MAXIMIZE ATTENDANCE

THE
DECISION TO
ATTEND STUDY
FOR CONVENTIONS & EXHIBITIONS

AN EXAMINATION OF THE BEHAVIORS BEHIND THE DECISION TO ATTEND

DECISION TO ATTEND 2 — 2017

A COLLABORATIVE INITIATIVE

pcma Professional Convention Management Association
IAEE Exhibitions and Events Mean Business www.iaee.com
DESTINATIONS INTERNATIONAL
asae The Center for Association Leadership
MPI MEETING PROFESSIONALS INTERNATIONAL

CONDUCTED BY: THE EXPERIENCE INSTITUTE®

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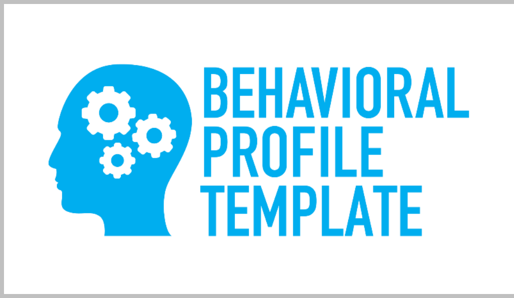

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Executive Summary

THE
DECISION TO ATTEND STUDY
FOR CONVENTIONS & EXHIBITIONS

Second Survey
Decision to Attend 2: 2017

Total Responses: 8,992

DECISION TO ATTEND STUDY

Introduction

Research Objective

Identify the factors impacting the **Decision to Attend** relative to the total visitor experience, upon which meetings/exhibition professionals and destinations can build their attendance promotion strategies.

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!

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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

DECISION TO ATTEND STUDY

Research Sponsors

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

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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!

DECISION TO ATTEND STUDY

Research Objective

Identify the factors impacting the **Decision to Attend** relative to the total visitor experience, upon which meetings / exhibition professionals and destinations can build their attendance promotion strategies.

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.

Every recipient of a meeting promotion asks:

Do I need to go?

Do I WANT to go?

Getting them to YES is critical.

DECISION TO ATTEND STUDY

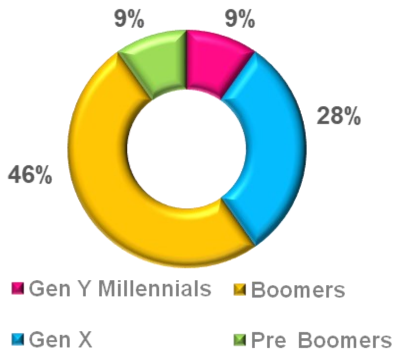
Key Findings

DECISION TO ATTEND STUDY

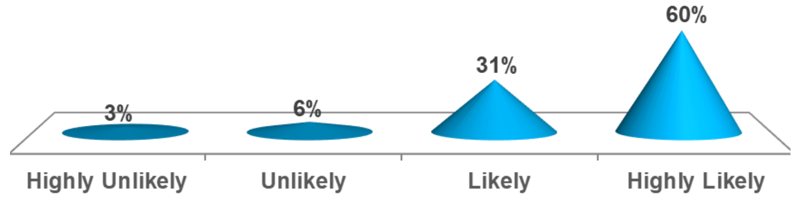
SURVEY SEGMENTS

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).*

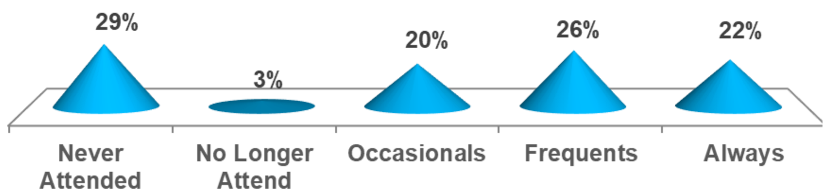
— By Generation —



— 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 *Frequents*, and the *Frequents* to *Always*

Nevers → Occasionals (Every 6-10 Years) → Frequents (Every 2-5 Years) → Always

Key Findings

DECISION TO ATTEND STUDY

ARE THEY ADULT LEANERS?

Future of Face-to-Face Meetings is Strong

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?

Top Three Drivers Remain Consistent

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.

#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

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.

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% *Frequents* 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 *Frequents* and 32% of the *Occasionals*. 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.

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.

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."

Use a *Justification Toolkit* to help them get approval, including a sample letter to their supervisor and list of benefits to their organization.

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

WHAT ARE THE BARRIERS?

Barriers are Cost, Time, Destination & Approval

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'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 *GenY Millennials* and *Gen Xers* it was *Don't Get Around to it Sooner.*

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.

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

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.

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

The sale is made when the convention leaves.

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*.

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.

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."

Ongoing Research

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.

DECISION TO ATTEND STUDY

Targeted Marketing

BEHAVIORAL PROFILE TEMPLATE

Created by CVBs and Meeting/Expo Professionals

DECISION TO ATTEND STUDY

BEHAVIORAL PROFILE TEMPLATE

DETERMINE BEHAVIORS ● MAXIMIZE ATTENDANCE

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."

— Industry-wide Collaboration —

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DECISION TO ATTEND STUDY

Study Findings — Top Attendance Drivers!

- 92% Education & Staying Abreast
- **78% The Destination** — Attendees are Discerning Travelers!
- 76% Networking

Strategic marketing is often needed to convince them to attend!

Source: DTA 2nd Study 2017
8,992 Respondents

THE EXPERIENCE INSTITUTE®

Questions? Feedback?

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

Template Page 1 of 2

BEHAVIORAL PROFILE TEMPLATE

DETERMINE BEHAVIORS • MAXIMIZE ATTENDANCE

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

DECISION TO ATTEND STUDY

MAXIMIZING ATTENDANCE

DECISION TO ATTEND 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.

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

DECISION TO ATTEND STUDY

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!

BEHAVIORAL PROFILE TEMPLATE

Key Findings

The Breakdown

THE
DECISION TO
ATTEND STUDY
FOR CONVENTIONS & EXHIBITIONS

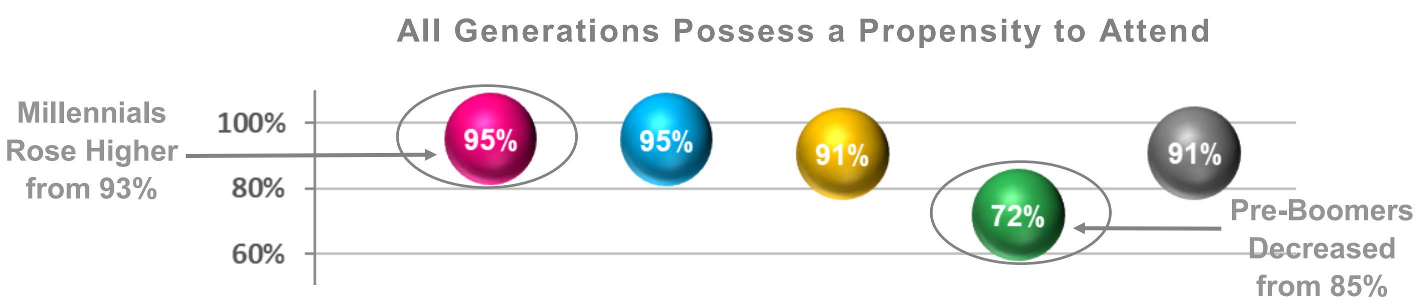
Quick-Read Charts & Graphs

91% are likely to attend —with younger generations trending strong.

DECISION TO ATTEND STUDY

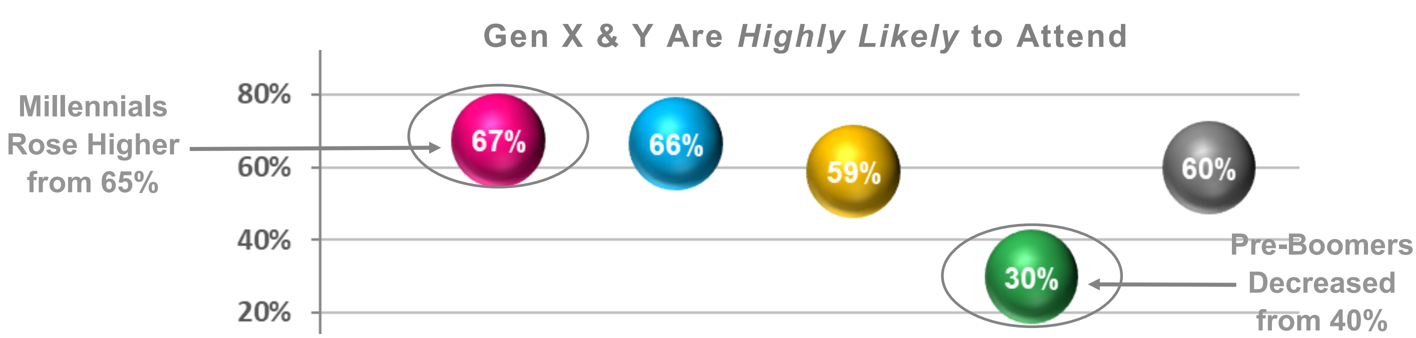
I. PROPENSITY TO ATTEND AS ADULT LEARNERS

The Future of F_2F is Strong



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 / F_2F 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.



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.

There's a good 'pipeline' of younger attendees who want to continue their education.

