MAXIMIZE ATTENDANCE

AN EXAMINATION OF THE BEHAVIORS BEHIND THE DECISION TO ATTEND

DECISION TO ATTEND — 2017

A COLLABORATIVE INITIATIVE

CONDUCTED BY: THE EXPERIENCE INSTITUTE
# Report Contents

## EXECUTIVE SUMMARY 3-15

- Introduction 4
- Acknowledgments 5
- Research Objective 6
- Foreword 7

## BEHAVIORAL PROFILE TEMPLATE 16-18

## BEST PRACTICES 19-23

## KEY FINDINGS 24-55

## APPENDIX 56-61

- Survey Segments 57-59
- Methodology 60
- Supporting Organizations 61

### KEY FINDINGS: Quick-Read Charts & Graphs 24-55

- **Propensity to Attend** 25-27 (By Generation, Frequency)
- **Attendance Drivers** 28-34 (Top 3 Drivers, Social Interactions, Local Websites)
- **Decision Process** 35-43 (Who Decides, When, Barriers, Staying Outside the Block)
- **Attendees as Consumers** 44-55 (Return, Recommend, Extended Stay, Expectations, Expertise)
Executive Summary

Second Survey
Decision to Attend 2: 2017

Total Responses: 8,992
Introduction

Attendees are consumers; discerning travelers who may choose to attend conventions & exhibitions — or not.

That’s why the mutual goal of both meeting/exhibition professionals and CVBs is generating positive word-of-mouth by attendees, resulting in repeat bookings and increased attendance.

This report provides insight from the second survey conducted in 2017, with comparisons to the 2014 results, including Key Findings.

As events and exhibitions are the largest group-based users of the destination experience, our organizations have joined together on this landmark research:

- Leading a sea-change toward defining the attendee as the ‘customer’
- Providing feedback to destination leaders to shape the overall experience
- Developing best practices and strategies to maximize attendance

The vision of this continuing research study is to develop new industry-wide strategies to MAXIMIZE ATTENDANCE — together.

We encourage your participation in this important vision!

Mickey
Mickey Schaefer, FASAE, CAE, CTA
CEO / Founder
The EXPERIENCE Institute®

Deborah
Deborah Sexton, FASAE
President & CEO
PCMA

David
David DuBois, CMP, CAE, FASAE, CTA
President and CEO
IAEE

John
John Graham, FASAE, CAE
President & CEO
ASAE

Paul
Paul Van Deventer
President & CEO
MPI

Don
Don Welsh
President & CEO
Destinations International
Acknowledgements

Organizations Surveyed — 8,992 Responses!
Special thanks to the following organizations who disseminated the Decision to Attend 2 survey.

AACC International ● American Phytopathological Society ● Association of Equipment Manufacturers
Americas Committee for Treatment and Research in Multiple Sclerosis ● Association of Rehabilitation Nurses
International Association of Administrative Professionals ● Master Brewers Association of the Americas
National Association of Neonatal Nurses ● National Frame Building Association
National Shooting Sports Foundation ● TESOL International Association ● Unitarian Universalist Association

Research Sponsors
Special thanks to the following destinations for their financial support, providing free access to the study’s tools and resources.

— Platinum Sponsors —

— Gold Sponsors —
Research Objective

2014 & 2017:
Over 16,000 Total Responses!

This *Decision to Attend Study* report is designed as a desktop reference and is the second in a series focusing on the myriad behavioral and societal factors comprising the reasons individuals decide to attend — or not attend — conventions & exhibitions.

It takes responses from 8,992 prospective or current attendees and establishes a baseline from which the industry will continually measure the influencers and barriers to attending. It also compares 2017 against the 7,171 responses in 2014; totaling over 16,000 responses!
EXECUTIVE SUMMARY

Foreword

As An Industry, We’re Often Guilty

We Need to Surgically Target Market Today’s Discerning Attendees

Every group is different. Every meeting is different. But one thing is certain, today’s attendees are discerning travelers with high expectations.

As an industry we’re often guilty of hitting the replay button, doing the same attendance promotion process over and over and hoping they will WANT to attend.

It’s a dance. Destinations work on their meeting facilities and overall destination product. Organizations focus on educational content and convention/expo ROI. What’s often missing is working strategically together to target market the behavioral nuances of each group.

This second survey within the Decision to Attend study reaffirms that prospective attendees have a high level of travel expertise, a high propensity to want to continue their education, a need to network with Others Like Me, and a desire to explore local destination experiences.

The challenge for meeting professionals and CVBs is getting them to YES — to make it so compelling from an education, networking, and destination experience standpoint that when they receive the meeting promotion, they will WANT to go.

These dynamics, and more, are what this Decision to Attend Study has revealed and what is outlined herein.
EXECUTIVE SUMMARY

Key Findings

SURVEY SEGMENTS

The study analyzes the 8,992 respondents across three segments: Generation, Propensity to Attend, and Attendance Frequency. The percentage of respondents for each segment is shown below (for details on segments and methodology see the full report Appendix).

— By Generation —

— By Propensity to Attend —

— By Attendance Frequency —

Moving Them Along the Frequency Continuum

The ultimate goal is to use this information to move attendees to a higher frequency of attendance — motivating the Nevers to Occasionals, the Occasionals to Frequent, and the Frequent to Always.

Nevers ➔ Occasionals ➔ Frequent ➔ Always

(Every 6-10 Years) (Every 2-5 Years)
Key Findings

ARE THEY ADULT LEARNERS?

The Propensity to Attend is High Across Generations
91% of all generations possess the will or strong propensity to continue their personal or professional education as adult learners, with both Gen Y Millennials and Gen Xers the highest at 95%.

There’s a Good Pipeline of Younger Attendees on the Horizon
With more entering the workforce, 43% of Gen Y Millennials reported they are attending MORE workshops, seminars, conferences, conventions, and exhibitions, rising from 37% in 2014.

Even the Nevers Want to Continue Their Education
70% of all respondents report attending More or About the Same number. This is holding steady, with the Always and Occasionals showing slight increases over 2014. It’s good news that continuing their education is important, even to those that never attend.

WHAT ARE THE DRIVERS?

The Top Drivers:
92%
Education
78%
Destination
76%
Networking

Top Three Drivers of the Decision to Attend
While percentages changed from 2014, the top three remain the same:

Education dropped from 95% to 92%.
Destination dropped from 82% to 78%
Networking rose from 75% to 76%.

The next page breaks it down.
EXECUTIVE SUMMARY

#1 Driver: Education

**Content Matters**
92% of all generations indicate that education is important, whether the education is gleaned from the formal program or the exhibit floor.

**Staying Abreast Matters**
67% indicate keeping up and staying abreast of their industry or profession is Very Important.

**Even Those Not Attending Say Education is Important**
70% of those not always attending say education is Very Important, contrasted to 55% of the Always, who are equally motivated by networking.

Education should always be a strong component of the promotional message, regardless of generation or attendance frequency.

#2 Driver: Destination

**Destination / Location is Significant**
78% of all generations report the destination factors into their decision, with 20-30% saying it’s the deciding factor — that it determines it. Write-in comments ran the gamut from destination appeal, to drivable distance, to airlift, to overall cost. Also mentioned was the importance of rotation and experiencing new places, which bodes well for 2nd and 3rd tier destinations.

**Destination / Location Impacts the Decision**
40% of the Occasional attendees indicate it’s significant for them and determines it, compared to 20% Frequent and 10% Always attendees. Don’t give up on the Occasionals, they can be convinced.

#3 Driver: Networking

**They Want Opportunities to Network Together, On-Site**
76% of all generations say it’s important to give them opportunities to network and make connections, with 49% of Gen Y Millennials rating it as Very Important, the highest of all generations. By attendance frequency, the Always attendees love networking, with 62% saying it’s Very Important, compared to 40% of the Frequent and 32% of the Occasional. Creating and promoting on-site opportunities may impact their decision to attend.

**Attendees Want to Socialize, Less So on Social Media**
42% of all respondents want to socialize via social media when attending, versus 74% who want to connect face-to-face. They want interactions that will help them build their professional network.

Promoting new things to see and do in the city/destination may tip the scale to YES. Remember, most are discerning. You need to entice them.

Use social media in creative ways. Fuel impromptu meet-ups on topics or special interests. Mine the thread for intel that may tell you more about the changing profile of your attendees.
EXECUTIVE SUMMARY

WHO DECIDES?

For Many, Someone Higher Up Decides

Who Makes the Decision

67% of all generations say it’s their decision. By generation, not surprisingly, 50% of Gen Y Millennials and 40% of Gen Xers need approval.

