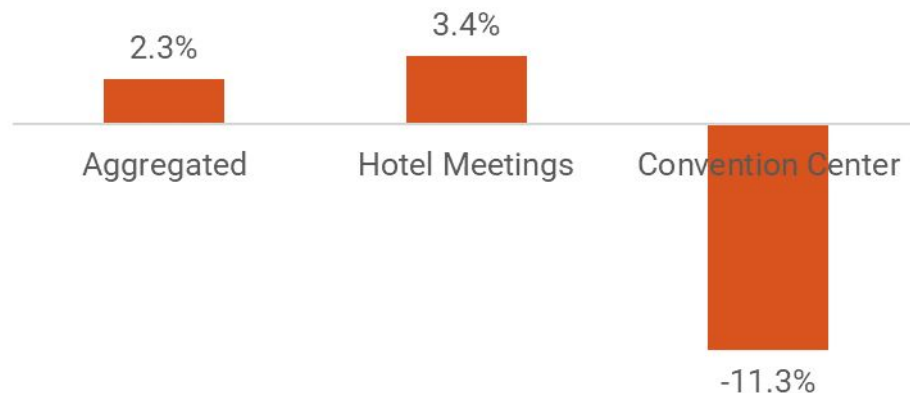
South/Southeast: lead volume & room nights

What does this **mean for you?**

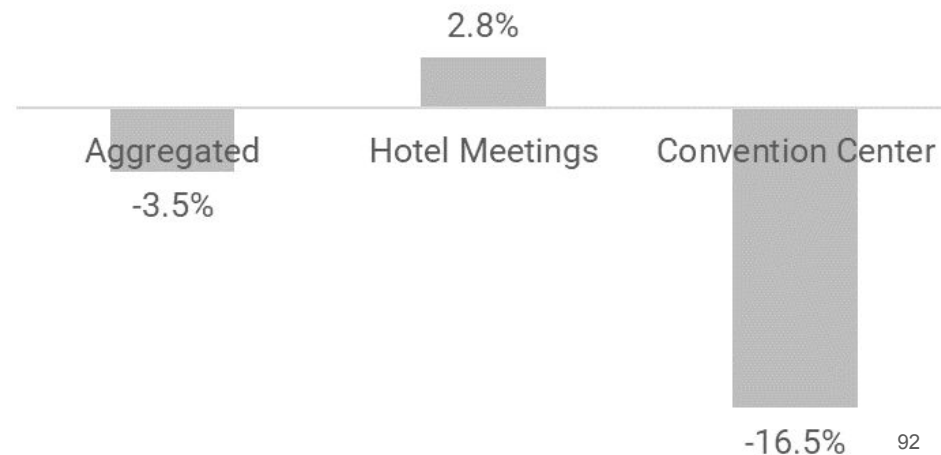
The number of leads in the DMO pipeline grew by 2.3% compared to 2019 and amounts to a variance of over 800 leads. Hotel meetings are primarily responsible for this lead growth since convention center leads decreased by 11.3%.

The average peak room for hotel meetings remained relatively **unchanged from 2019**. Conversely, the average peak room for convention center leads decreased by 4.5%.