DECISION TO ATTEND STUDY

PROPENSITY TO ATTEND

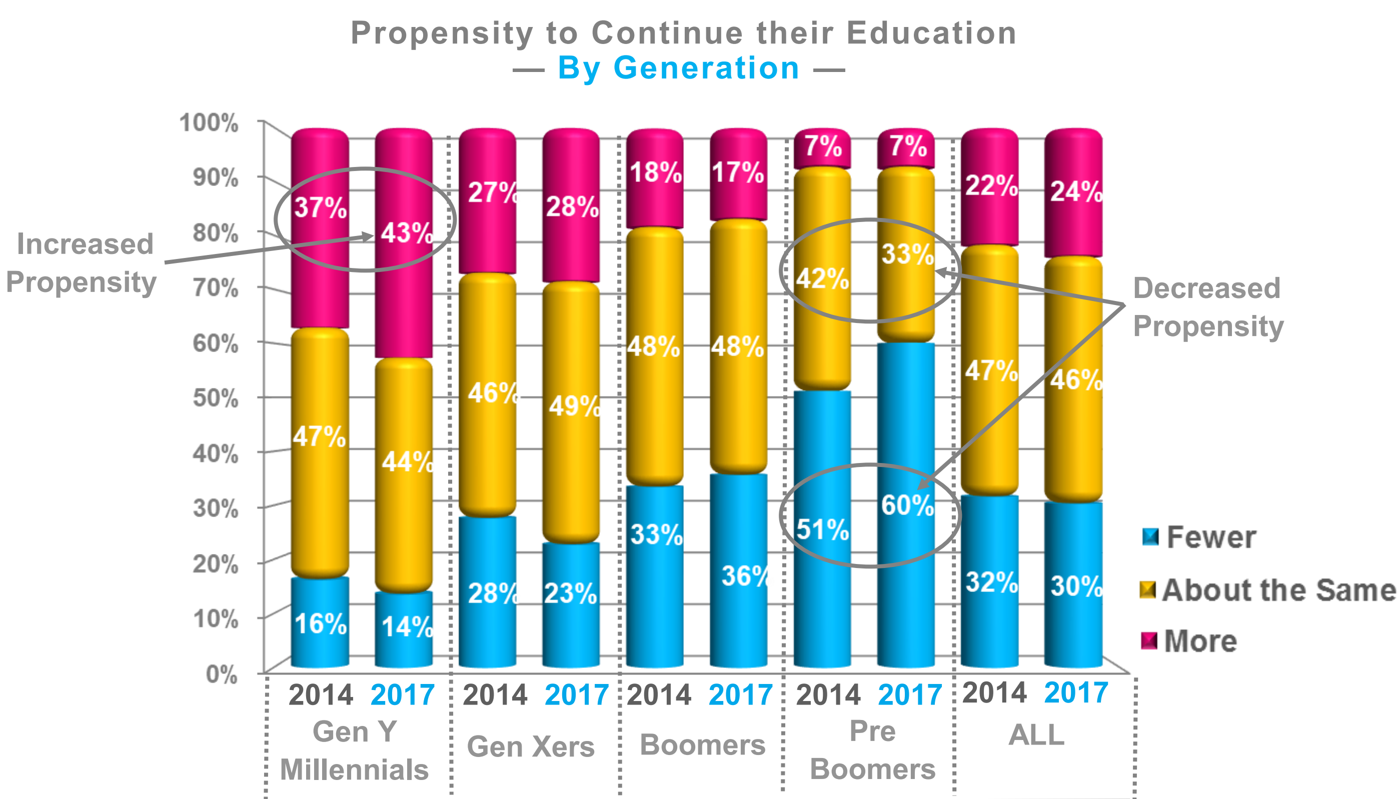
Attendees as Adult Learners

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%.



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DECISION TO ATTEND STUDY

Even the Never attendees want to continue their education.

PROPENSITY TO ATTEND

Attendees as Adult Learners

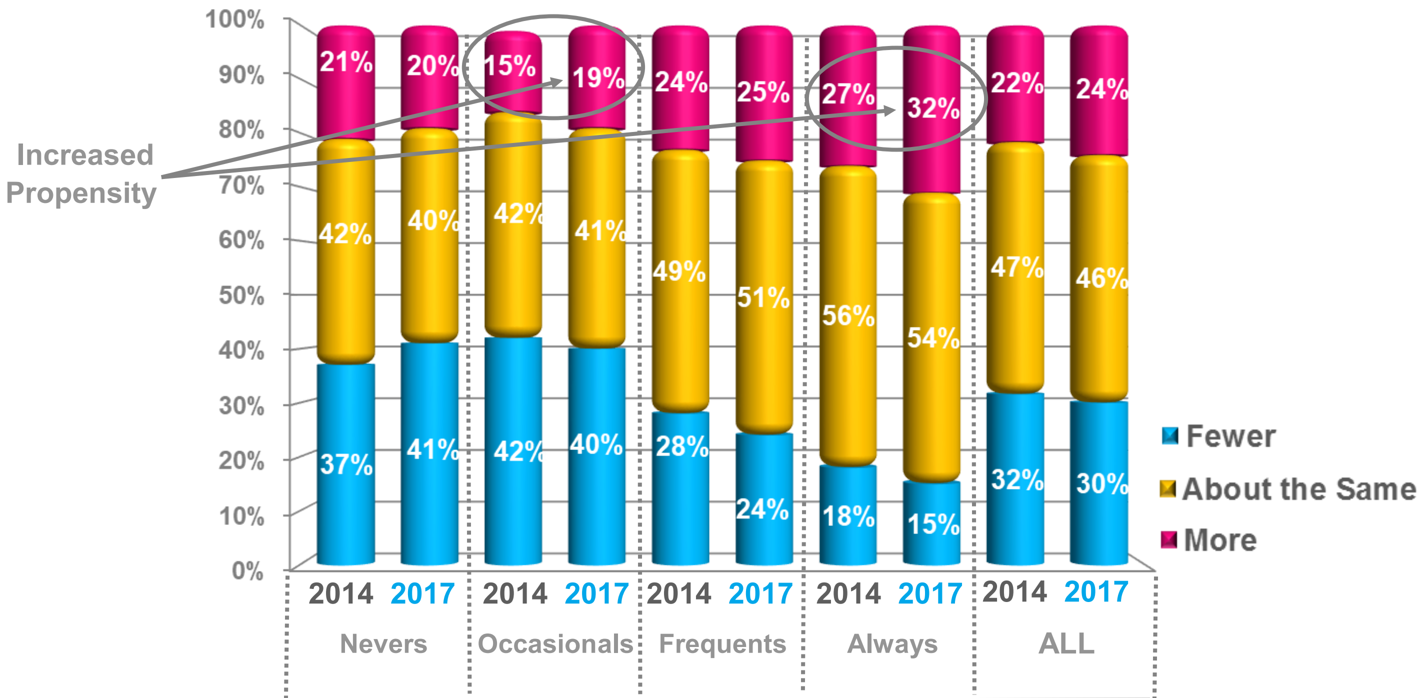
The Propensity to Learn Impacts Attendance Frequency.

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 — another positive sign for the future.

Propensity to Continue their Education
— By Attendance Frequency —



The top attendance drivers are Education / Staying Abreast, Networking, and Destination / Location

DECISION TO ATTEND STUDY

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%.

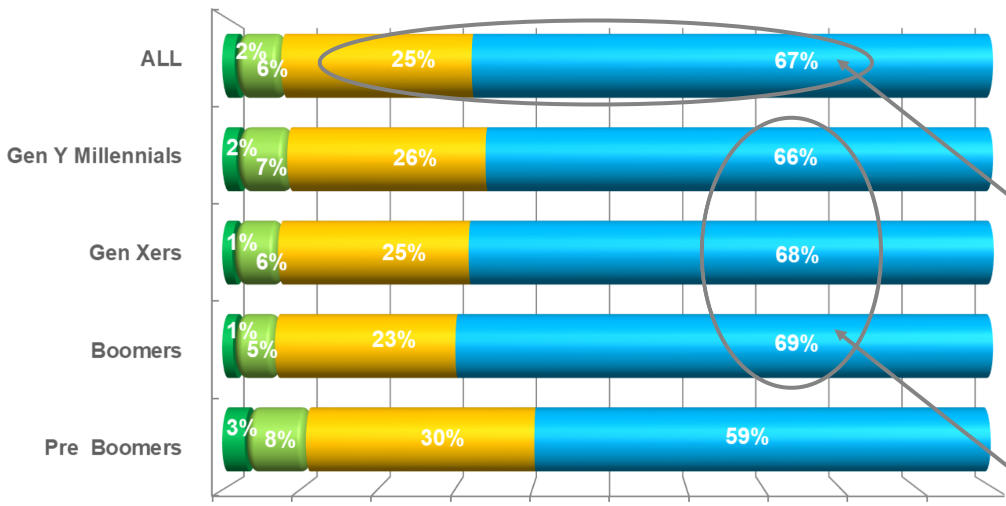
Whether by generation or frequency, education is important.

DECISION TO ATTEND STUDY

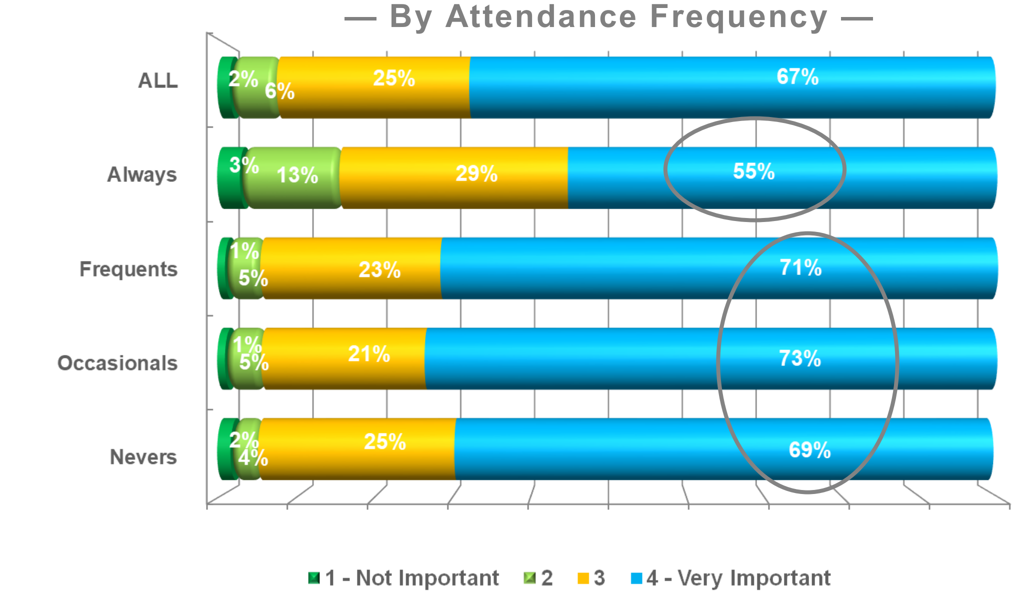
ATTENDANCE DRIVER #1

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

— By Generation —



— By Attendance Frequency —



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 generation (top chart), two-thirds rated education high.

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).

DECISION TO ATTEND STUDY

Over half of Occasional and Never attendees rate Staying Abreast as very important.

ATTENDANCE DRIVER #1

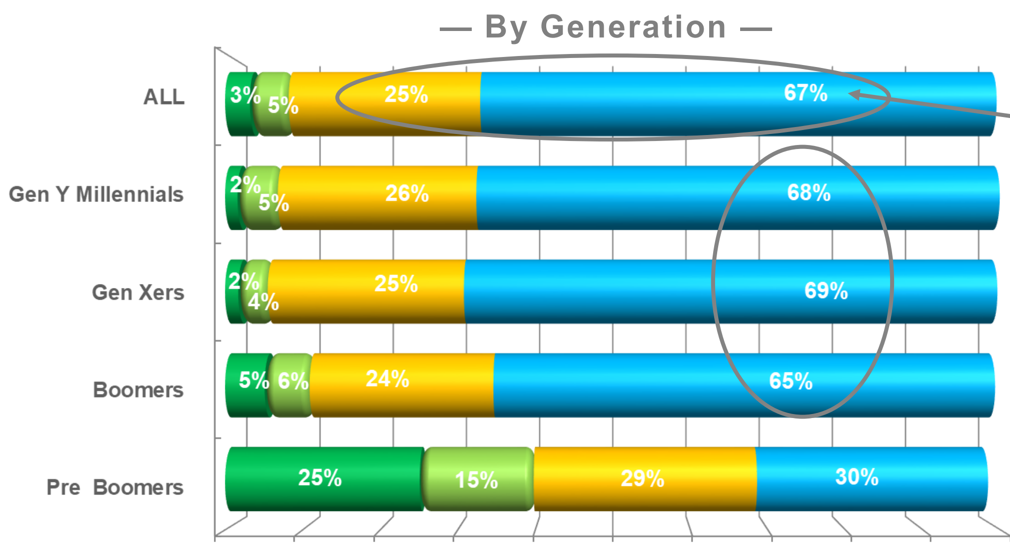
Keeping Up and Staying Abreast of Their Profession / Industry

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%.