“My supervisors have never experienced the organization to understand the relevance in the industry.”

“Company won’t approve the cost. I don’t need convincing, they do.”

Top Barriers are Consistent

When asked what prevents them from attending more often, four categories emerge and are trending with 2014:

- Overall Costs / Budgets
- Timing Doesn’t Work / Getting Away
- Destination Appeal
- Getting Approval

Cost continues to be the biggest barrier, regardless of generation or attendance frequency, as expressed below:

“Charging exorbitant rates for hotels, etc., actually works against growing a customer base for such events.”

89% Would Attend More, if Barriers Were Removed

Surprisingly, only 11% said I’m Not That Interested in Attending, even if barriers of time and money were removed.

Impact of State/Local Laws

15% was the highest; 0% the lowest, when asked, I May Disagree With State & Local Laws, as a reason for not attending more frequently. With most attending for education, this is not surprising and, of course, varies by organizational purpose and mission.

WHAT ARE THE BARRIERS?

Barriers are Cost, Time, Destination & Approval

Offer ways to defray or delay costs, e.g. coupons, discount offers for food and transportation, and installment payments for registration.

Use a Justification Toolkit to help them get approval, including a sample letter to their supervisor and list of benefits to their organization.
WHAT’S THE TIMING?

Most Will Decide 2-6 Months Out

Most Register 2-6 Months Prior
56% of all respondents report they normally register 3-6 months prior, with an additional 26% 2 months prior, trending with 2014. Of course, registration timing can vary by group, type of event, and location.

Under 10% Less than 2 Months
7% reported doing so one month prior and 2% within 30 days, identical to 2014. For Gen Xers and Boomers, they are Evaluating Overall Costs and Waiting to See If I Can Get Away. For Gen Y Millennials and Gen Xers it was Don’t Get Around to it Sooner.

WILL THEY STAY IN THE BLOCK?

Most Will Stay In the Block, Hotel Cost is a Big Factor

Most Stay in the Official Block
82% of all respondents report they usually prefer to stay in the official hotel(s), with 44% Highly Likely and 38% Likely to do so. Generationally, 27% of Gen Y Millennials reported they would stay elsewhere, compared to 16-19% for the other generations. Although this is the average of nearly 9,000 responses and may vary by group/event, the 2014 and 2017 results are parallel.

Consider tying registration to housing, e.g. they can’t register unless they stay in the official block.

Why They’re Staying Elsewhere
Of the 18% staying outside the block, Gen Y Millennials are the most price sensitive. Cost is the main factor, with many responding Can Get a Better Rate on My Own. The top four reasons are:
Cost
Brand Loyalty
Hotel Location
Non-Hotel Environment

Trend your registration Half-Life; the half-way point from when promotion starts. Look at it by generation and attendance frequency, as well, to know when to make adjustments for current and future years.
EXECUTIVE SUMMARY

WILL THEY RETURN / RECOMMEND?

Return Intentions: Will Do So, if Destination Experience is Positive

85% are Likely to Repeat 
**Attendance** at the same event and 77% a different event, if the destination experience is positive.

79% are Likely to Return 
**for Leisure** if the destination experience is positive, even higher for 84% of Gen Y Millennials and 83% of Gen Xers. They attend on someone else’s dime and return on their own dime, which is significant.

Recommend Intentions

89% are Likely to Recommend the 
**Conv/Expo**, if the event met or exceeded their expectations, rising from 85% in 2014.

88% are Likely to Recommend the 
**Destination**, if the destination met or exceeded their expectations, climbing from 83% in 2014.

ARE ATTENDEES OF VALUE?

Attendee$ are Valuable to the Destination

**Attendees are Valuable Consumer$**
- 53% Likely to **Extend Their Stay**
- 55% Likely to **Turn Their Trip Into a Vacation**
- 49% Likely to **Bring Others With Them**
- 79% Likely to **Get Out & About**

Attendees fuel additional room nights and double (or triple) spending, trending with 2014. Combining business with leisure (Bleisure) is becoming the norm for many time-starved attendees. They’re in another city, why not take some extra time to explore? Of course, this varies by type of event and type of attendee.

From Agritourism, to Ecotourism, to Voluntourism, to the Sharing Economy, these trends are seeping into the fabric of our society and the makeup of today’s attendees.

It’s time for new metrics on the value of attendees — beyond *Heads in Beds*.

The sale isn’t made when the convention is booked.

The sale is made when the convention leaves.

It’s time for new thinking. For decades, our industry has viewed attendees as people who ‘come in and out’ of the destination for meetings, conventions, or exhibitions with success measured by final attendance, filling the block, and overall economic impact.

In today’s consumer-driven, discerning society, that model must evolve.

Copyright © 2017 The EXPERIENCE Institute®. Protected by laws of Copyright & Trademark. All rights reserved. Any adaptation of the survey results is prohibited without prior written permission of The EXPERIENCE Institute®. TheExperienceInstitute.org
EXECUTIVE SUMMARY

DOES THE DESTINATION EXPERIENCE MATTER?

Attendees Have High Expectations

Factors of Importance to Them
Remarkably, when asked to rate the importance of nine destination factors, the results were remarkably similar by generation and attendance frequency; combined Important and Very Important:

- 89% Transportation Options
- 89% Appears Safe
- 86% Appears Clean
- 86% Wayfinding / Ease of Getting Around
- 85% Welcoming, Friendly People
- 78% Service-Oriented Front-Line
- 75% Variety of Things to See & Do
- 69% Easy to Access Local Information
- 38% Easy to Voice Concern / Complaint

It Matters That the City is Working on the Experience

Improvements to the Experience
71% of all respondents report it’s important to them that the destination/city is working on making the overall destination experience more positive. This parallels the aforementioned 79% returning for leisure and 85% repeating attendance, if they have a positive destination experience.

Attendees Will Tell Others About Their Experience

Communicating Their Experience
90% report they will tell others (peers, friends, family, etc.) about a POSITIVE destination experience, with over half (51%) telling others about a NEGATIVE destination experience.

Thousands of attendees are talking to others.
What are they saying? Do you know?

Giving Feedback

Attendees Will Give Feedback, if It’s Quick & Easy
87% report they will give feedback on the convention/expo, and 81% on the destination, if it’s quick and easy to do so.

“This has made me think that if a city is undesirable, I should comment on a survey and voice my opinion.”
Moving Forward

Throughout 2017-18, the study will involve gathering and sharing best practices from both sides of the industry — meeting & exhibition professionals and CVBs / Suppliers — through chapters, presentations, articles, and webinars.

Today’s discerning attendees expect experiences. The goal is to work together to MAXIMIZE ATTENDANCE through a deeper understanding of the nuances of each event — the needs, attitudes and preferences of prospective attendees.

The new Behavioral Profile Template, developed by industry, is the first deliverable from this study. The template captures the most important influencers for each group, from which meeting & exhibition professionals and destination stakeholders can work together to target their attendance promotion strategies.

That’s the vision. We value your input and thank you for your involvement.
Targeted Marketing

BEHAVIORAL PROFILE TEMPLATE

Created by CVBs and Meeting/Expo Professionals

DECISION TO ATTEND STUDY
A Useful Tool
Developed by Industry

STEP 1: Use this Template as a conversation tool to identify the behavioral nuances of each Group.

STEP 2: Then, both the Group marketing team and CVB marketing team collaborate on targeted promotional messages to Maximize Attendance!

“We both loved the exercise. Some ‘aha’ moments come from it.”

“Often, planners and CVBs will hit the replay button. This review provided an in depth look of group/attendee needs to enhance the attendee experience.”

Questions? Feedback?
Kevin Kamenzind  ●  kkamenzind@cox.net  ●  602-738-8529
Mickey Schaefer  ●  mickey@theEXPERIENCEinstitute.org  ●  520-219-0469

For Up-to-date Information on the Decision to Attend Study go to:
TheExperienceInstitute.org

Copyright © 2017 The EXPERIENCE Institute®. Protected by laws of Copyright & Trademark. All rights reserved. Any adaptation of the survey results is prohibited without prior written permission of The EXPERIENCE Institute®. TheExperienceInstitute.org
INSTRUCTIONS  
Step One: Well before attendance promotion is underway, Client/Group and CVB Sales/Services meet together (by phone or in person) to work through this short template. Use the list as a strategic conversation tool. Circle 3-5 of the most prominent behavioral nuances. Work quickly through the list; don’t get hung up.  
Step Two: Get Client/Group and CVB Marketing teams together to target market promotional messages!