Number of leads through June 2022 compared to 2019



Lead room nights through June 2022 compared to 2019



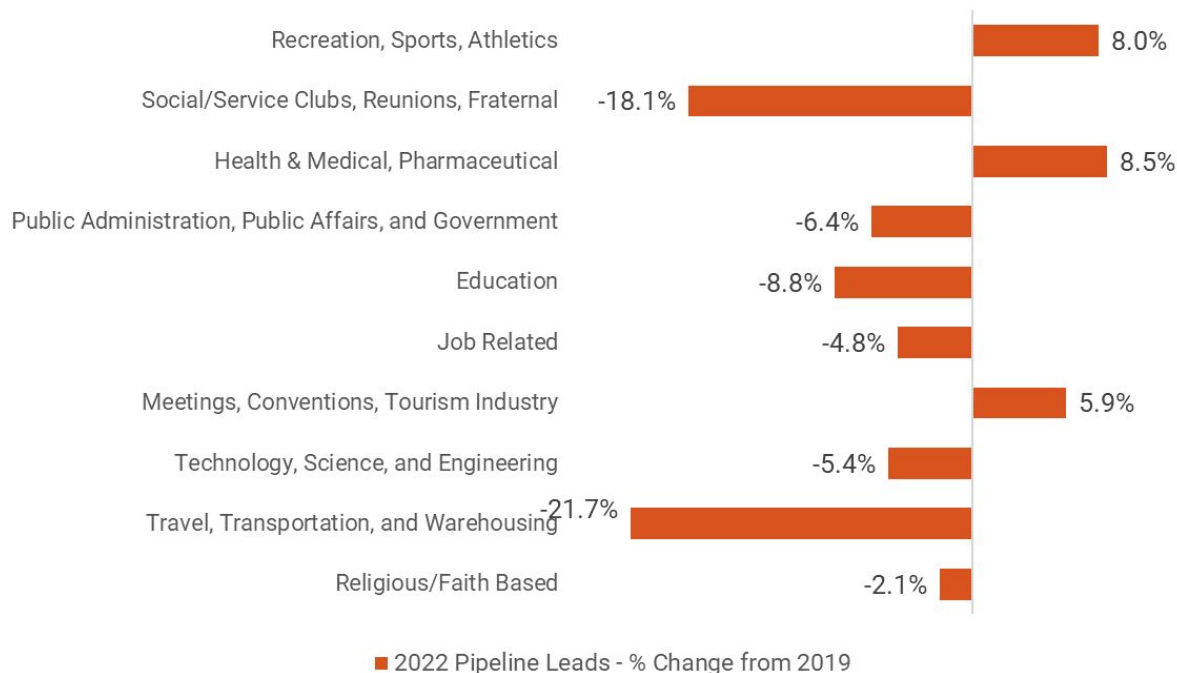
South/Southeast: market segmentation & hotel meeting leads

What are **we seeing?**

The Top 10 highest market segments comprise 86% of 2019 leads that could be categorized in MINT+ key classifications.

The number one market segment for convention center leads in the pipeline is Recreation, Sports, Athletics, which comprised **19% of 2019 leads**. In 2022, this segment had **8% more hotel meeting leads**.

Top 10 market segments: **number of hotel meeting leads**
percentage variance comparing 2022 to 2019, through June



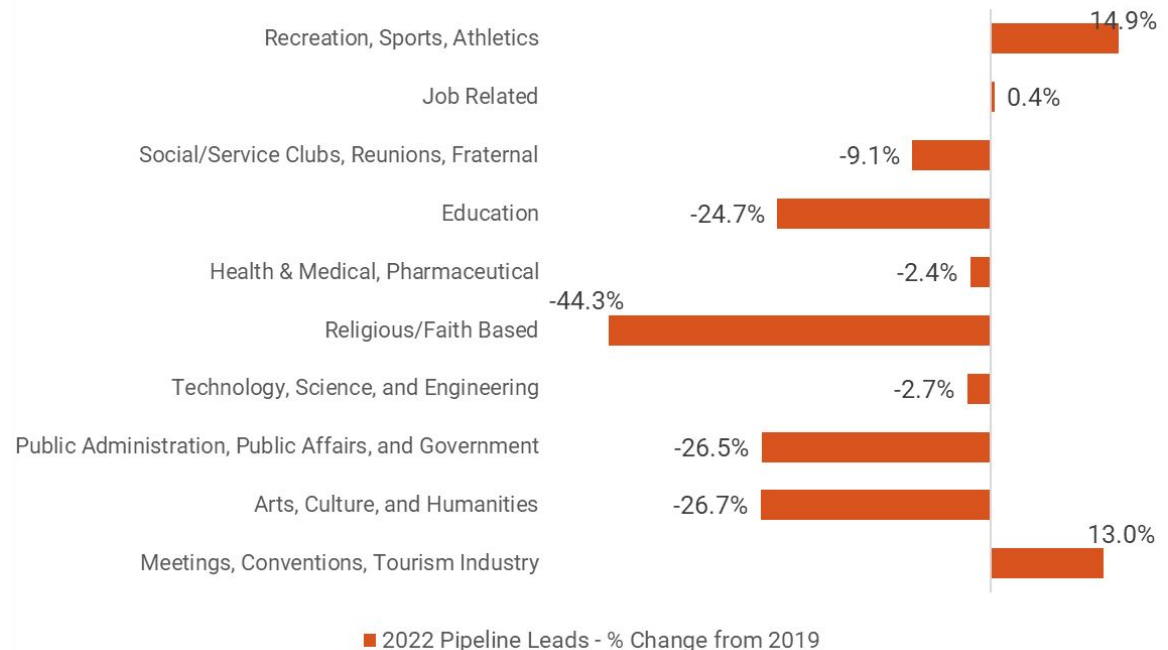
South/Southeast: market segmentation & convention center leads