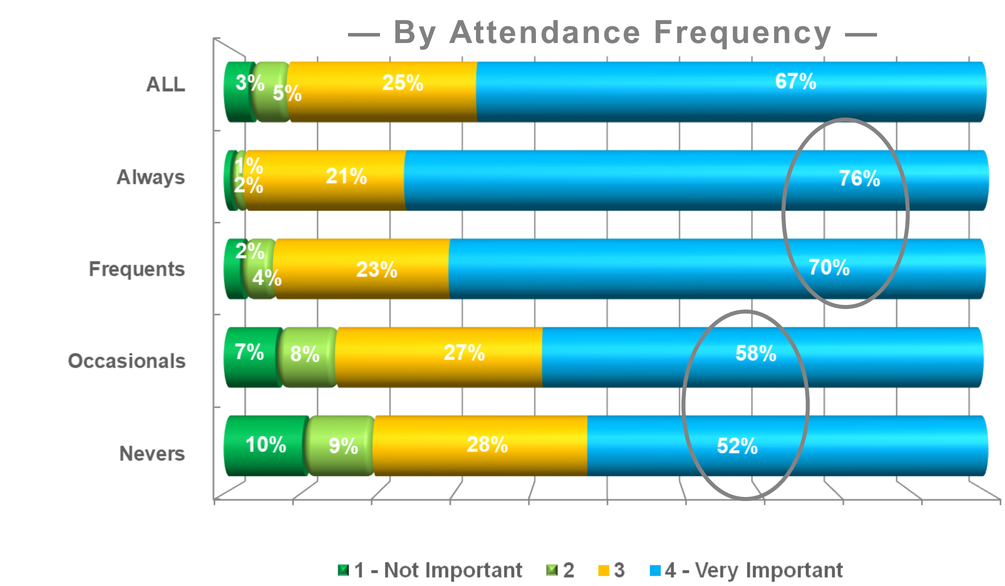
Broken down, 2/3 of the three largest workforce categories are remarkably similar in their Very Important ratings.

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



Staying abreast is a major factor in attendance frequency, with the *Always* attendee rating it at 76% *Very Important* and the *Frequents* at 70%.

Surprisingly, over half of the *Occasionals* and *Nevers* rated staying abreast as *Very Important* — something to include in targeted messaging.



DECISION TO ATTEND STUDY

For 78% of prospective attendees, the destination impacts their decision.

ATTENDANCE DRIVER #2

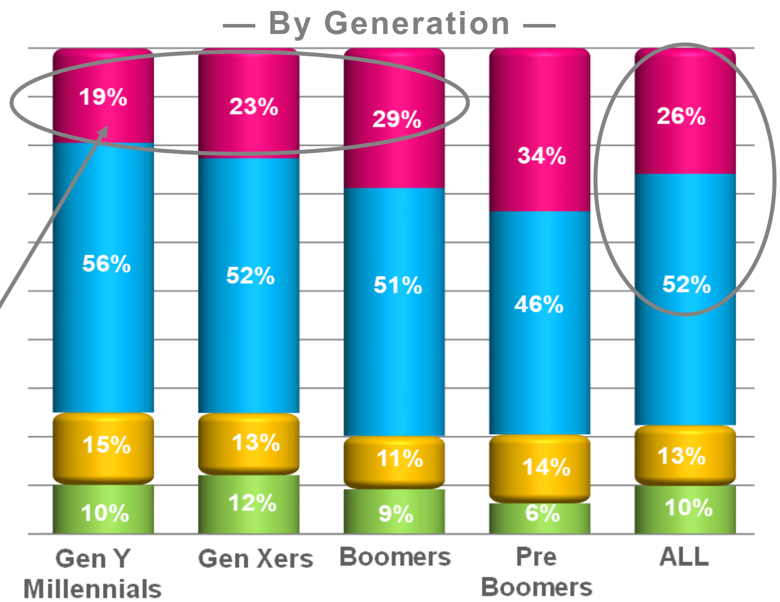
Importance of Destination / Location

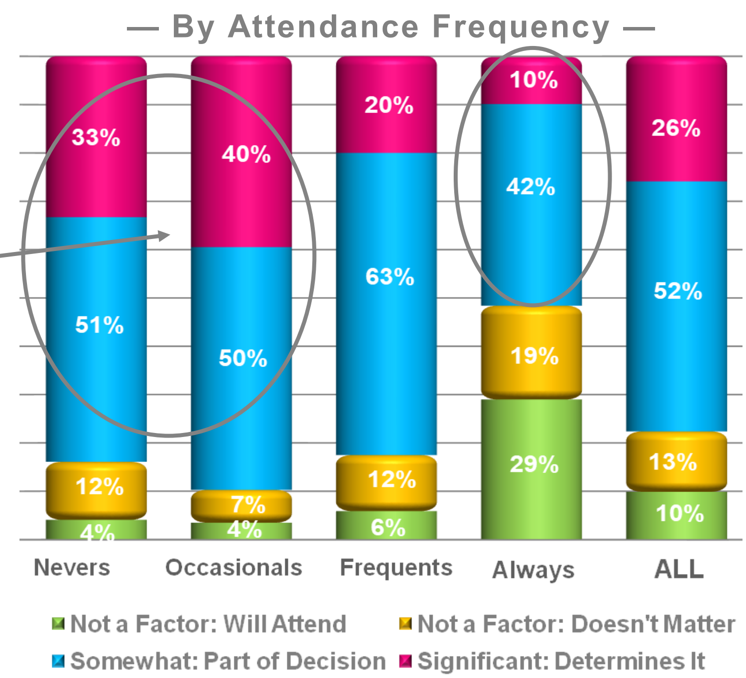
The Destination / Location Impacts the Decision.

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.





DECISION TO ATTEND STUDY

Younger generations value opportunities to network and make connections.

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.

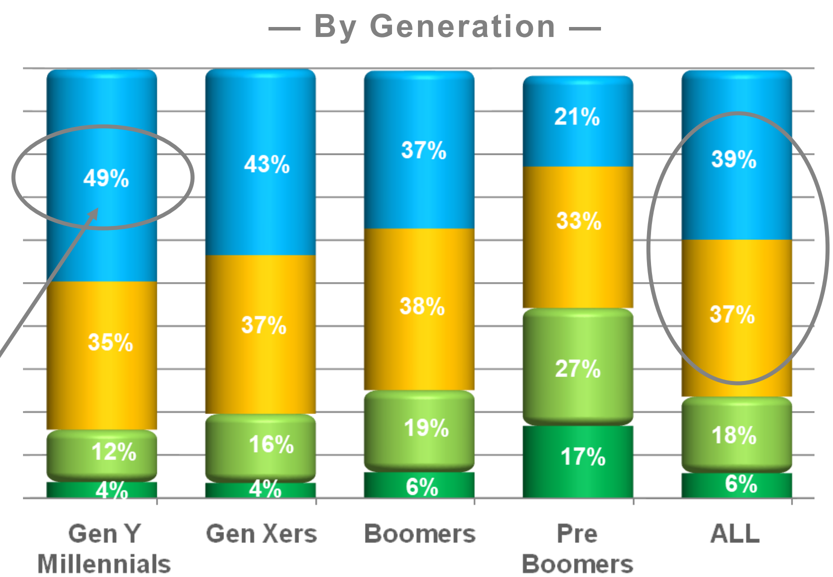
Significant changes occurred since 2014. Three generations reflected higher importance in the *Very Important* category, as follows:

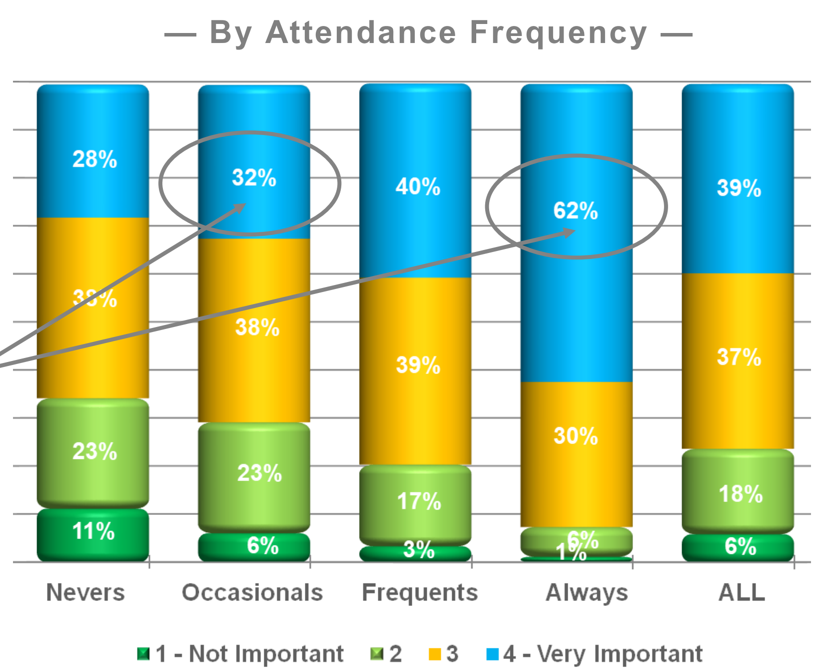
- ***Gen Y Millennials* - from 41% to 49%**
- ***Gen Xers* - from 40% to 43%**
- ***Boomers* - from 35% to 37%**

As the *Millennials* age, building their network is increasingly important; another good sign for F_2F 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 *Occasionals* 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.