1. INDUSTRIES ATTENDING
   Circle Those in Attendance:
   Healthcare / Medical
   Science / Life Science
   Finance
   Energy
   Technology / Information
   Green / Environmental
   Agriculture / Agri-Science
   Engineering
   Education
   Shipping / Logistics
   Automotive
   Other

2. INTERNATIONAL
   Approx. % Int’l. Attendees:

3. PRICES / OVERALL COST
   Approx. % who may be price sensitive on lodging, food, transportation, or may pay their own way to the event?

4. GENDER
   Approx. mix of men / women?

5. AGES
   Approx. mix of Attendee ages?

6. EXTENDED STAY / BRINGING OTHERS
   Approx. % extending stay?
   Approx. % bringing others?

7. DESTINATION ELEMENTS
   Of the following, what could significantly impact attendance?
   A. Walkable
   B. Safety
   C. Service-Oriented People
   D. Unique Experiences No Other Destination Offers
   E. Free or Low Cost Local Transportation
   F. Environmentally-Friendly
   G. Other

8. ‘Out & About’ INTERESTS
   Overall, what’s the ‘make up’ of the group; which are strongest?
   A. Late Night Scene
      (Bars, Music, Gaming, Nightlife, etc.)
   B. Outdoor Activities
      (Run/Walk, Trails, Biking, Sports, etc.)
   C. Arts & History
      (Museums, Performing Arts, Galleries)
   D. Cultural Neighborhoods
      (Experience Culture, Food, etc.)
   E. Shopping
      (Malls; High-End, Outlets, Districts)
   F. Other

9. FOOD PREFERENCES
   Overall, what’s the ‘make up’ of the group; which are strongest?
   A. Eat vs. Dine
      (Fast Food, Bars & Grills, Cafeterias, Bistros, Fine Dining, Food Court, etc.)
   B. Specialty Food Preferences
      (Ethnic, Healthy, Gluten Free, etc.)
   C. Unique Food & Drink Options
      (Food Trucks, Craft Beer, Coffee Shops, Wineries, etc.)
   D. Other

10. DESTINATION SERVICES
    Of the following, which may help increase attendance?
    A. Defray Attendee Costs
       (Coupons, Passes, Subsidies)
    B. Face-to-Face Networking
       (Social Outings, Dine-a-Rounds, Organized Tours, Fellowship, etc.)
    C. Corporate Social Responsibility
       (Volunteering; Connecting to Local Organizations, etc.)
    D. Revenue-Generating Activities
       (Pre or Post Tours; Fundraising Auctions, etc.)
    E. Other
Industry Best Practices
MAXIMIZING ATTENDANCE

DEcISION TO ATTDEND STUDY

Are my numbers improving?

Can I do better?

Or is this as good as it’s going to get?

Connections & Revenue:
A Mutual Goal

Maximizing attendance fuels two goals shared by both sides of the industry — Connections and Revenue.

For exhibition organizers and meeting professionals, growing attendance helps more individuals connect with the host organization and its mission, while protecting and growing an important source of revenue.

For destinations, increasing attendance results in more people connecting to the destination experience — what makes it unique — and increased overall spending as attendees get ‘out and about’ and/or recommend the destination to others.

Thus, the impetus to work closely together to utilize every possible means to strategically maximize attendance.
INDUSTRY BEST PRACTICES

Incorporating Best Practices

Throughout this research study, many best practices have been shared from both sides of the industry, as shown herein. Use them to:

- Brainstorm with your team.
- Talk with others about what’s worked best for them.
- Submit your experience to help grow this repository via the DecisionToAttend.com survey tool

Best Practices: Brainstorming Checklist

TIME AND DATE PATTERN:

☐ “Timing doesn’t work for me.” Even if you’ve done it before, keep asking about their preferred time of year and days of the week pattern. Generations change. Preferences change. Don’t assume.

NEED APPROVAL TO ATTEND:

☐ “My company won’t approve the cost. I don’t need convincing, they do.” For 30% of Gen Y Millennials, someone higher up makes the decision. Find out what they need. Develop or strengthen your Justification Toolkit. Give them sample wording to convey the benefits to their organization.

NEED HELP WITH OVERALL COST:

☐ Some pay their own way. Trend this by generation and type of attendee.

☐ Think of ways to offer installment payments for the registration fee for younger attendees who are establishing their careers or others who are on limited budgets. They’ll appreciate and remember it.

☐ Coordinate coupons, discount offers for transportation, food, entertainment, etc. If they’re cost conscious, this may motivate them to attend, even if they don’t use them. Work with the local CVB for ideas on what’s worked well for similar groups/expos/events.
Brainstorming Checklist, Cont’d.

ALWAYS PROMOTE THE EDUCATIONAL VALUE:

☐ “I go to a convention to learn, not to play.” For many industries and professions, the annual event is one of the most effective ways for them to learn and stay abreast. Always promote education.

HELP THEM BUILD THEIR PROFESSIONAL NETWORK:

☐ Create ways for attendees, especially Gen Y Millennials, to build their professional network and make connections, both on-site and post-event. Networking is the #3 driver; promote connections.

FACILITATE THEIR LEARNING FROM EACH OTHER:

☐ For those who always attend, networking is their #1 driver over education and destination/location. Create ways to facilitate networking in environments conducive to 1:1 conversation.

☐ “I attend to be with people like me.” Develop ways for attendees to stay abreast of their industry by learning from their peers. Include this as a strong part of your promotional mix to lure the less frequent attendees.

TREND THE AGE OF YOUR ATTENDEES:

☐ What’s the age of your attendees? Are you replacing retirees? Trend any variations over time. Welcome the emerging attendees and thank the emeritus attendees; they’re all important.

IDENTIFY PERSONALITY TYPES & LEARNING PREFERENCES:

☐ Don’t just think generations, think personality type. Within every group there are introverts and extroverts. The introverts need the most care. Make a home for them within your meeting format, e.g. places they can escape from large crowds. And, ask how they like to learn, e.g. smaller workshops.

REINVENT YOUR ON-SITE SOCIAL MEDIA:

☐ This study showed that many attendees prefer to connect 1:1 to build their networks, rather than use social media on site. Always include social media at your meeting, but use it in creative ways, e.g. fuel a meet-up on topics, with speakers, or to discuss special interests.

MINE SOCIAL MEDIA FOR SMALL DATA:

☐ Think small data. Mine the social media thread for intel that may tell you more about the changing profile of your attendees. Are they coordinating informal networking? Are they getting out & about together? What are their professional or outside interests? Are they changing?
Brainstorming Checklist, Cont’d.

TREND YOUR REGISTRATION PATTERN:
☐ Trend your registration Half-Life; the half-way point from when promotion starts. Look at it by
generation and frequency, as well, to know when to make adjustments in promotion and marketing.

TIE REGISTRATION TO THE HOUSING BLOCK:
☐ Consider tying registration to housing, e.g. they can’t register unless they stay in the official block.
While this may not work for all groups, it’s been very effective for many.

PROTECT YOUR BLOCK FROM ROOM POACHERS:
Exhibitor lists are often easily found on the internet, fueling the rise of room block poachers posing as
official housing agents. In your advance communications, encourage your exhibitors and your board/
leadership to alert you if they sense foul play.

TRACK ATTENDANCE FREQUENCY:
☐ Categorize them by frequency of attendance. You got them there. Are they repeating?
☐ Are they ‘one and done’? Is your frequency improving? Remember, getting them to attend earlier in
their career is key.

PARTNER WITH THE LOCAL CVB FOR ATTENDANCE PROMOTION:
☐ Contact the local CVB well in advance to explore ways to target market to attendee interests.

The chosen destination has a tremendous influence on the
meeting experience and the perception of attendees. The
CVB/destination organization is the conduit to all the destination
has to offer in terms of meeting support and attendee experience
options. They aid your ability to enhance, impact and differentiate
your meeting, ultimately driving the desire to attend.

Reach out to the CVB to start the conversation! And, be sure to use
the new Behavioral Profile Template to start a dialogue between your
marketing team and theirs. After all, the mutual goal is to MAXIMIZE
ATTENDANCE!
Key Findings
The Breakdown
Quick-Read Charts & Graphs
I. PROPENSITY TO ATTEND AS ADULT LEARNERS

The Future of F2F is Strong

All Generations Possess a Propensity to Attend

The Propensity to Attend is High Across All Generations.

Overall, the will or Propensity to Attend continues to be high with the younger generations trending slightly higher — a good sign for the future of face-to-face / F2F meetings. In studying the behaviors of individuals, nine in ten (91%) of all respondents indicated they would be Likely or Highly Likely to attend conventions and exhibitions if the barriers of time and money were removed. Compared to 2014, Gen Y Millennials rose from 93% to 95% and Gen X from 94% to 95%. Boomers held steady, while Pre-Boomers, not surprisingly, dropped from 85% to 72%, with this generation now ≥72 years old.