What does this **mean for you?**

The Top 10 highest market segments comprise 91% of 2019 bookings that could be categorized in MINT+ key classifications.

Similar to hotel meetings, the number one market segment for convention center leads in the pipeline is Recreation, Sports, Athletics, which comprised 20% of 2019 bookings. In 2022, there were **14.9% more convention center leads in this segment.**

Top 10 market segments: **number of convention center event leads** percent variance comparing 2022 to 2019, through June



WEST/PACIFIC

Progress and pipeline health

West/Pacific (43 destinations)

West/Pacific: number of leads

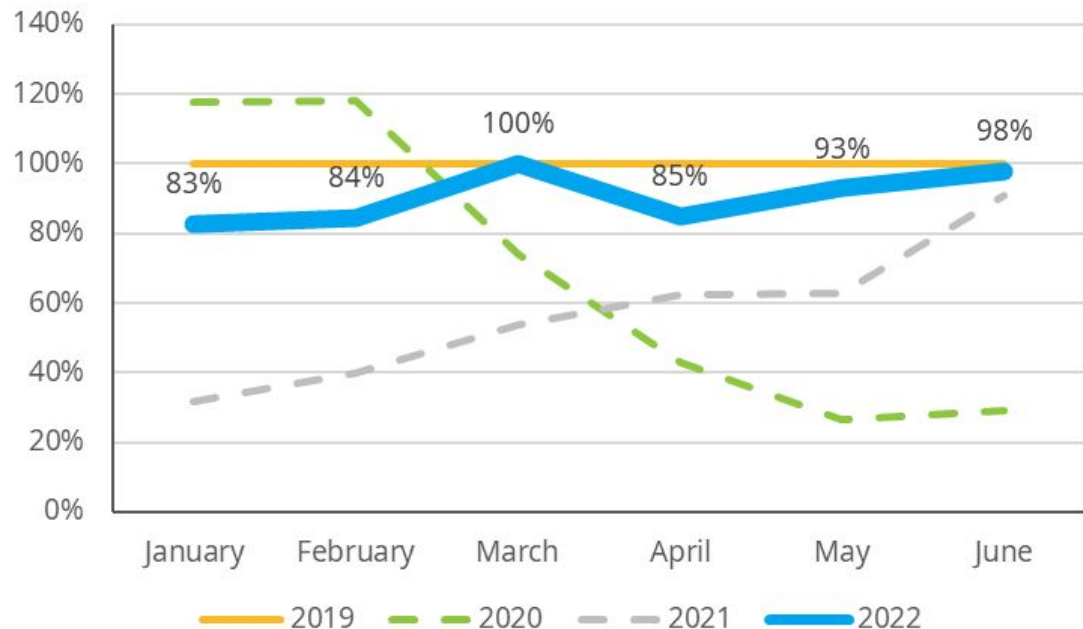
The number of leads in the second quarter of 2022 **is up 3% over the first quarter.**

The West/Pacific is steadily reaching 2019 levels in the total number of leads and is currently **up 59% over 2021.**

West/Pacific (43 destinations)