DECISION TO ATTEND STUDY

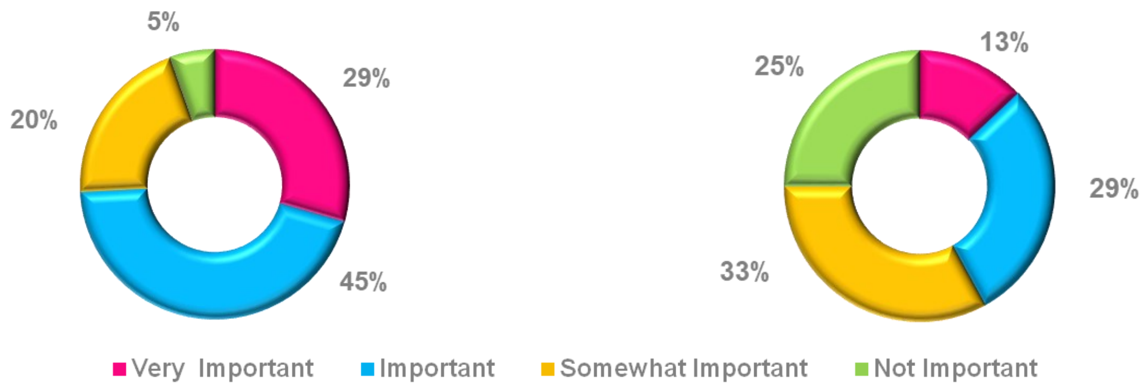
Attendees want to socialize at the meeting, but less so on social media.

ATTENDANCE DRIVERS

Social Interactions

Importance of Opportunities for Social Interaction / Discussions

Importance of Social Media Opportunities to Engage With Others



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 / F_2F 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 F_2F 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.

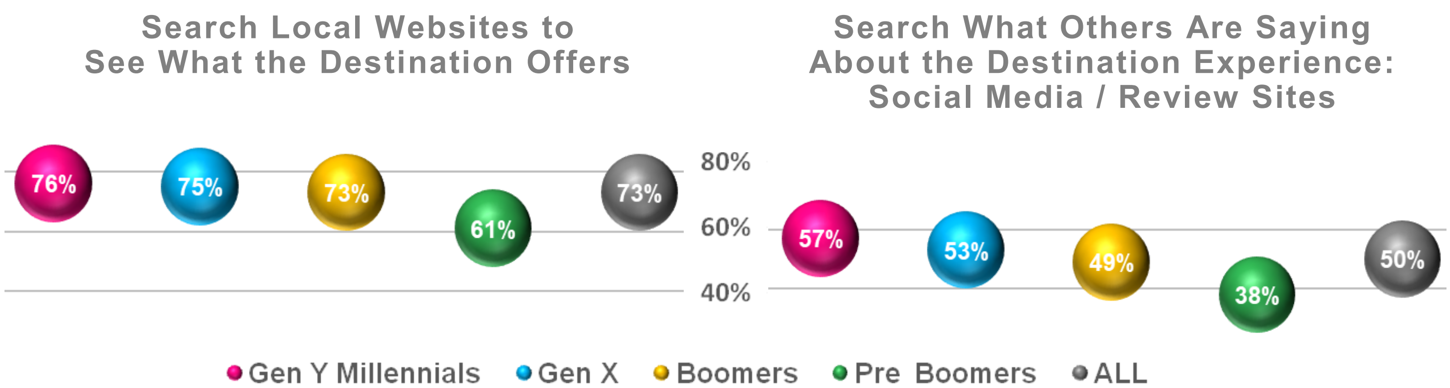
This has significant implications. Facilities and meeting professionals will need to stay ahead of this trend and monitor it over time.

DECISION TO ATTEND STUDY

Attendees will search local websites, social media and review sites to learn about the destination.

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 *Frequents* 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.

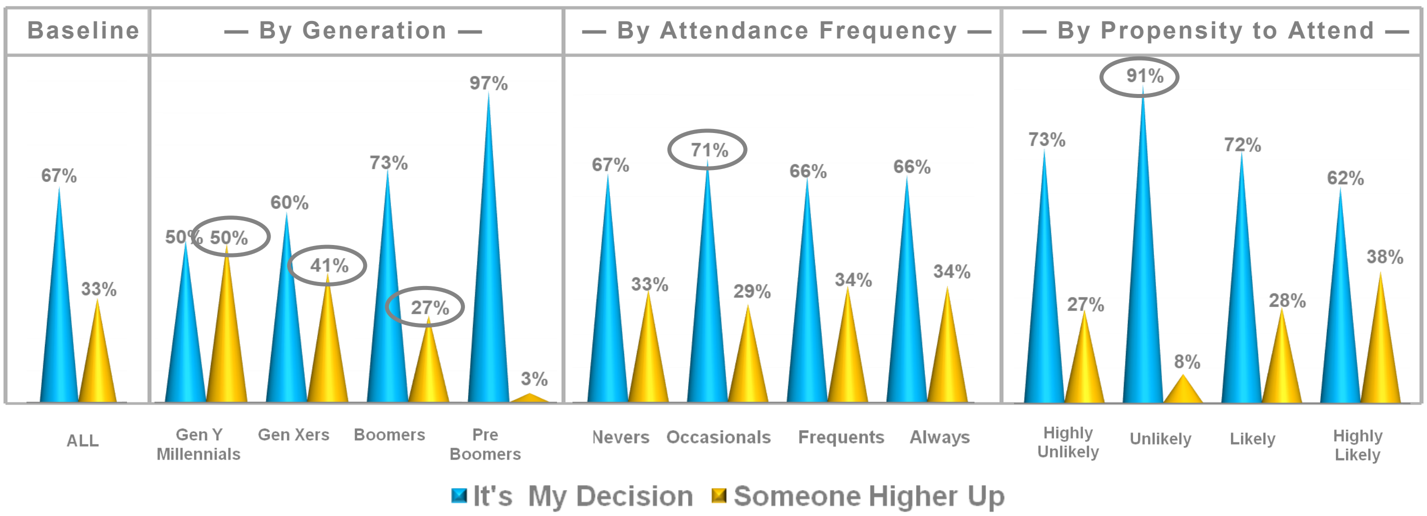
These are important trends to monitor over time.

DECISION TO ATTEND STUDY

For one-third of prospective attendees, someone 'higher up' makes the decision.

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.

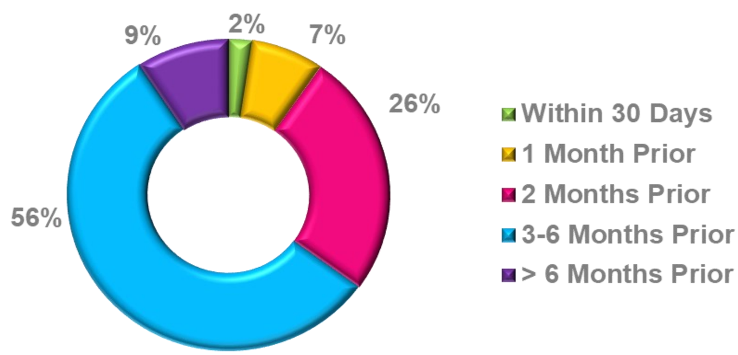
Another surprise was the *Propensity / Likelihood to Attend* segment. A remarkable 91% of the *Unlikelys* make the decision themselves — higher than those who frequently attend, increasing from 85% in 2014. Other questions revealed the *Unlikelys* are more likely than others to use the convention / exhibition 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.

Most register 2-6 months prior, but 10% decide in one month or less — something to watch over time.

DECISION TO ATTEND STUDY

THE DECISION PROCESS

When Do They Decide



Trending the Timing of the Decision is Important to See if You Are 'On Pace' with Attendance Projections.

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.

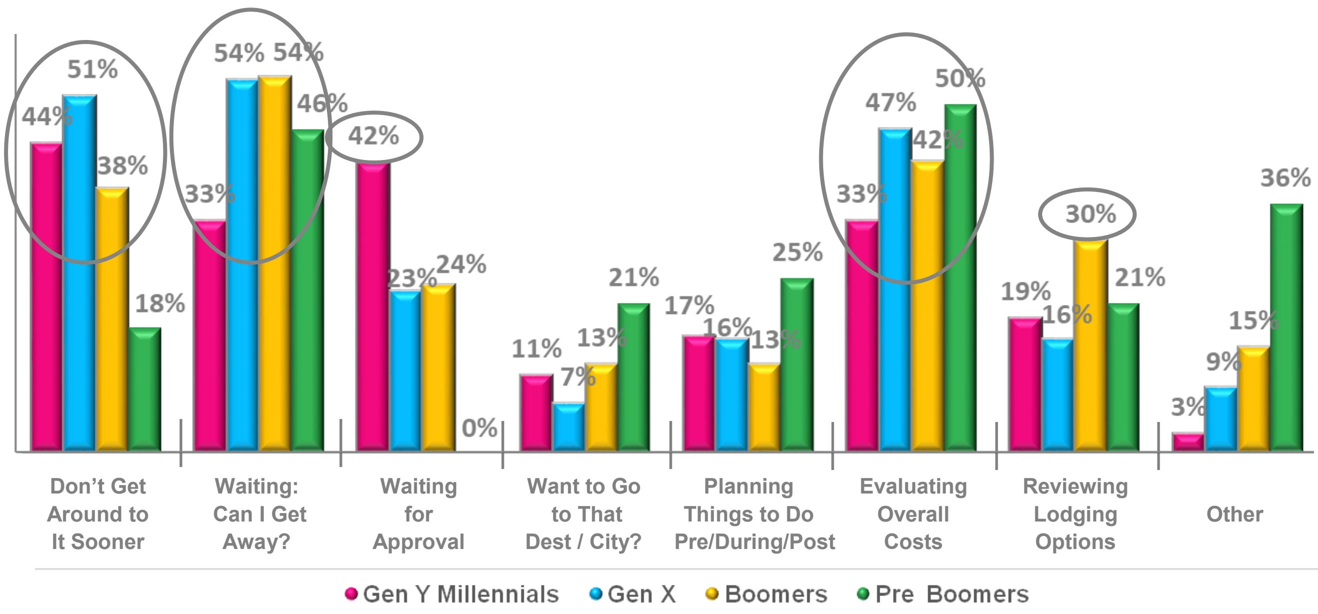
Numerous write-in comments mentioned the need for easy access to and reminders of future dates and locations — even several years ahead — to allow time to get it into their budgets and/or obtain approval to attend. One commented, ***"How can I budget for it, if I can't find future convention dates on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

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

DECISION TO ATTEND STUDY

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

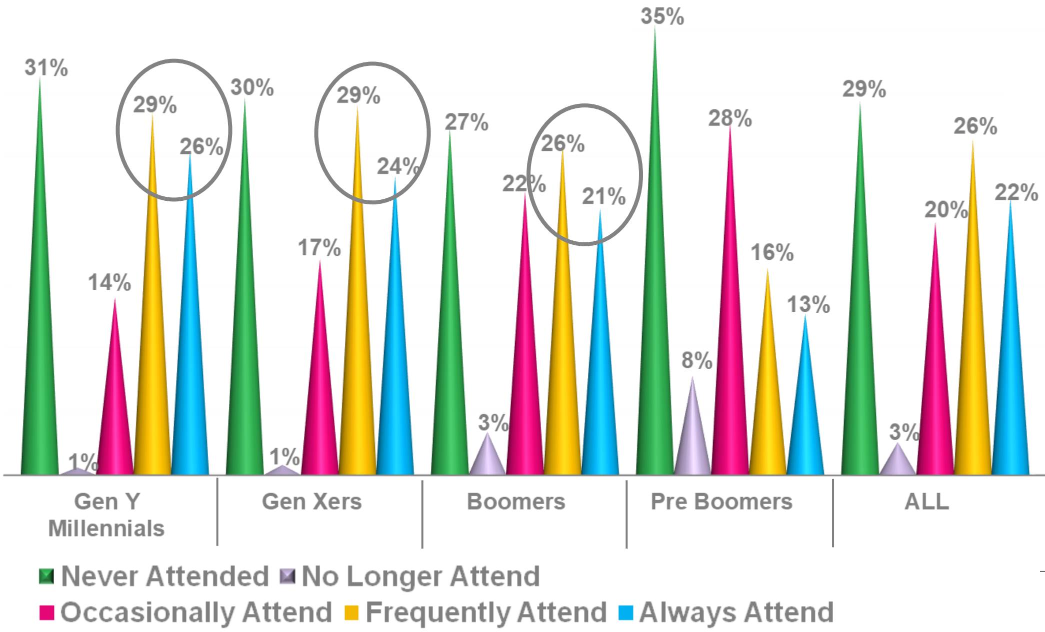
The outliers (small circles) were *Gen Y Millennials* who report they were *Waiting for Approval,* as most are now in the workforce. And, 30% of *Boomers* reporting they were *Reviewing Lodging Options.*

Getting them to attend earlier in their career is key.