Gen X & Y Are Highly Likely to Attend

As for those reporting they are Highly Likely to attend conventions & exhibitions, at 60% overall, the youngest generation rose higher. Compared to 2014, Pre Boomers being highly likely to attend fell from 40% to 30%; conversely, Gen Y Millennials rose from 65% to 67%. Both Gen Xers and Boomers held steady at 66% and 59%, respectively. Another good sign for the future.

Copyright © 2017 The EXPERIENCE Institute®. Protected by laws of Copyright & Trademark. All rights reserved. Any adaptation of the survey results is prohibited without prior written permission of The EXPERIENCE Institute®. TheExperienceInstitute.org
Continuing their Education is Important.

Another way of researching the Propensity to Attend is to look at the likelihood of individuals continuing their education as adult learners by attending workshops, seminars, conferences, conventions and exhibitions for their personal or professional learning. For ALL respondents, there is little change since 2014 with over two-thirds (70%) attending More or About the Same.

Younger Generations are Replacing Older Generations

While the Gen Xers and Boomers remained steady, there was significant movement in the youngest and oldest generations. Gen Y Millennials reported they were attending More, rising from 37% to 43%. Conversely, Pre Boomers report they are attending Fewer, rising from 51% to 60%.

There’s a good ‘pipeline’ of younger attendees who want to continue their education.
KEY FINDINGS

PROPENSITY TO ATTEND

Attendees as Adult Learners

The Propensity to Learn Impacts Attendance Frequency.
Still looking at the propensity to continue their personal or professional education, it is important to monitor those attending More or Fewer workshops, seminars, conferences, conventions and exhibitions.

A positive sign is the Always attendees reporting they are attending More, increasing from 27% to 32%. Interestingly, the Occasionals reported they are also attending More, rising from 15% to 19%.

A remarkable 60% of both the Nevers and Occasionals reflect a propensity to continue their education—a positive sign for the future.

Propensity to Continue their Education—By Attendance Frequency—

Increased Propensity

<table>
<thead>
<tr>
<th>Year</th>
<th>Nevers</th>
<th>Occasionals</th>
<th>Frequent</th>
<th>Always</th>
<th>ALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>21%</td>
<td>20%</td>
<td>15%</td>
<td>19%</td>
<td>24%</td>
</tr>
<tr>
<td>2017</td>
<td>20%</td>
<td>19%</td>
<td>24%</td>
<td>25%</td>
<td>27%</td>
</tr>
<tr>
<td>2014</td>
<td>42%</td>
<td>40%</td>
<td>41%</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>2017</td>
<td>42%</td>
<td>40%</td>
<td>41%</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>2014</td>
<td>37%</td>
<td>41%</td>
<td>28%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>2017</td>
<td>41%</td>
<td>40%</td>
<td>24%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>2014</td>
<td>32%</td>
<td>30%</td>
<td>32%</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>2017</td>
<td>28%</td>
<td>30%</td>
<td>32%</td>
<td>30%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Copyright © 2017 The EXPERIENCE Institute®. Protected by laws of Copyright & Trademark. All rights reserved. Any adaptation of the survey results is prohibited without prior written permission of The EXPERIENCE Institute®. TheExperienceInstitute.org
II. ATTENDANCE DRIVERS

The Top Three Drivers

#1 Education / Staying Abreast, 92%

#2 Destination / Location, 78%

#3 Networking, 76%

Education is King. Networking and Destination Holding in Top Three.

By Generation, these are the top three drivers, with slight variation from 2014:

Education / Staying Abreast of the Industry has remained at the top, dipping slightly from 95%.

Destination / Location held in the top three, moving from 82% to 78%.

Networking rose slightly from 75% to 76%.
Whether by generation or frequency, education is important.

ATTENDANCE DRIVER #1

Importance of Education (Program, Topics, Speakers, Exhibits)

--- By Generation ---

- **ALL**: 2% Most Important, 6% Very Important, 25% Important, 67% Not Important
- **Gen Y Millennials**: 2% Most Important, 7% Very Important, 26% Important, 66% Not Important
- **Gen Xers**: 1% Most Important, 6% Very Important, 25% Important, 68% Not Important
- **Boomers**: 1% Most Important, 5% Very Important, 23% Important, 69% Not Important
- **Pre Boomers**: 3% Most Important, 8% Very Important, 30% Important, 59% Not Important

Content Matters.

Education continues to be a primary driver and should remain a strong part of the attendance promotion message.

When thinking about the possible benefits of attending, a remarkable nine in ten (92%) of All respondents indicate education is *Important* or *Very Important* — across generations and attendance frequency. More strong numbers.

--- By Attendance Frequency ---

- **ALL**: 2% Most Important, 6% Very Important, 25% Important, 67% Not Important
- **Always**: 3% Most Important, 13% Very Important, 29% Important, 55% Not Important
- **Frequents**: 5% Most Important, 3% Very Important, 23% Important, 71% Not Important
- **Occasionals**: 1% Most Important, 3% Very Important, 21% Important, 73% Not Important
- **Nevers**: 2% Most Important, 4% Very Important, 25% Important, 69% Not Important

By attendance frequency (bottom chart), roughly 70% of attendees who don’t always attend rated education as *Very Important*. Note that the *Always* attendee rated education the lowest at 55% *Very Important*, as networking is a prime motivator for them. (see next pages).
**KEY FINDINGS**

**ATTENDANCE DRIVER #1**

Keeping Up and Staying Abreast of Their Profession / Industry

**Staying Abreast of Their Profession or Industry is a Key Motivator.**

Keeping up with and staying abreast of their profession or industry continues to be an important benefit to attending and matters to all generations combined at 91%.

Broken down, 2/3 of the three largest workforce categories are remarkably similar in their Very Important ratings.

“I want to be with people like me”, to learn from each other.

**By Generation**

- **ALL**
  - 3% Not Important
  - 5% Important
  - 25% Very Important
  - 67% Extremely Important

- **Gen Y Millennials**
  - 2% Not Important
  - 5% Important
  - 26% Very Important
  - 68% Extremely Important

- **Gen Xers**
  - 2% Not Important
  - 4% Important
  - 25% Very Important
  - 69% Extremely Important

- **Boomers**
  - 5% Not Important
  - 6% Important
  - 24% Very Important
  - 65% Extremely Important

- **Pre Boomers**
  - 25% Not Important
  - 15% Important
  - 29% Very Important
  - 30% Extremely Important

**By Attendance Frequency**

- **ALL**
  - 3% Not Important
  - 5% Important
  - 25% Very Important
  - 67% Extremely Important

- **Always**
  - 7% Not Important
  - 1% Important
  - 21% Very Important
  - 76% Extremely Important

- **Frequents**
  - 2% Not Important
  - 4% Important
  - 23% Very Important
  - 70% Extremely Important

- **Occasionals**
  - 7% Not Important
  - 8% Important
  - 27% Very Important
  - 58% Extremely Important

- **Nevers**
  - 10% Not Important
  - 9% Important
  - 26% Very Important
  - 52% Extremely Important

*Copyright © 2017 The EXPERIENCE Institute®. Protected by laws of Copyright & Trademark. All rights reserved. Any adaptation of the survey results is prohibited without prior written permission of The EXPERIENCE Institute®. TheExperiencelnstitute.org*
ATTENDANCE DRIVER #2

Importance of Destination / Location

The Destination / Location Impacts the Decision.

Three-quarters (78%) of prospective attendees report that the destination/location factors into their decision, down from 82% in 2014 (top chart). Write-in comments ran the gamut from destination appeal, to drivable distance, to airlift, to overall costs. Also mentioned was the importance of rotation and experiencing ‘new places’.

Generationally, roughly 20-30% say the destination is a significant factor in their decision and that it Determines It. Easy access to local information regarding planning what to do is Important / Very Important to 49% (not shown) of all generations and attendance frequencies.

In stark contrast (bottom chart), only 52% of Always attendees say location matters — they’ll attend wherever. This compares to a remarkable 90% of the Occasionals and 84% of Nevers who say the destination matters, trending with 2014. Knowing that the Occasionals and Nevers value education and networking (previous pages), the destination / location may be the impetus to encourage them to attend and should be prominent in overall attendance promotion. Converting them to a higher frequency of attendance is the goal.