Number of leads through June 2022

Percentage of 2019 index

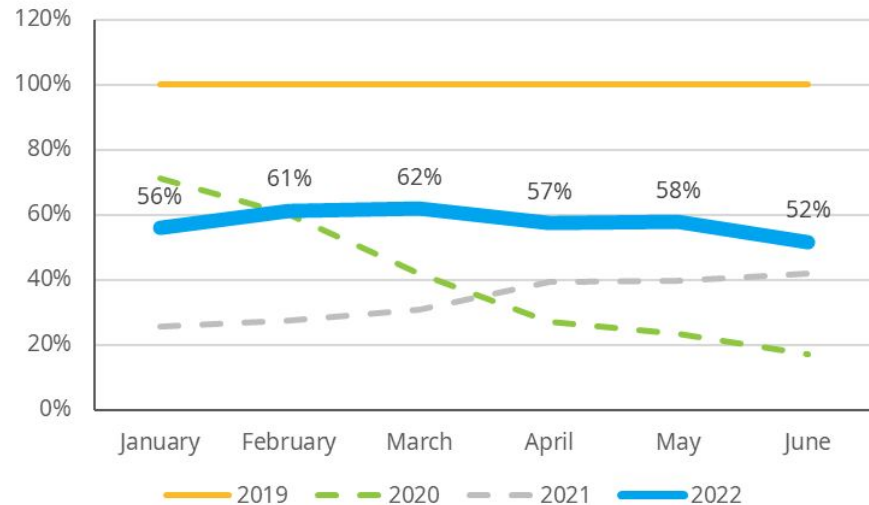


West/Pacific: number of booked events

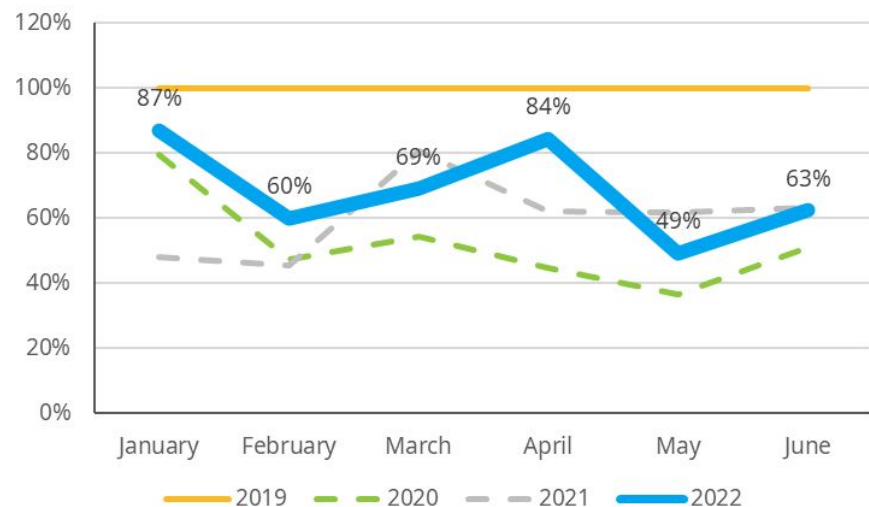
The number of booked hotel meetings is down 43% through June 2022 over 2019 and slightly down in the second quarter compared to the first.

Overall, the number of booked convention center events is down 33% from 2019 and are only **up 10% from 2021**.

Number of booked hotel meetings through June 2022
Percentage of 2019 index



Number of booked convention center events through June 2022
Percentage of 2019 index



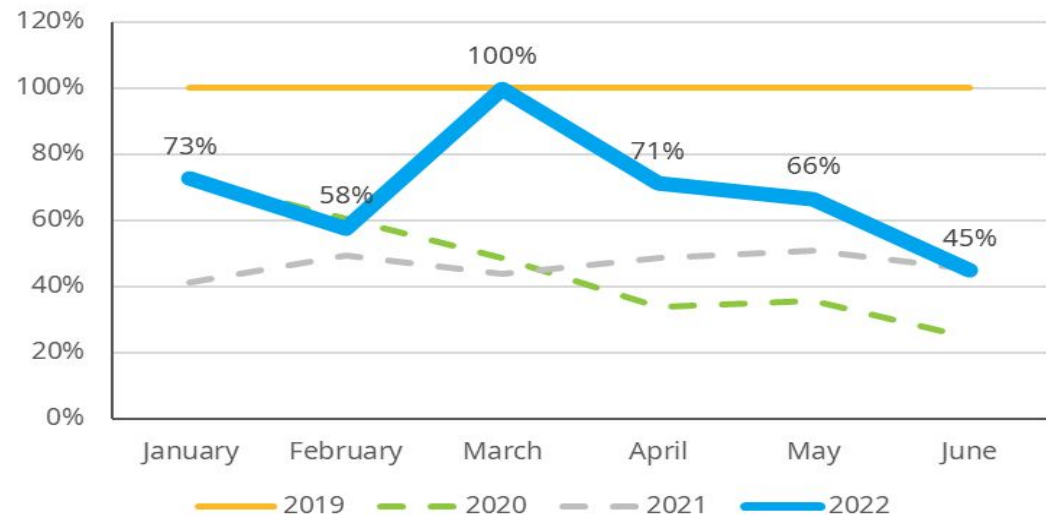
West/Pacific:

booked hotel meeting room nights & attendance

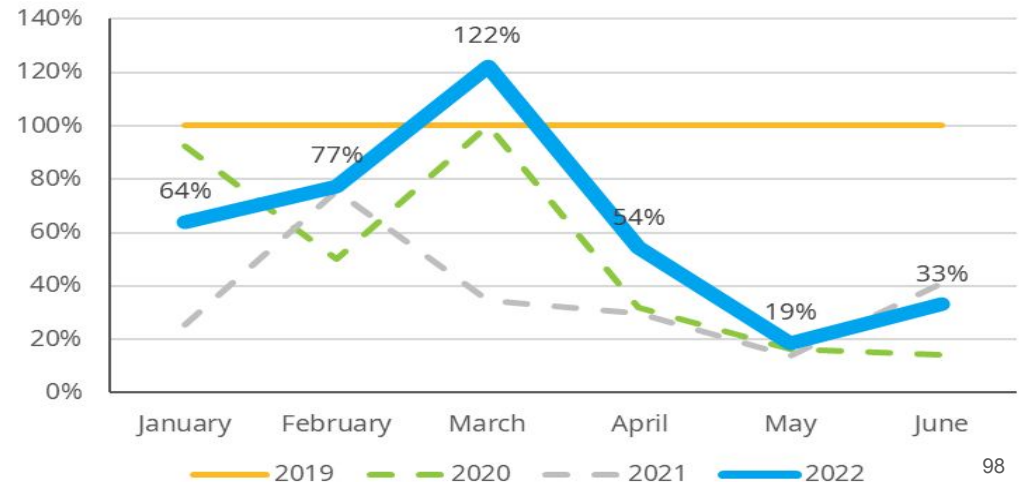
Booked hotel meeting room nights are down 32% through June 2022 compared to 2019 and down 11% in Q2 compared to Q1.

Booked hotel meeting attendance is down 47% from 2019 levels but up 65% from 2021.

Booked hotel meeting room nights through June 2022
Percentage of 2019 index



Booked hotel meeting attendance through June 2022
Percentage of 2019 index





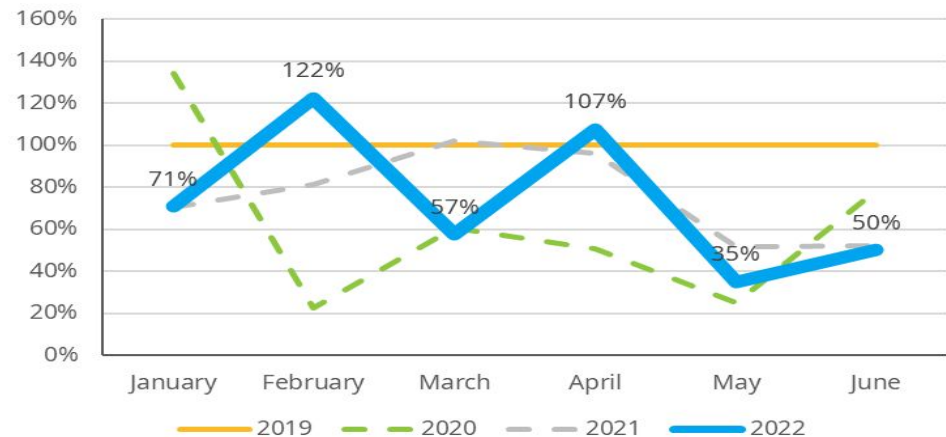
West/Pacific: booked convention center room nights & attendance

Booked convention center room nights through June 2022 are down 38% from 2019 and down 8% compared to 2021.