DECISION TO ATTEND STUDY

THE DECISION PROCESS

Attendance Frequency



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.

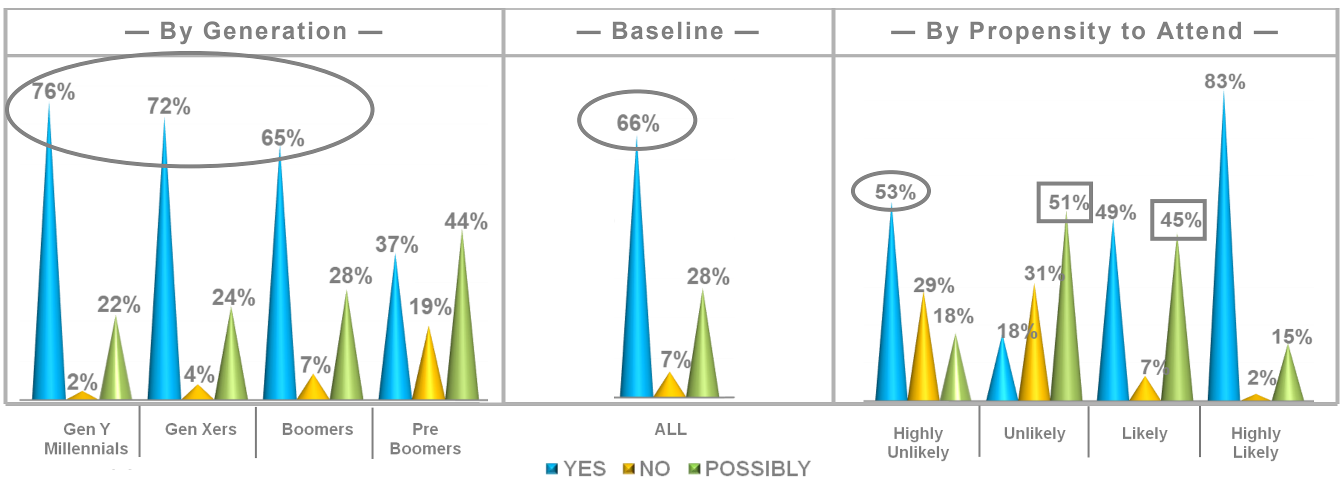
Collectively, we have to convince them and *help* them.

DECISION TO ATTEND STUDY

Two-thirds would attend more often, if circumstances allowed.

THE DECISION PROCESS

Would They Attend More Often



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 / F_2F 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%.

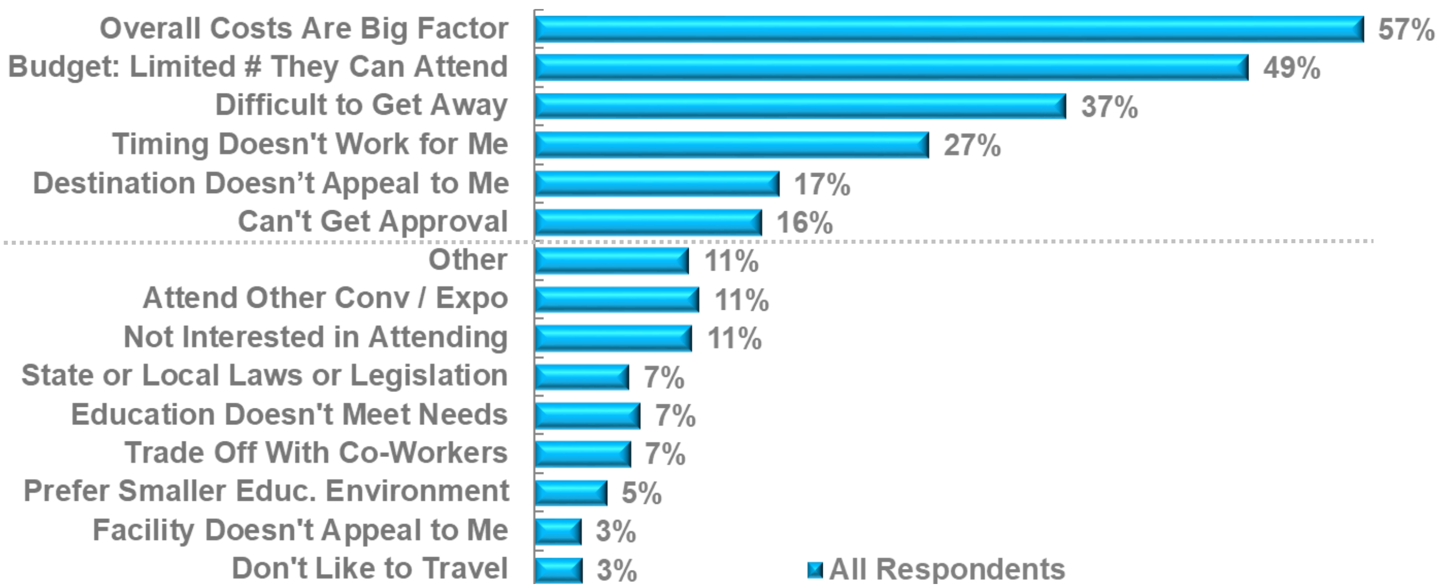
Overall, 66% said YES they would attend more often with Gen Y even higher at 76%.

DECISION TO ATTEND STUDY

It's important to identify and lessen the barriers to attending.

THE DECISION PROCESS

Barriers to Attending More Often



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.

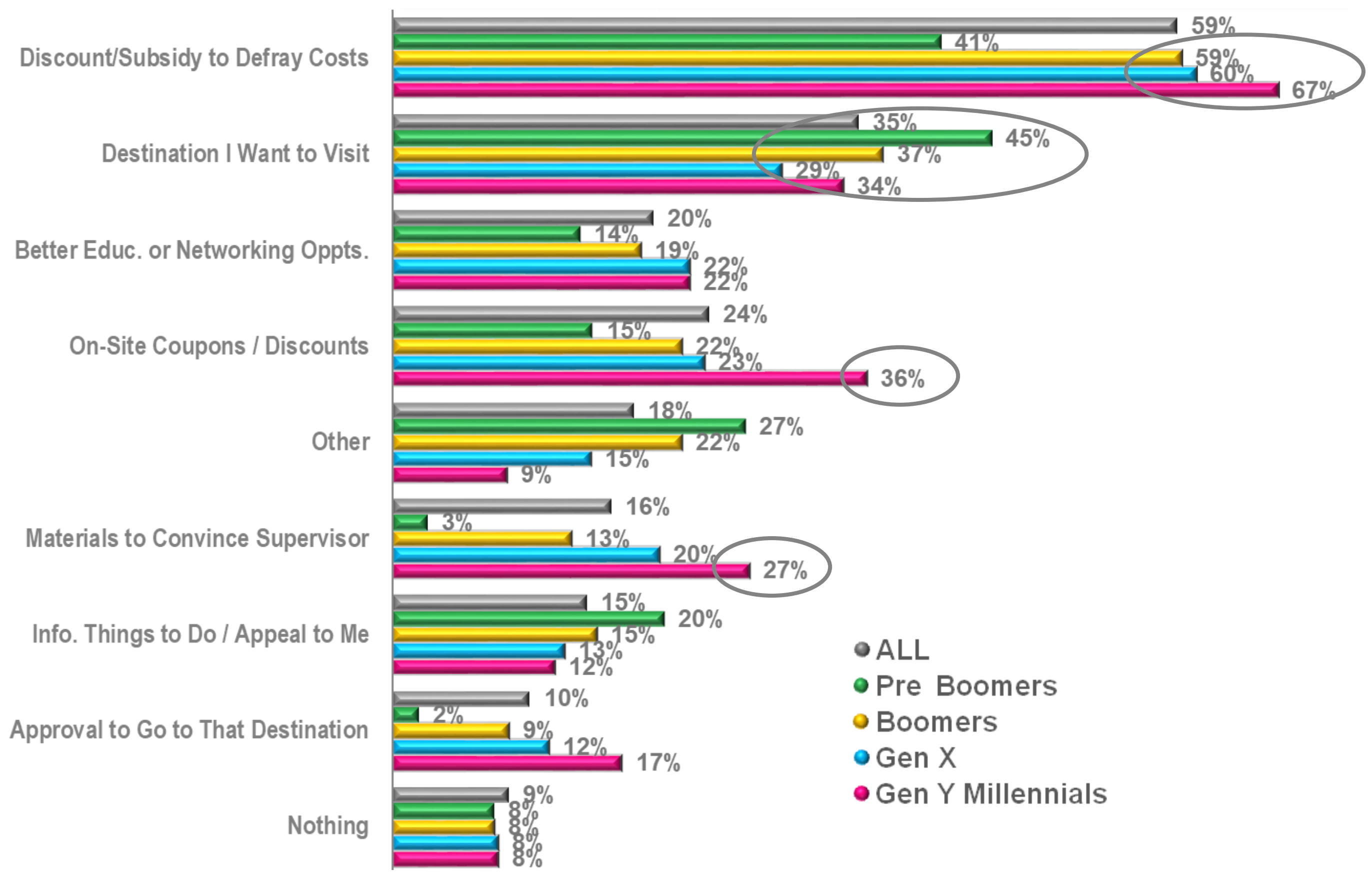
CONVENTION / EXHIBITION: Meeting professionals were curious about other potential barriers. Shown under the dividing line above, these suspected barriers also ranked low for all respondents in 2014.