For 78% of prospective attendees, the destination impacts their decision.
ATTENDANCE DRIVER #3

Opportunities for Networking & Making Connections

They Want Opportunities to Network On-Site

The opportunity for networking and making connections is important to over three-quarters (76%) of all respondents.

Significant changes occurred since 2014. Three generations reflected higher importance in the Very Important category, as follows:
- Gen Y Millennials - from 41% to 49%
- Gen Xers - from 40% to 43%
- Boomers - from 35% to 37%

As the Millennials age, building their network is increasingly important; another good sign for F2F meetings (top chart).

When analyzed by attendance frequency (bottom chart), the more frequent attendees rated networking higher, with the Always attendees spiking to 62% Very Important from 52% in 2014.

The Occasional also rose to 32% from 26% in 2014. The fact that it’s Important or Very Important to over two-thirds of all attendees warrants including networking in promotional messaging and determining how to best facilitate ‘getting them together’ on-site.
KEY FINDINGS

ATTENDANCE DRIVERS

Social Interactions

Opportunities for Social Interaction / Discussions Are Important to 74% of Attendees.
Beyond networking and making connections, 74% of *All* respondents consider the opportunity for social interaction and discussions an *Important / Very Important* benefit of attending, rising from 72% in 2014.

Although there was little variation between generations (not shown here), *Gen Y Millennials* rated social interaction higher in the *Very Important* category at 35%, compared to 28% by the other generations. By attendance frequency, the *Always* attendee rated it the highest at a combined 80% *Important / Very Important*. Even the *Occasionals* were high at 67%, trending with 2014 percentages.

Creating and *promoting* face-to-face / F2F interaction may tip the scale for some toward making the decision to attend.

Opportunities to Engage With Others via Social Media Are Less Important than F2F Interactions.
Surprisingly, opportunities to engage with others via social media at the event as a benefit of attending was again rated low at 13% *Very Important* and 29% *Important*, trending with 2014. Remarkably, there was also little variation by generation with only 16% of *Gen Y Millennials* rating it as *Very Important* and 27% *Important*.

While social media interaction will always be an important communication vehicle for attendees, they are clearly showing they prefer to talk and socialize with one another — face-to-face.

This has significant implications. Facilities and meeting professionals will need to stay ahead of this trend and monitor it over time.
KEY FINDINGS

ATTENDANCE DRIVERS

Searching Local Websites & Social Media

73% Will Search Local Websites to See What the Destination Offers.
Seven in ten (73%) of all respondents will search local websites to see what the destination offers, up from 70% in 2014.

Remarkably, there is little variation by generation, as shown above. There is also little variation by attendance frequency, with three-quarters (74%) of the Nevers, Occasionals and Frequentes saying they will search local websites. Even 67% of the Always attendees report they will do so.

What type of impression will they get when they search local websites? Will they easily find the information they are seeking? Both can influence their experience and overall image of the destination — and whether they decide to return to the convention/expo or destination, or not.

Social Media and Reviews Will Be Searched by 50% of Attendees.
They will access social media or travel review sites to see what others are saying about the overall destination experience. One-half (50%) of All respondents are Likely or Highly Likely to do so, with Gen Y Millennials in the lead at 57%, up slightly from 2014. There was little variation by attendance frequency.

In a separate question (not shown), attendees were asked whether they would monitor what other attendees were saying about the destination and things to do. Overall, more than one-third (38%) of All said they’d be Likely / Highly Likely to do so, with Gen Y Millennials the highest at 43%, down slightly from 2014.

These are important trends to monitor over time.
III. THE DECISION PROCESS

Who Makes the Decision

Getting Them to YES is Critical.

Is it their decision alone? For two-thirds (67%) of all respondents, the decision to attend is theirs to make, down from 73% in 2014. For the other 33% it’s their boss or ‘higher up’ who makes the decision. Yet when queried about barriers, interestingly, overall only 16% say they can’t get approval to attend.

Variances occurred within all three segments as shown above. Generational variances reflect a higher percentage of younger generation attendees needing approval. Half of Gen Y Millennials (50%) and 40% of Gen Xers don’t make the decision on their own, in contrast to over one-quarter of Boomers (27%) and only 3% of the mostly retired Pre Boomers.

By frequency, the Occasionals deciding on their own decreased to 71% from 80% in 2014, now trending closer with the other three attendance types.

Another surprise was the Propensity / Likelihood to Attend segment. A remarkable 91% of the Unlikelys make the decision themselves — higher than those who frequently attend, increasing from 85% in 2014. Other questions revealed the Unlikelys are more likely than others to use the convention / exhibition as a chance to ‘get away’, yet education and staying abreast of their industry is just as important to them as those who attend more frequently. This shows they may not be a lost cause — they just need to be convinced.
Remarkably, the timing of the decision to attend has changed little since 2014. Over half (56%) of All respondents report they normally complete the registration process 3-6 months prior (same as 2014), with an additional one-quarter (26%) deciding 2 months prior, down slightly from 28% in 2014. Under 10% decide less than 2 months out, with 7% doing so one month prior and 2% within 30 days, identical to 2014.

Not surprisingly, the more frequent attendees registered earliest at 3-6 months out, with over half (57%) of the Always attendees and 60% of the Frequents doing so, with a range of 20% to 27% registering within 2 months. Comments indicated that many register early in order to get in the official hotel(s), which parallels their desire for networking opportunities and social interaction.

Although there are not significant variances by generation, the Gen Xers register slightly earlier than the other generations, with write-in comments mentioning it takes a lot of pre-planning to juggle family obligations.

Numerous write-in comments mentioned the need for easy access to and reminders of future dates and locations — even several years ahead — to allow time to get it into their budgets and/or obtain approval to attend. One commented, “How can I budget for it, if I can’t find future convention dates on the website?”
**KEY FINDINGS**

**It’s important to trend why they register less than 60 days out.**

**THE DECISION PROCESS**

**Less Than 60 Days Out**

**Trending the Decision Timing: Less than 60 Days Out**

Of the 9% of respondents indicating they register less than 60 days out, it’s important to know why in order to track behavioral and generational trends.

To uncover the reasons, eight ‘Select All That Apply’ factors were evaluated. Of these, three of the factors turned out to be cross-generational, as follows:

- **Don’t Get Around to it Sooner**
- **Waiting to See If I Can Get Away**
- **Evaluating Overall Costs**

The outliers (small circles) were **Gen Y Millennials** who report they were **Waiting for Approval**, as most are now in the workforce. And, 30% of **Boomers** reporting they were **Reviewing Lodging Options**.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Gen Y Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Pre Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t Get Around to It Sooner</td>
<td>51%</td>
<td>38%</td>
<td>40%</td>
<td>23%</td>
</tr>
<tr>
<td>Waiting: Can I Get Away?</td>
<td>54%</td>
<td>54%</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>Waiting for Approval</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Want to Go to That Dest / City?</td>
<td>23%</td>
<td>24%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>Planning Things to Do Pre/During/Post</td>
<td>11%</td>
<td>7%</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Evaluating Overall Costs</td>
<td>21%</td>
<td>17%</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Reviewing Lodging Options</td>
<td>47%</td>
<td>42%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Other</td>
<td>36%</td>
<td>33%</td>
<td>36%</td>
<td>36%</td>
</tr>
</tbody>
</table>
Many Will Attend, Eventually.

Not everyone responding to the survey are attendees. Over one-quarter (29%) report they have never attended their organization’s largest convention / exhibition, trending with 2014.

For those who do attend, the three working generations are remarkably similar when the Frequent and Always attendee numbers are combined. The younger generations attend at a slightly higher frequency: Gen Y Millennials at a combined 54%, Gen Xers 53%, and Boomers 47%.

Generationally, the Occasionally Attend percentage increases over time, suggesting that roughly two in ten will ‘try it’ at some point.

Helping the younger generations attend earlier in their career may be the key to elevating them to a higher attendance frequency. For them, the overriding barrier is cost, with some indicating they are paying their own way. Write-in comments suggested installment payments for the registration fee, low-cost housing options, and airport transportation. Assisting these eager attendees early in their careers may pay off handsomely in the future. The willingness is there. Collectively, we need to both convince them and help them.

It’s bridging the gap between the desire to attend and the ability to attend.
KEY FINDINGS

THE DECISION PROCESS

Would They Attend More Often

<table>
<thead>
<tr>
<th>By Generation</th>
<th>Baseline</th>
<th>By Propensity to Attend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Y Millennials</td>
<td>76%</td>
<td>53%</td>
</tr>
<tr>
<td>Gen Xers</td>
<td>72%</td>
<td>29%</td>
</tr>
<tr>
<td>Boomers</td>
<td>66%</td>
<td>18%</td>
</tr>
<tr>
<td>Pre Boomers</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>ALL</td>
<td>66%</td>
<td>28%</td>
</tr>
</tbody>
</table>

There is Strong Desire to Attend More Frequently.