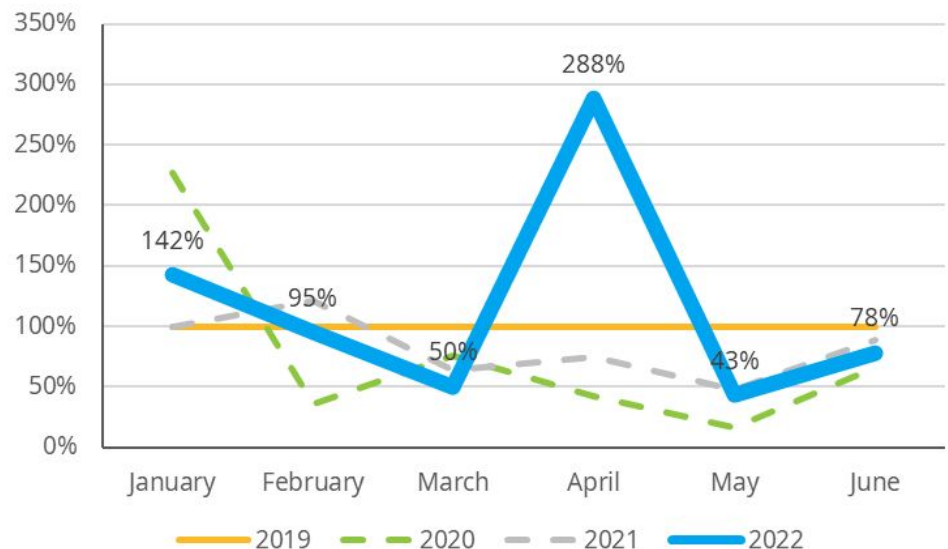
Booked convention center attendance is down 15% 2022 YTD compared to 2019 but up 135% in the second quarter compared with the first.

For booked convention center attendance, April 2022 saw several annuals turning definite for multiple years, creating the spike.

Booked convention center event room nights through June 2022
Percentage of 2019 index



Booked convention center event attendance through June 2022
Percentage of 2019 index



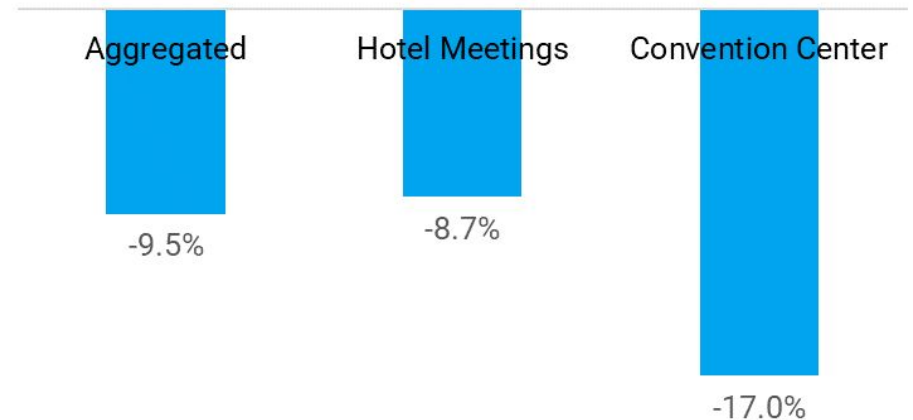
West/Pacific: lead volume & room nights

What does this **mean for you?**

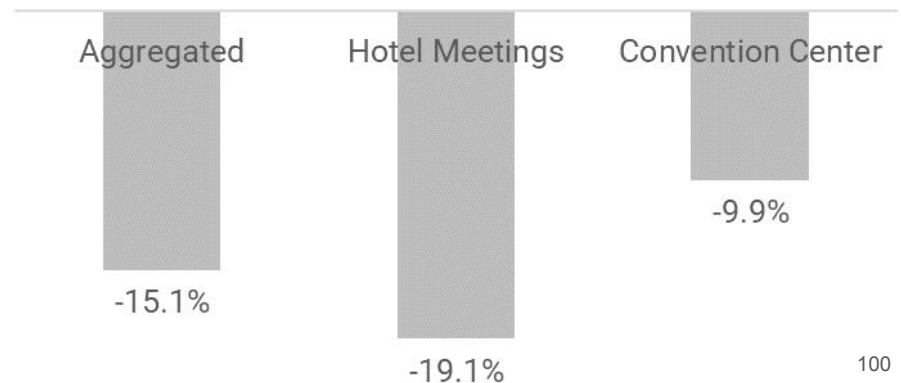
The number of leads in the DMO pipeline is down nearly 10% compared to 2019 and amounts to a variance of over 1,800 leads. The biggest contributor to this variance is hotel meetings leads, which are down by 8.7%.