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

DECISION TO ATTEND STUDY

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:

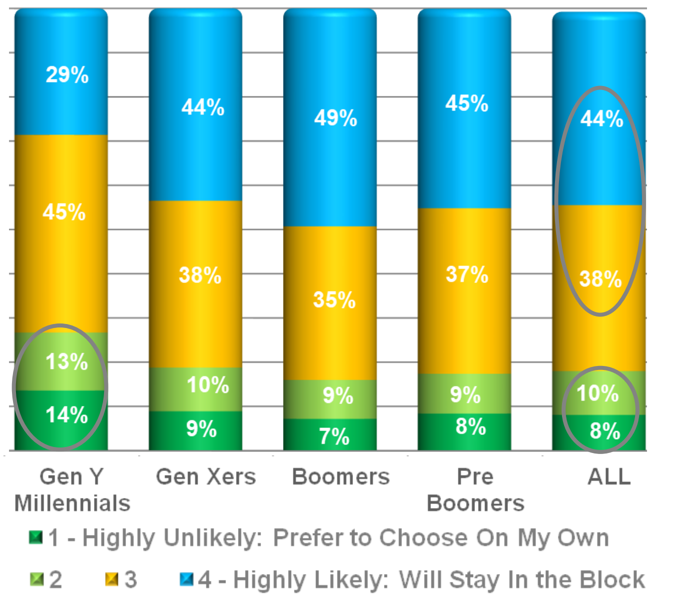
Focusing first on cost, six in ten (59%) of *All* respondents want some type of *'Discount / Subsidy to Defray Costs',* identical to 2014, with two-thirds (67%) of *Gen Y Millennials* rating this highest. One quarter (24%) of *All* respondents want *'On-Site Coupons / Discounts'*, rising to over one-third (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'.*

DECISION TO ATTEND STUDY

Eight in ten will stay in the official block; Gen Y Millennials show slippage.

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.

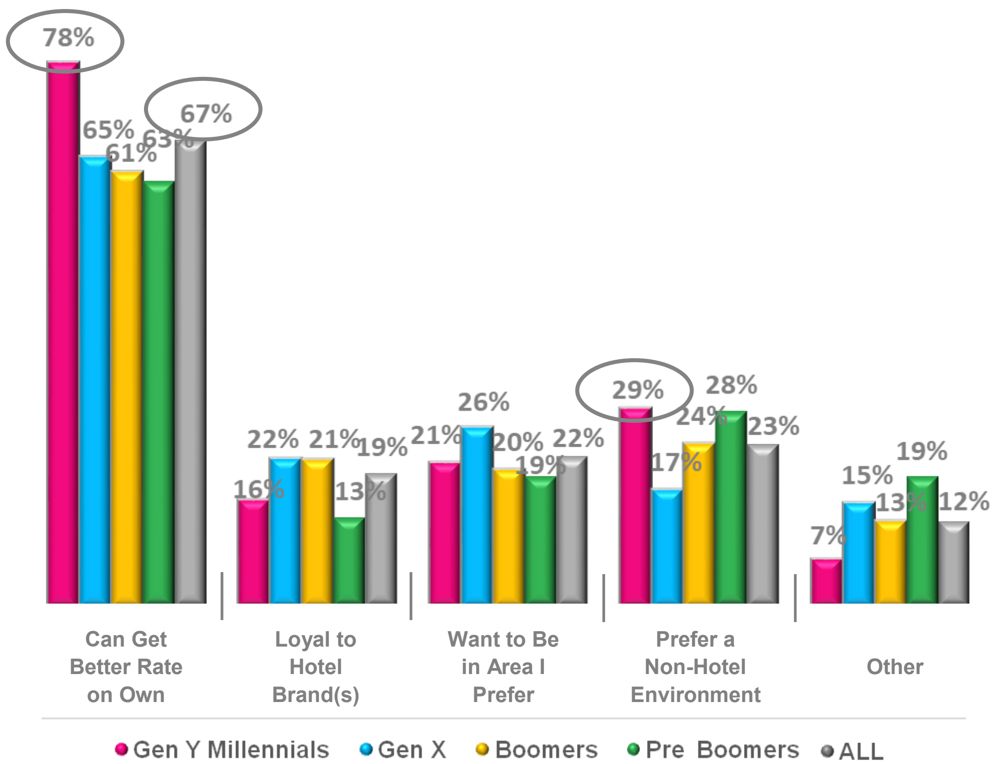
IT VARIES BY GROUP: The above reflects the overall percentages for the 8,992 respondents from the twelve organizations. However, there is significant variation by individual group, ranging anywhere from 53% to 97% being *Likely* or *Highly Likely* to stay in the block. Once again, this shows the significance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

DECISION TO ATTEND STUDY

Room Rate is the Main Reason They Stay Outside the Block.

THE DECISION PROCESS

Reasons for Booking Outside the Block



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.*', with *Gen Y Millennials* even higher at 29%.**

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.

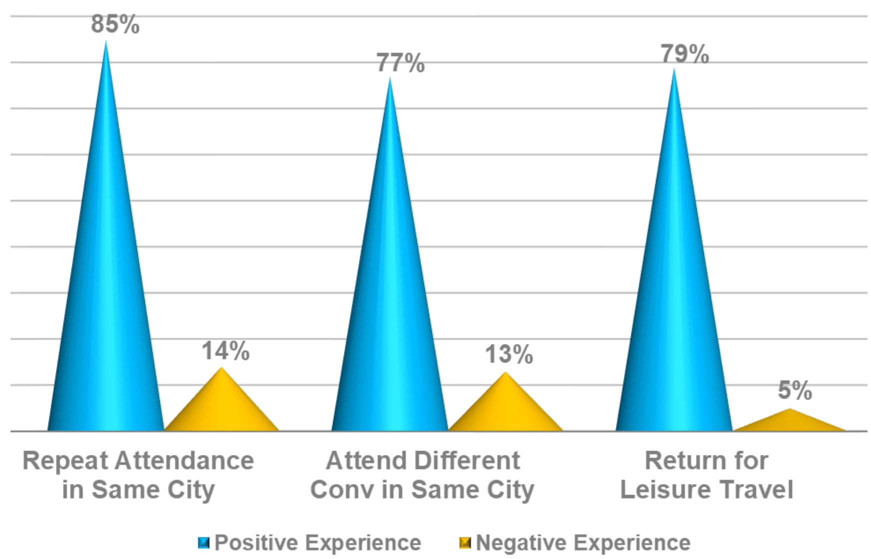
DECISION TO ATTEND STUDY

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

IV. ATTENDEES AS CONSUMER$

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.

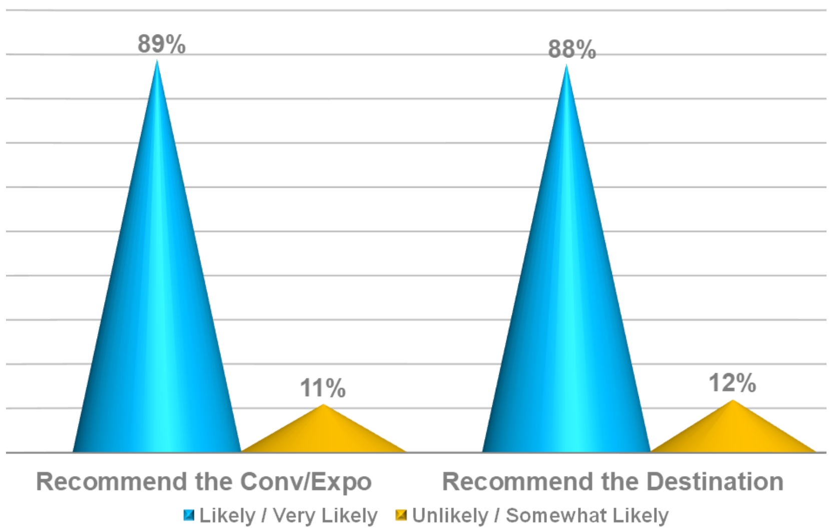
The overall destination experience also fuels repeat visits. The above percentages are from questions that queried the impact of a positive or negative destination experience. If the destination experience is POSITIVE, over three-quarters (79%) of attendees will consider returning for leisure travel. 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.

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

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

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.

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

The sale is made when the convention leaves.

DECISION TO ATTEND STUDY

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

ATTENDEES AS CONSUMER$

Extended Stays / Bringing Others

Extend the Stay	Turn Trip Into Vacation	Bring Others
53%	55%	49%

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.

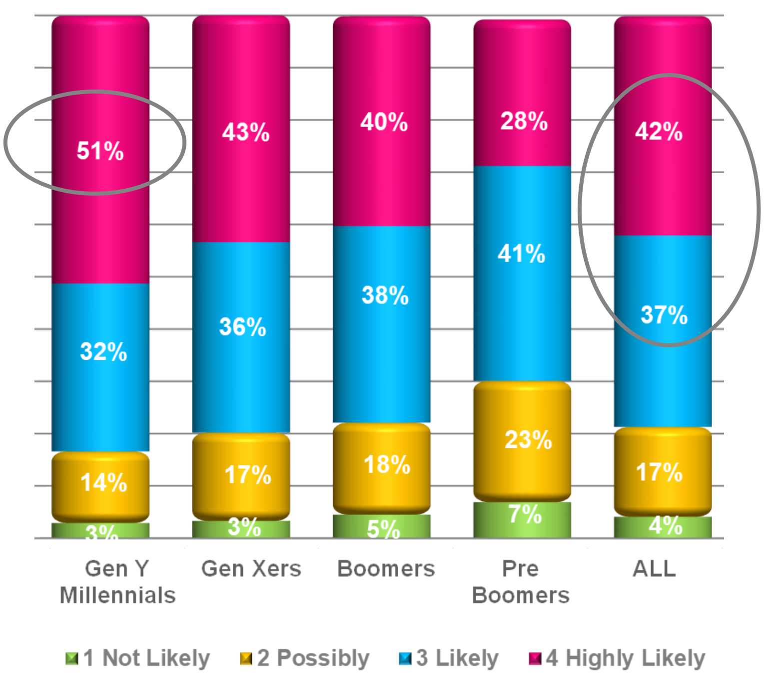
It's time for new metrics on the value of attendees — beyond 'heads in beds'.

Attendees get 'out & about'.
They consume the destination 'product'.

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

Getting 'Out & About'



Attendees grow the visitor spend.

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%.