A remarkable nine in ten (94%) desire to attend more frequently. Respondents were asked, “If circumstances allowed, would you attend more often?” In looking at the baseline of All respondents, two-thirds (66%) said Yes, with another 28% saying Possibly, trending with 2014. Again, this bodes well for the future of face-to-face / F2F meetings.

Generationally, the Yes responses increase with each succeeding working generation, from Boomers at 65% to Gen Y Millennials at 76%. Combining the Possibly responses, this grows to a remarkable 93% to 98%.

By Propensity to Attend, it is interesting that 53% of the Highly Unlikelys report they would like to attend more frequently. Surprisingly, the Unlikelys rate Possibly at 51%, higher than the Likelys at 45%.

Overall, 66% said YES they would attend more often with Gen Y even higher at 76%.
KEY FINDINGS

THE DECISION PROCESS

Barriers to Attending More Often

Overall Costs Are Big Factor
Budget: Limited # They Can Attend
Difficult to Get Away
Timing Doesn’t Work for Me
Destination Doesn’t Appeal to Me
Can’t Get Approval
Other
Attend Other Conv / Expo
Not Interested in Attending
State or Local Laws or Legislation
Education Doesn’t Meet Needs
Trade Off With Co-Workers
Prefer Smaller Educ. Environment
Facility Doesn’t Appeal to Me
Don’t Like to Travel

Barriers are Cost, Time, Destination, and Getting Approval.

When asked to select the barriers that prevent them from attending more often, respondents reported the same six barriers that topped the 2014 list. For 2017, the top three barriers for All respondents are: Cost, Budgets, and Getting Away. While there may be little that can be done in the area of Time and Getting Away, it’s important to create incentives, experiences, and targeted messaging that will address the barriers of Cost (57%) and Budgets (49%). Surprisingly, only 11% said they were ‘Not That Interested in Attending’. And, only 7% selected I May Disagree with Local/State Legislation or Laws, a new question added since 2014, due to ‘hot button’ legislation impact.

COST / BUDGET: For nearly six in ten (57%) of All respondents, the Overall Costs of attending is rated as the highest barrier, regardless of generation or attendance frequency. Comments reflected high and rising hotel rates and high registration fees. In looking at Budget Limited on Number Can Attend, 61% of Gen Y Millennials (not shown) spiked higher than the 49% All.

TIME: Over one-third (37%) of All respondents indicated It’s Generally Difficult to Get Away, increasing from 34% of Boomers to 46% of Gen Y Millennials (not shown). Over one-quarter (27%) of All respondents indicated The Timing Doesn’t Work For Me.

DESTINATION / CITY APPEAL: Beyond cost and time, the destination / city appeal is the third highest barrier at 17%. Write-in comments ran the gamut, including travel distance (driving or flying), the number of ‘plane rides’ to get there, and overall travel costs.

CONVENTION / EXHIBITION: Meeting professionals were curious about other potential barriers. Shown under the dividing line above, these suspected barriers also ranked low for all respondents in 2014.
KEY FINDINGS

Less than 10% said ‘Nothing’ when asked what could convince them to attend.

THE DECISION PROCESS

Convincing Them

Defrayed Costs and Destination Appeal May Convince Them.

In a follow-up question, those who don’t Always attend were asked to select what would help convince them. Remarkably, less than one in ten (8%) of All respondents said ‘Nothing’. What will convince them? Cost and destination rated highest. Let’s break it down:

Focusing first on cost, six in ten (59%) of All respondents want some type of ‘Discount / Subsidy to Defray Costs’, identical to 2014, with two-thirds (67%) of Gen Y Millennials rating this highest. One quarter (24%) of All respondents want ‘On-Site Coupons / Discounts’, rising to over one-third (36%) for Gen Y Millennials. With regard to destination, ‘It’s a Destination / City I Want to Visit’ was the second highest factor for nearly one-third (35%), rising to 45% of Pre Boomers. As for education and networking, responses for ‘Better Educational or Networking Opportunities’ reflected less than one-quarter (20%). Regarding the perception of the destination — something the industry has been watching closely — ‘It’s a Destination / City I Can Get Approval to Attend’ surprisingly ranked low at 10% overall. With regard to convincing the decision maker, 20% Gen Xers and 27% of Gen Y Millennials said they needed ‘Materials to Help Convince My Superiors I Need to Attend’.

Copyright © 2017 The EXPERIENCE Institute®. Protected by laws of Copyright & Trademark. All rights reserved. Any adaptation of the survey results is prohibited without prior written permission of The EXPERIENCE Institute®. TheExperienceInstitute.org
KEY FINDINGS

THE DECISION PROCESS

18% Likely to Stay Outside the Official Block

Why They Stay Outside the Block is Important to Trend Over Time.

Eight in ten (82%) report ‘I Usually Prefer to Stay in the Official Hotel(s)’, with 44% Highly Likely and 38% Likely to do so, trending closely with 2014. Of the remaining 18% who are unlikely to stay in the block, seven in ten indicate they’ve always stayed elsewhere, with three in ten reporting they used to stay in the block, but no longer do so. When asked if they would change their minds if they knew the host organization could incur penalties, three in ten said they’d be more inclined to book the official hotel(s), up slightly from 2014, but the remaining would still book elsewhere.

Generationally, over one-quarter (27%) of the Gen Y Millennials reported they were Highly Unlikely/Unlikely to stay in the block, compared to 16-19% for the other generations.

By frequency of attendance, there were no significant variables but two in ten of the loyal Always attendees report they’ll stay elsewhere. For the overall 82% that prefer to stay in the block, the majority of write-in comments report they do so for convenience and networking.

IT VARIES BY GROUP: The above reflects the overall percentages for the 8,992 respondents from the twelve organizations. However, there is significant variation by individual group, ranging anywhere from 53% to 97% being Likely or Highly Likely to stay in the block. Once again, this shows the significance of each organization trending its own, unique data.
**THE DECISION PROCESS**

**Reasons for Booking Outside the Block**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Gen Y Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Pre Boomers</th>
<th>ALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can Get Better Rate on Own</td>
<td>22%</td>
<td>19%</td>
<td>22%</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Loyal to Hotel Brand(s)</td>
<td>21%</td>
<td>13%</td>
<td>20%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Want to Be in Area I Prefer</td>
<td>21%</td>
<td>19%</td>
<td>22%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Prefer a Non-Hotel Environment</td>
<td>29%</td>
<td>24%</td>
<td>28%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>15%</td>
<td>13%</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Reasons Are Varied, But Consistent.**

What are the reasons? For the roughly 20% reporting they stay outside the block, cost is the highest-rated reason, broken down as follows:

**COST:** Two-thirds (67%) responded, *I Think I Can Get a Better Rate on My Own, Even if I Have to Take a Cab or Public Transportation*. All generations were similar, except **Gen Y Millennials** reflect being far more price sensitive at 78% vs. **ALL** at 67%.

**BRAND LOYALTY:** Overall, 19% reported, *I’m Loyal to Hotel Brand(s)*, with **Gen Y Millennials** even lower at 16%.

**LOCATION:** Nearly one-quarter (22%) reported, *I Want to be in an Area I Prefer*.

**NON-HOTEL ENVIRONMENT:** And nearly one-quarter (23%) selected, *I Prefer a Non-Hotel Environment, e.g. condo, house, B&B, etc.*

Trending this over time will be very important, especially given the proliferation of Internet hotel sites and the shared economy entrepreneurs who want to capitalize on the group market.
KEY FINDINGS

DECISION TO ATTEND STUDY

Every person attending is a potential repeat attendee or repeat visitor.

IV. ATTENDEES AS CONSUMERS

Return Intentions: Repeat Attendance / Repeat Visits

They attend on someone else’s dime and return on their own dime, which is significant.

The Destination Experience Impacts Repeat Attendance.
Every person attending is a potential repeat attendee. If the overall destination experience is POSITIVE, 85% of respondents are Likely / Highly Likely to return to attend the same event at that destination, trending with 2014. If the experience is NEGATIVE, only 14% will return. And, over three-quarters (77%) are likely to return to attend a different event, with only 13% returning if the destination experience is negative. While there are slight generational and attendance frequency variances, it is clear that the overall destination experience ‘outside the walls’ matters and can definitely impact the destination’s annual attendance figures.