The average peak room for hotel meetings decreased by 10% from 2019. Conversely, the average peak room for **convention center leads increased by over 13%.**

Number of leads through June 2022 compared to 2019



Lead room nights through June 2022 compared to 2019



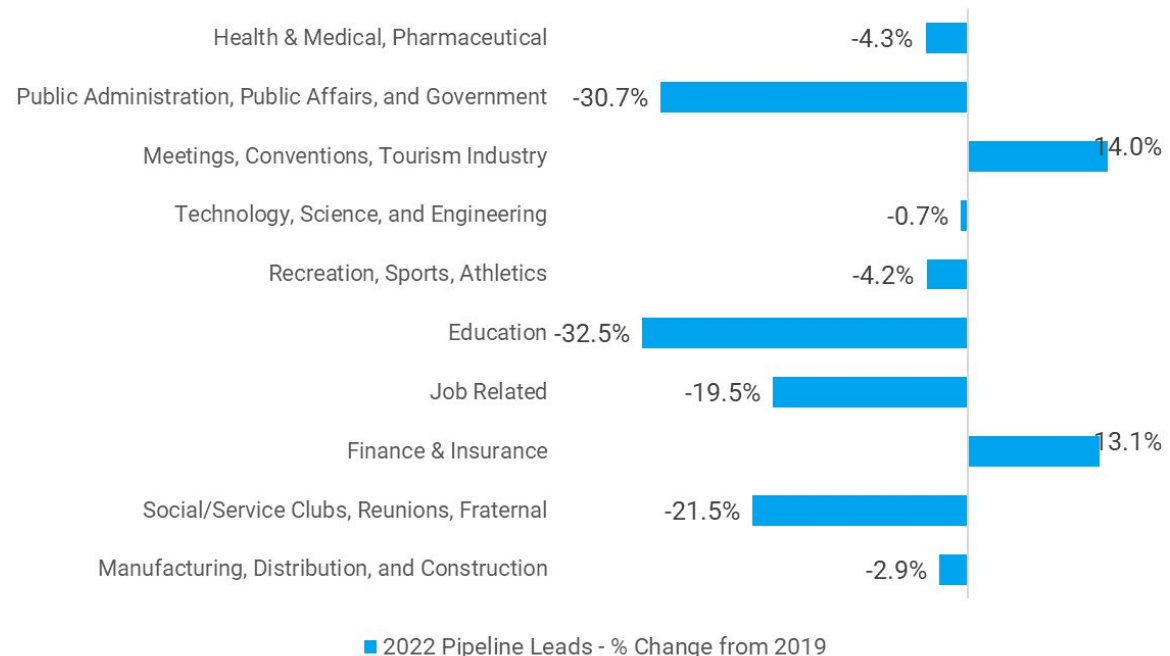
West/Pacific: market segmentation & hotel meeting leads

What does this **mean for you?**

The Top 10 highest market segments comprise 84% of 2019 leads that could be categorized in MINT+ key classifications.

The number one market segment for hotel meeting leads in the pipeline is Health & Medical, Pharmaceutical which **comprised 16% of 2019 bookings**. In 2022, this segment had 4.3% fewer hotel meeting leads.