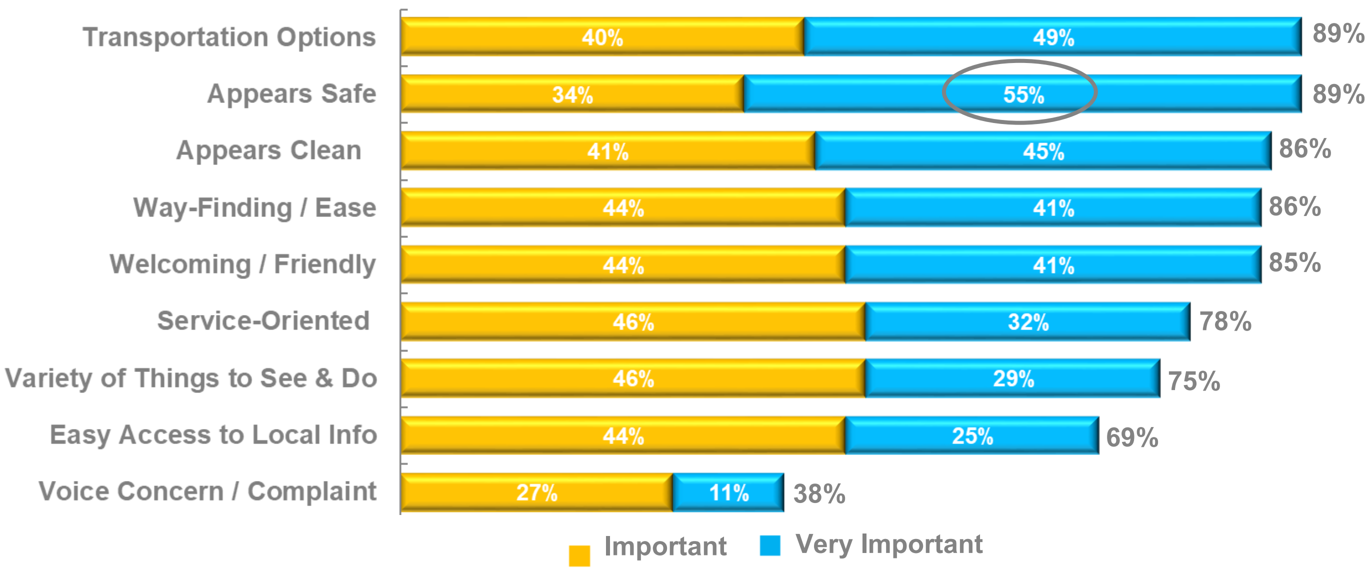
Attendees will grow the visitor spend. They will 'consume' the destination 'product', forming opinions on both the convention / exhibition experience, and the destination experience.

DECISION TO ATTEND STUDY

Attendees have high expectations about the destination experience.

ATTENDEES AS CONSUMER$

Destination Experience Expectations



Attendees Have High Expectations About the Destination Experience.

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.

Safety and Transportation Top the List of What's Important.

Attendees will tell others about their positive or negative experiences.

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

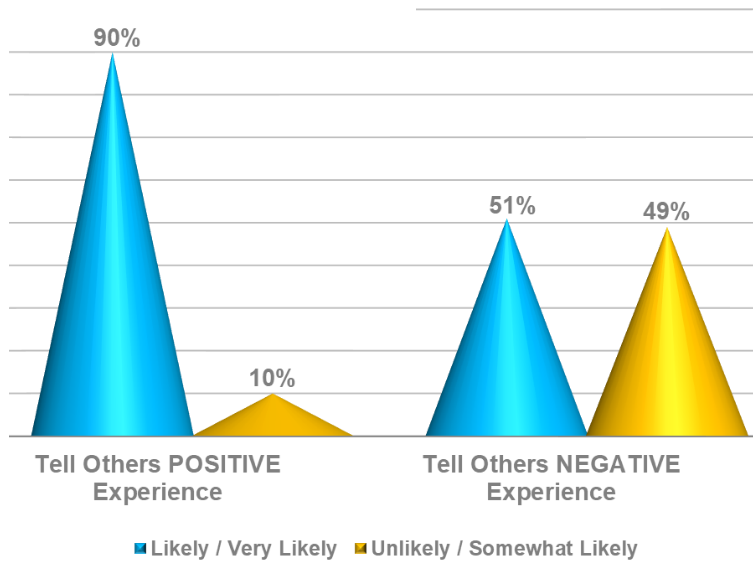
Communicating Their Experiences

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.

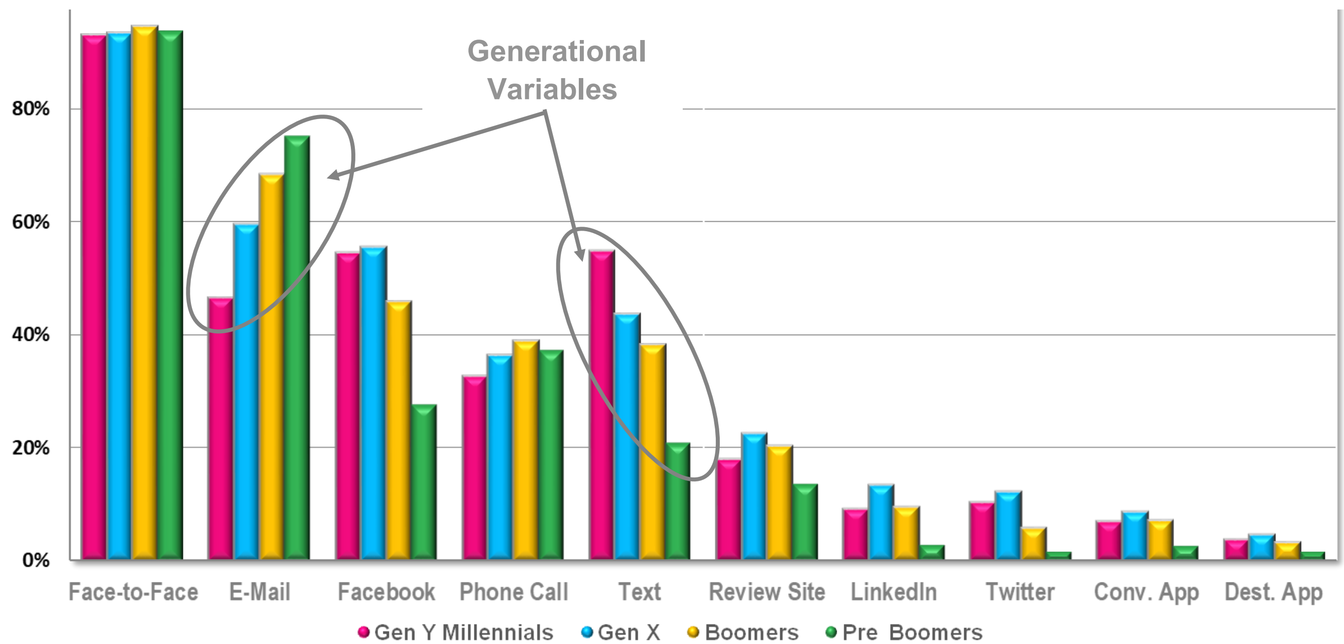
Bottom line, thousands of attendees are spreading positive or negative word-of-mouth — year-over-year. What are they saying? Do you know? More importantly, what actions are being taken destination-wide to address 'the negatives' for future attendees?

DECISION TO ATTEND STUDY

94% of attendees who recommend or tell others will do it face-to-face.

ATTENDEES AS CONSUMER$

Preferred Methods of Communication



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**

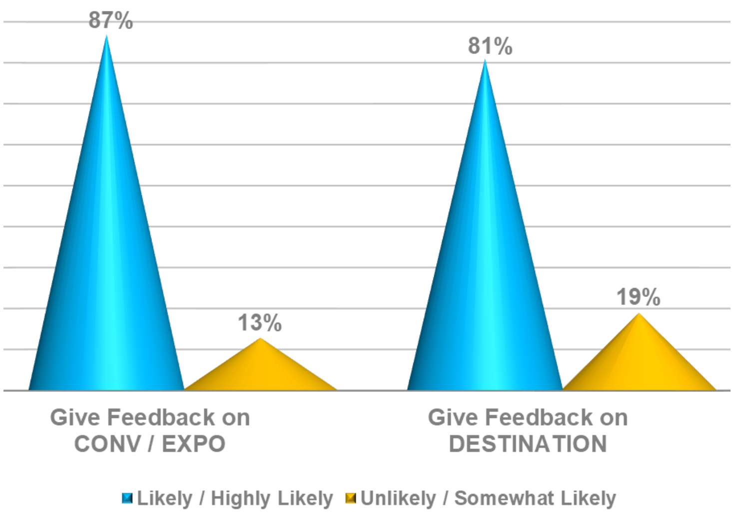
Interestingly, the most marked changes from 2014 were among the *Gen Y Millennials,* with *Facebook* decreasing from 61% to 55% and *Text* reaching a high of 55%, up from 45%.

80% are likely to give feedback, if it's quick and easy.

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

Giving Feedback on Satisfaction



Do You Know How You're Doing in Their Eyes?

Attendees 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.

DECISION TO ATTEND STUDY

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.

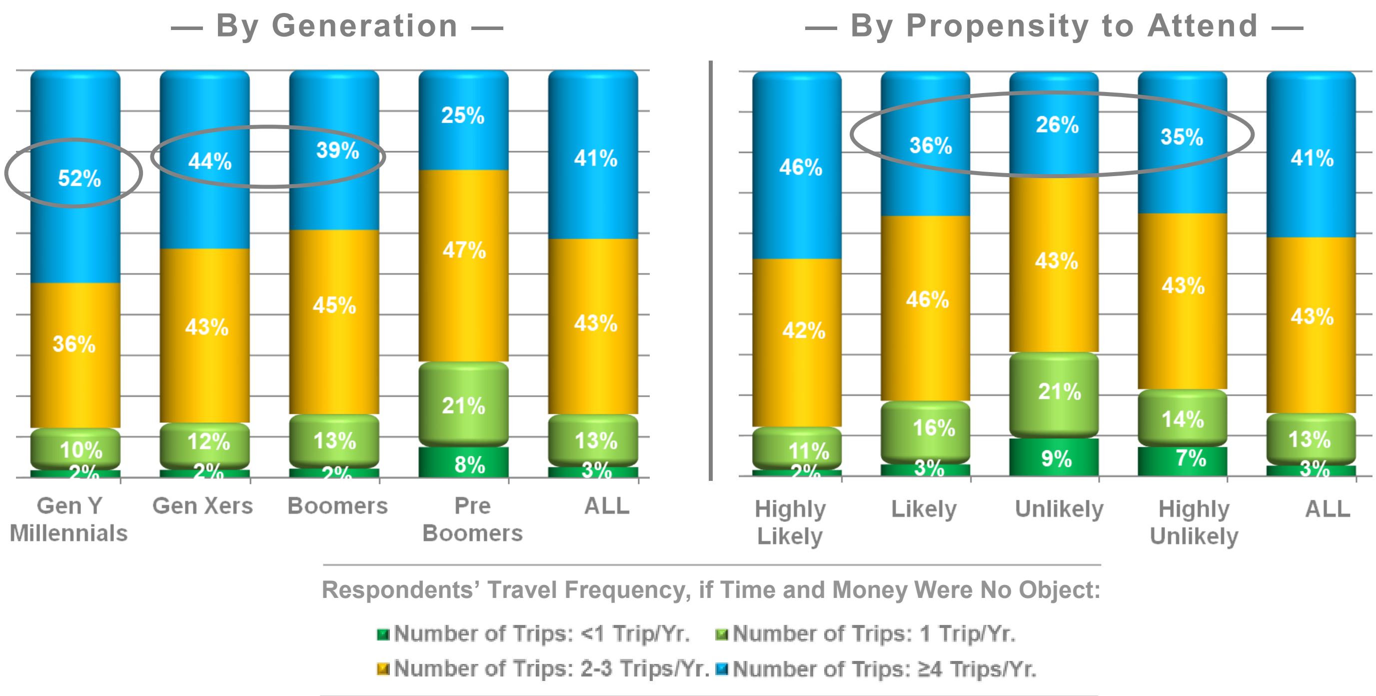
This parallels the aforementioned finding that if the overall destination / experience is positive, 79% will be likely to consider returning for leisure and 85% are likely to repeat attendance in that destination / city. In short, meetings matter.