The Destination Experience Fuels Repeat Visits.
The overall destination experience also fuels repeat visits. The above percentages are from questions that queried the impact of a positive or negative destination experience. If the destination experience is POSITIVE, over three-quarters (79%) of attendees will consider returning for leisure travel. If the experience is NEGATIVE, only 5% are likely to return. By generation, 84% of Gen Y Millennials and 83% of Gen Xers would return, followed by 77% of Boomers. This underscores the need to value attendees as important visitors and view them with a ‘leisure traveler’ lens.
KEY FINDINGS

Attendees will recommend the convention / exhibition and the destination, or not.

ATTENDEES AS CONSUMER$ Recommend Intentions

![Graph showing recommend intentions]

If it Met or Exceeded Their Expectations, Attendees Will Recommend the CONVENTION / EXHIBITION.

Measuring the intent to recommend is critical. If a CONVENTION / EXHIBITION met or exceeded expectations, a remarkable 89% of respondents are Likely / Very Likely to recommend it to others, rising from 85% in 2014; with no marked variances between generations or attendance frequency. When broken down, 31% are Likely, with 68% Very Likely to recommend.

If it Met or Exceeded Their Expectations, Attendees Will Recommend the DESTINATION.

Similarly, if a DESTINATION / CITY met or exceeded expectations, 88% reported they are Likely / Very Likely to recommend the destination to others, rising from 83% in 2014, with similar percentages across generations and frequency of attendance. Broken down, 30% are Likely, with 70% Very Likely to recommend the destination to others.

Recommendations from attendees are golden in today’s consumer-driven society — reinforcing that the sale isn’t made when the convention is booked. The sale is made when the convention leaves.
KEY FINDINGS

ATTENDEES AS CONSUMER$ 

Attendees turn into leisure travelers. They are likely to extend their stay, turn it into a vacation, and bring others.

Extended Stays / Bringing Others

<table>
<thead>
<tr>
<th>Action</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extend the Stay</td>
<td>53%</td>
</tr>
<tr>
<td>Turn Trip Into Vacation</td>
<td>55%</td>
</tr>
<tr>
<td>Bring Others</td>
<td>49%</td>
</tr>
</tbody>
</table>

Attendees Likely to Extend Their Stay.
Over half (53%) of All respondents indicate they would be Likely / Highly Likely to extend their stay, slightly higher than 50% in 2014.

Attendees Likely to Turn Their Trip Into a Vacation.
Pre or Post-Vacation: Over half (55%) say they would be Likely / Highly Likely to turn the trip into a vacation, before or after the convention / exhibition, up slightly from 52% in 2014.

Attendees Likely to Bring Others With Them.
Nearly half (49%) report they would be Likely / Highly Likely to bring someone with them — friend, family or companion, trending steady with 2014.

Attendees are likely to turn into leisure travelers with over half indicating they will extend their stay, turn their trip into a vacation and bring someone with them. Remarkably, there is no significant variation between attendance frequency and generation. This shows that today’s attendees are consumers and should be valued in a new light, because they’re fueling additional room nights and doubling (or tripling) spending. The ‘peak night’ room block metric needs to evolve — beyond ‘heads in beds’ — to a new metric that values this dynamic.

Today’s attendees are consumers and should be valued in a new light.

It’s time for new metrics on the value of attendees — beyond ‘heads in beds’.
Attendees get ‘out & about’. They consume the destination ‘product’.

Attendees Are Likely to Get ‘Out & About’.

Over three quarters (79%) of All respondents are Likely or Highly Likely to get ‘Out & About’ during the convention / exhibition, higher than 76% in 2014. Although there is no significant variance by frequency of attendance, there is by generation with 51% of Gen Y Millennials the most Highly Likely to venture out. When combining Likely and Highly Likely responses, Gen Y Millennials again lead with 83%, followed by Gen Xers and Boomers at 79% and Pre-Boomers at 69%.

Attendees will grow the visitor spend. They will ‘consume’ the destination ‘product’, forming opinions on both the convention / exhibition experience, and the destination experience.
Attendees have high expectations about the destination experience.

**Destination Experience Expectations**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Important</th>
<th>Very Important</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation Options</td>
<td>40%</td>
<td>49%</td>
<td>89%</td>
</tr>
<tr>
<td>Appears Safe</td>
<td>34%</td>
<td>55%</td>
<td>89%</td>
</tr>
<tr>
<td>Appears Clean</td>
<td>41%</td>
<td>45%</td>
<td>86%</td>
</tr>
<tr>
<td>Way-Finding / Ease</td>
<td>44%</td>
<td>41%</td>
<td>86%</td>
</tr>
<tr>
<td>Welcoming / Friendly</td>
<td>44%</td>
<td>41%</td>
<td>85%</td>
</tr>
<tr>
<td>Service-Oriented</td>
<td>46%</td>
<td>32%</td>
<td>78%</td>
</tr>
<tr>
<td>Variety of Things to See &amp; Do</td>
<td>46%</td>
<td>29%</td>
<td>75%</td>
</tr>
<tr>
<td>Easy Access to Local Info</td>
<td>44%</td>
<td>25%</td>
<td>69%</td>
</tr>
<tr>
<td>Voice Concern / Complaint</td>
<td>27%</td>
<td>11%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Attendees and prospective attendees were asked to think about the destination / city experience and rate the level of importance of the nine factors above. Eight of the nine factors were ranked as *Important* and *Very Important* by over two-thirds of the respondents, trending with 2014.

In isolating only the *Very Important* ratings, *Appears Safe* was the highest at 55%, followed by *Transportation Options* at 49%, both up slightly from 2014.

Surprisingly, there was little variation by attendance frequency and generation. Numerous write-in comments reinforced the importance of these factors in the decision to attend.
KEY FINDINGS

ATTENDEES AS CONSUMER$©

Communicating Their Experiences

Thousands of attendees are talking to others.

What are they saying?

Do you know?

What actions are being taken destination-wide to address the negatives for future attendees?

Attendees Tell Others About Their Positive or Negative Experience.

It’s what attendees think and say to others that matters. And, they will tell others. Nine in ten (90%) reported they will tell others (peers, friends, family, etc.) about a POSITIVE destination experience, with over half (51%) telling others of a NEGATIVE destination experience, trending with 2014. There were no significant variances by generation or attendance frequency.

Bottom line, thousands of attendees are spreading positive or negative word-of-mouth — year-over-year. What are they saying? Do you know? More importantly, what actions are being taken destination-wide to address ‘the negatives’ for future attendees?
ATTENDEES AS CONSUMER$®

How Attendees Will Tell Others Varies by Generation.

How attendees tell others about their positive or negative CONVENTION / EXHIBITION experience or DESTINATION experience is important to trend over time.

When asked to select their preferred methods of communication there was little variance by attendance frequency. However, generationally, all four selected the same top five as their preferred method of communication averaging as follows:

1. Face-to-Face Conversation 94%, trending with 2014
2. E-mail 63%, down from 69%
3. Facebook 49%, up from 45%, ahead of Twitter 8% and LinkedIn 10%
4. Text at 41%, up from 30%
5. Phone Call 37%, trending with 2014

Interestingly, the most marked changes from 2014 were among the Gen Y Millennials, with Facebook decreasing from 61% to 55% and Text reaching a high of 55%, up from 45%.
ATTENDEES AS CONSUMERS$ Giving Feedback on Satisfaction

Attendants Will Give Feedback on Both the Convention / Exhibition Experience and the Destination Experience, if it’s Quick & Easy.

Obtaining ongoing satisfaction feedback is critical to establishing future strategies for both the convention / exhibition and the destination. Yet, it remains elusive for many.

When queried if they would give feedback if it were quick and easy to do so, the respondents were very positive, with little variance by attendance frequency or generation. The numbers have trended the same with 2014, as follows:

**CONVENTION / EXHIBITION EXPERIENCE:** Eight in ten (87%) are likely to provide feedback on their satisfaction with the convention / exhibition experience, with 47% Highly Likely.

**DESTINATION EXPERIENCE:** Similarly, eight in ten (81%) reported their likelihood to give feedback on satisfaction with the destination experience, with 43% Highly Likely.

Determining the best method to capture this satisfaction feedback consistently and strategically is critical to ascertaining what attendees are saying about their experience.
Meetings Matter to Attendees.

ATTENDEES AS CONSUMER$  Attendees Care and Want to Be Acknowledged

Knew We Were in Town  Cared We Were in Town  Improving Experiences

52%  58%  71%

Appeared City Knew About Our Group and Who We Were  Appeared City Cared Our Group Was Meeting There  City is Working to Make Destination Experience More Positive for Visitors

Over half (52%) of All respondents indicate it is Very Important / Important to them that the destination / city knew about their group and who they were.