Top 10 market segments: **number of hotel meeting leads** percentage variance comparing 2022 to 2019, through June



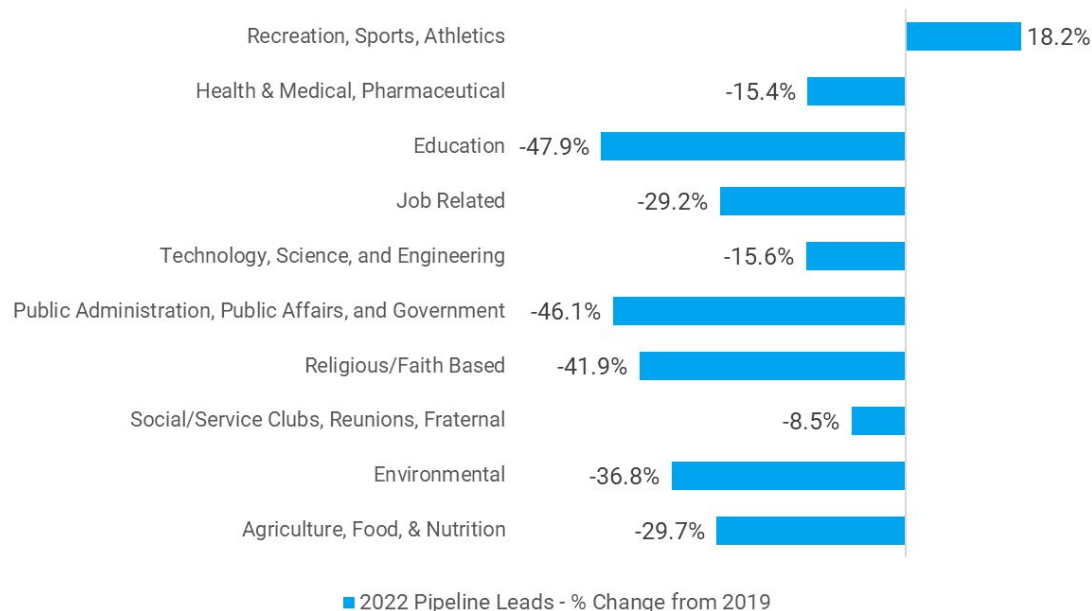
West/Pacific: market segmentation & convention center leads

The Top 10 market segments comprise **86% of 2019 leads** that could be categorized in MINT+ key classifications.

The number one market segment for convention center leads in the pipeline is Recreation, Sports, and Athletics, which comprised 16% of 2019 bookings. Through June 2022, there were **18.2% more convention center leads in this segment.**

A close second is the market segment of Health & Medical, Pharmaceutical, which comprised **15% of 2019 bookings.** Through June 2022, there were 15.4% fewer convention center leads in this segment.

Top 10 market segments: **number of convention center event leads** percentage variance comparing 2022 to 2019, through June





2 synergize

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SIMPLEVIEW SALES QUARTERLY | JULY 2022

About us



Meet Shimo

Christine “Shimo” Shimasaki is the managing director of 2Synergize, LLC, a Simpleview consulting company. **In this role, she sets Simpleview’s meetings strategy and helps destination marketing organizations (DMOs) and convention and visitor bureaus (CVBs) create competitive advantages in the meetings market.**

Since 2009, she has provided leadership and guidance to the CVB industry and has helped individual CVB sales organizations with specific meetings-market issues and opportunities.

In July 2022, she was recognized as a Hall of Fame Industry Contributor by Destinations International for her significant contributions to the creation, evolution, and advancement of the destination organization industry specifically and the travel and tourism industry in general.





Meet **Suzanne**

Suzanne Ravitz is the business analyst for 2Synergize, LLC, a Simpleview consulting company. **In her role, she develops primary and secondary market research studies, analyzes data, communicates recommendations, and serves as a client resource.**

She brings over twenty years of sales, analytics, marketing, and business development experience from the San Diego Tourism Authority, the San Diego Convention Center, and Destinations International. In her previous roles, she worked to create actionable strategies to drive visitor demand and group bookings.

About **2Synergize**

2Synergize, LLC is a Simpleview consulting company specializing in the convention and visitors (CVB) industry with a laser focus on helping destinations and partner organizations gain a competitive edge in the meetings and events market. We understand the complexities of the organization's roles and responsibilities and the importance of optimizing stakeholder relationships.



About Simpleview

Simpleview is a leading provider of CRM, CMS, website design, digital marketing services, and data insights for convention bureaus, venues, tourism boards, DMOs, and attractions. The company employs staff across the globe, serving clients of all sizes, including small towns, world capitals, top meeting destinations, and countries across multiple continents.