Nearly six in ten (58%) of All respondents indicate it is Very Important / Important to them that the destination cared the group met there.

Over seven in ten (71%) of All respondents indicate it is Very Important / Important that the destination leaders are working to make the experience more positive.

Meetings Matter to Destinations and Attendees.

When a group meets at a destination / city, it leaves behind a solid economic impact. Both the CVB and the meeting / expo professional knows that but does it matter to attendees? It does, as is evidenced by the combined Very Important and Important responses above that parallel the 2014 percentages.

Something as simple as an opening-session welcome from a city official can go a long way in recognizing the group for selecting the city, thanking them for attending, and informing them of what the city is doing to make the experience more positive in the future for visitors.

This parallels the aforementioned finding that if the overall destination / experience is positive, 79% will be likely to consider returning for leisure and 85% are likely to repeat attendance in that destination / city. In short, meetings matter.
Today’s Attendees Have a High Propensity to Travel.

Overall, the Propensity to Travel is very high among the respondents. When asked how many trips they would take per year for leisure travel, if time and money were no object, over eight in ten (84%) reported they’d take 2-4+ trips, down slightly from 87% in 2014.

By generation, 52% of Gen Y Millennials preferred to take four or more trips per year (down from 55% in 2014), compared to 44% Gen Xers and 39% Boomers. Overall, the three working generations are trending strong.

The data clearly show that a propensity to travel is not a barrier to the decision to attend. However, more research is needed in this area.
Today’s attendees have a significant level of travel expertise. Still, some need help.

ATTENDEES AS CONSUMER$:

Travel Expertise Impact on Attendance

Attendees Consider Themselves ‘Expert’ or ‘Seasoned’ Travelers.

In evaluating the level of travel expertise and its impact on attendance, 58% of All respondents consider themselves ‘Expert’ or ‘Seasoned’ travelers (4-5 on a scale of 5) who are able to ‘navigate just about anything’, down slightly from 61% in 2014. While there were few variances by generation, analysis by attendance frequency revealed that 70% of Always attendees considered themselves as expert or seasoned travelers versus fewer than half (47%) of the Nevers.

Bottom line, offering travel assistance or helping them ‘navigate’ their way to the destination not only shows you care, but also may increase attendance at the ‘margins’.

Helping Them Get to the Event May Increase Your Margins.
**ATTENDEES AS CONSUMER$**

Change in Travel Expertise

**Level of Travel Expertise is Increasing.**

The level of change in travel expertise was also evaluated, with 41% of all respondents saying it’s *About the Same*, while 52% reported they have *More* or *Much More* expertise than five years ago, up slightly from the 2014 survey.

Analysis by attendance frequency revealed that 64% of the *Always* attendees report they have *More* or *Much More* expertise than five years ago (up from 60% in 2014) contrasted to 45% of the *Occasionals* and *Nevers* (same as 2014).

Interestingly, by generation, 69% of *Gen Y Millennials* report having *More* or *Much More* expertise compared to 52% of *Gen Xers* and 49% of *Boomers*. Trending this over time will be important.
Segments & Methodology
Total Responses: 8,992

Segment #1: Generation

Three-quarters (74%) of survey respondents are from two generations that comprise most of today’s full-time workforce — Gen Xers (28%) and Boomers (46%) — a prime target for marketing and promotion. Special insight was also gained from Pre Boomers and Gen Y Millennials, combining to 27%.

The breakdown of generations for the 2014 and the 2017 survey varied slightly, with Gen Y Millennials rising from 11% to 18% of respondents; Gen Xers from 27% to 28%; Boomers dropping from 53% to 46%, and Pre Boomers maintaining at 9%.

**GEN Y / MILLENNIALS**
Born 1980-2000
Age 17-37
1,581 — 18%

**Gen X**
Born 1965-1979
Age 38-52
2,475 — 28%

**BOOMERS**
Born 1946-1964
Age 53-71
4,140 — 46%

**PRE BOOMERS**
Born 1900-1945
Age 72+
796 — 9%

Copyright © 2017 The EXPERIENCE Institute®. Protected by laws of Copyright & Trademark. All rights reserved. Any adaptation of the survey results is prohibited without prior written permission of The EXPERIENCE Institute®. TheExperiencInstitute.org
Total Responses: 8,992

Segment #2: Attendance Frequency

The NEVERS
2,642 — 29% Have Never Attended
232 — 3% No Longer Attend

The OCCASIONALS
1,786 — 20% Attend Every 6-10 Years

The FREQUENTS
2,376 — 26% Attend Every 2-5 Years

The ALWAYS
1,956 — 22% Attend Every Time

The total of 8,992 surpasses the 2014 survey total of 7,171.

When looking at attendance frequency, respondents reflected a relatively even distribution of roughly one-quarter for each of the four segments — Nevers, Occasionals, Frequents, Always — which parallels the 2014 survey.

The mutual objective of meeting professionals and destinations is to implement strategies to move individuals along this continuum — to a higher frequency of attendance.
Total Responses: 8,992

Segment #3: Propensity / Likelihood to Attend

To gauge the overall propensity to attend, the question was asked: “If time and money were no object, how likely are you to attend conventions / exhibitions, in general?”

A remarkable 91% of the survey respondents are segmented as Likelys, meaning they are Likely or Highly Likely to attend. Even those reporting they never attend conventions / exhibitions indicate they would be likely to attend, with percentages paralleling 2014.

Overall, the Propensity to Attend is high, which is good news for the future of face-to-face / F2F.

**The UNLIKELYs**
- 279 — 3% Highly Unlikely
- I prefer not to attend conventions / exhibitions
- 537 — 6% Unlikely

**The LIKELYs**
- 2,797 — 31% Likely
- 5,379 — 60% Highly Likely
- I like to attend conventions / exhibitions
Total Responses: 8,992

Decision to Attend 2 — Survey Methodology

OBJECTIVE: Gain initial behavioral insight from actual and prospective attendees relative to the decision to attend.

Survey of Members, Attendees, and Prospective Attendees
The following twelve (12) organizations, representing a wide range of industries and professions, volunteered to send an e-mail inviting participation in an online survey. Each organization targeted its normal list of prospective attendees, e.g., past attendees, non-attendees, members, executives and business owners.

- Academy of General Dentistry
- AACC International
- American Phytopathological Society
- Americas Committee for Treatment and Research in Multiple Sclerosis
- Association of Equipment Manufacturers
- Association of Rehabilitation Nurses
- International Association of Administrative Professionals
- Master Brewers Association of the Americas
- National Association of Neonatal Nurses
- National Shooting Sports Foundation
- TESOL International Association
- Unitarian Universalist Association

- Analysis was based upon numerous factors, focusing on three core segments: Generation, Propensity to Attend, and Attendance Frequency.
- Responses were weighted based on response count ratio of returning/new organizations between the 2014 and 2017 surveys in order to create better comparability between the two.
- Received 8,992 complete responses, with Margin of Error at +1.03%.
- An incentive was offered via opt-in entry into a random drawing for one of two $1,000 cash prizes or donation to charity of recipient’s choosing.
- The survey was open to each organization for a two week period beginning March 10, 2017 and ending April 25, 2017.
Through its consumer-driven standards framework, The EXPERIENCE Institute® (TEI) is dedicated to enhancing the destination experience for attendees, leisure travelers and residents through ongoing research and industry collaboration.

The EXPERIENCE Institute®

The Professional Convention Management Association (PCMA) is the world’s largest network of Business Event Strategists, with just under 7,000 members and an audience of over 50,000 individuals, with activities across 37 countries.

PCMA.org

The International Association of Exhibitions and Events™ (IAEE) is the leading association for the global exhibition industry, representing over 10,000 individuals in 52 countries who conduct and support exhibitions around the world.

IAEE.com

The American Society of Association Executives (ASAE) is the essential organization for association management, with more than 39,000 individual members representing 7,400 organizations from trade associations to individual membership societies from every sector of the economy.

ASAEcenter.org

Meeting Professionals International (MPI) is the largest meeting and event industry association worldwide with a global community of 60,000 meeting and event professionals and more than 17,000 engaged members, from over 90 chapters and clubs in 19 countries.

MPIweb.org

Destinations International is the world’s largest resource for destination organizations, representing over 600 destinations in approximately 15 countries.

DestinationsInternational.org

Industry Collaboration

Thank You for Fueling the Vision.

To stay current on the Decision to Attend study, go to your professional organization website or to: TheExperienceInstitute.org