The propensity to travel is not a barrier.

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

Travel Propensity Impact on Attendance



Are They Not Attending, Because They Don't Travel?

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.

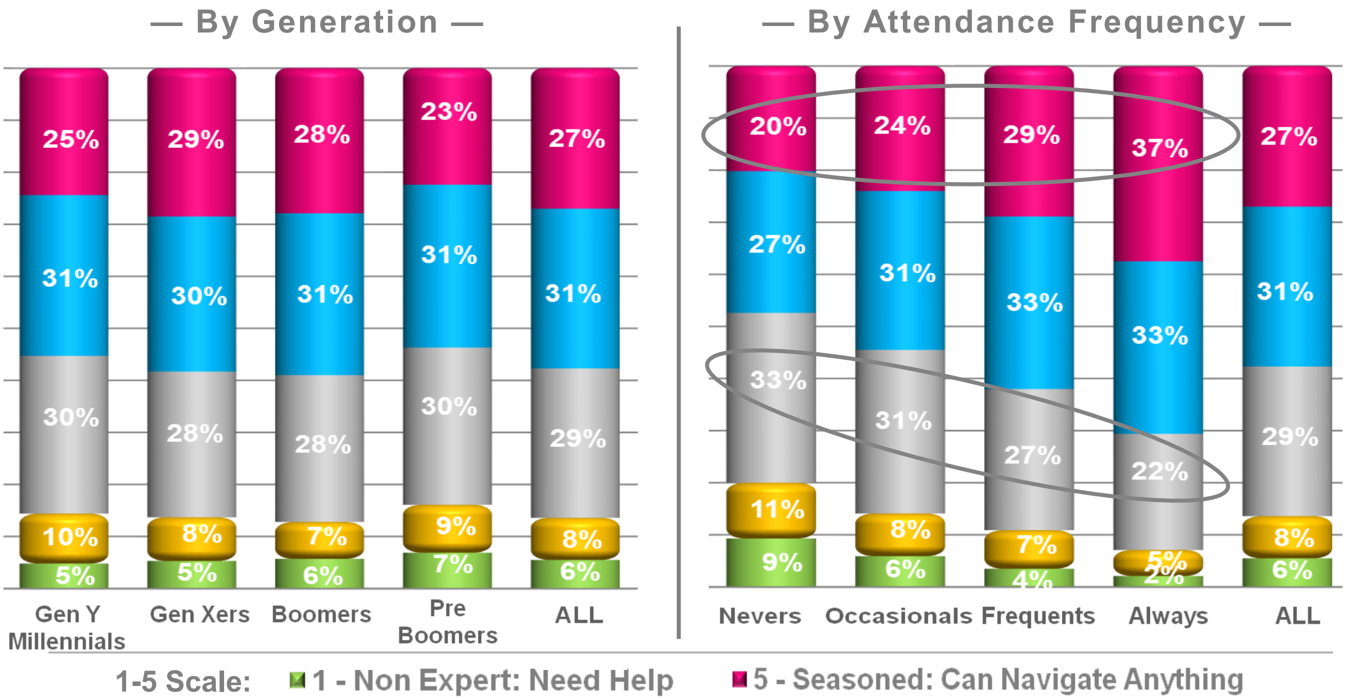
The data clearly show that a propensity to travel is not a barrier to the decision to attend. However, more research is needed in this area.

DECISION TO ATTEND STUDY

Today's attendees have a significant level of travel expertise. Still, some need help.

ATTENDEES AS CONSUMER$

Travel Expertise Impact on Attendance



Helping Them Get to the Event May Increase Your Margins.

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.*

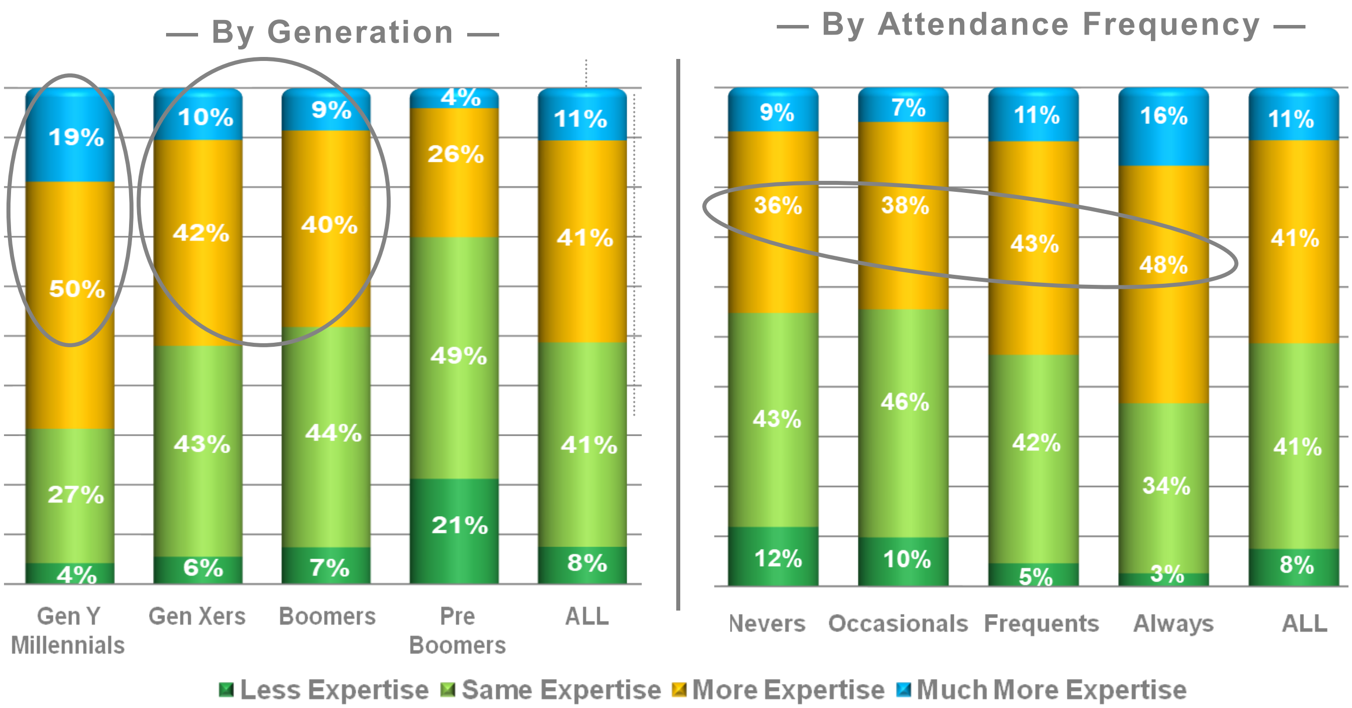
Bottom line, offering travel assistance or helping them 'navigate' their way to the destination not only shows you care, but also may increase attendance at the 'margins'.

Attendee level of travel expertise is maintaining or increasing — a good sign for the future.

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

Change in Travel Expertise



Level of Travel Expertise is Increasing.

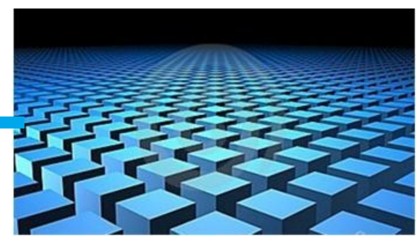
The level of change in travel expertise was also evaluated, with 41% of all respondents saying it's *About the Same*, while 52% reported they have *More* or *Much More* expertise than five years ago, up slightly from the 2014 survey.

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.

APPENDIX

Segments & Methodology

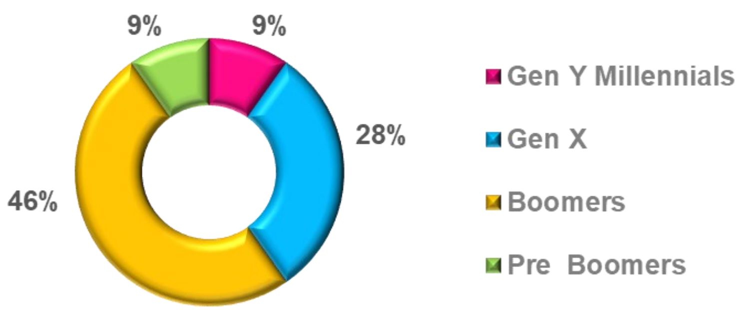


Survey Segments

Total Responses: 8,992

DECISION TO ATTEND STUDY

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 Xers
Born 1965-1979
Age 38-52
2,475 — 28%

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

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

Survey Segments

Total Responses: 8,992

DECISION TO ATTEND STUDY

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

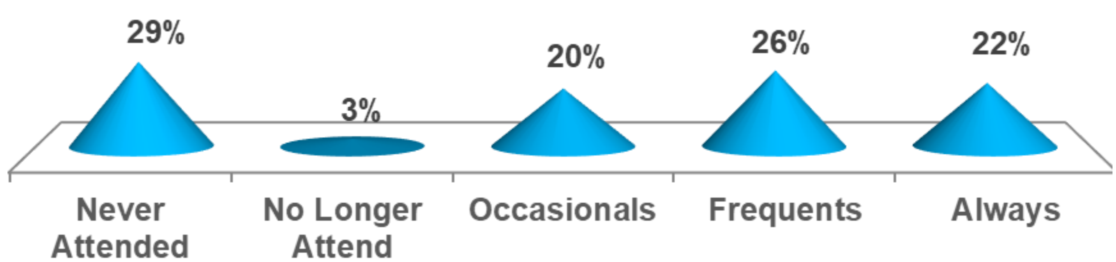
The FREQUENTS
2,376 — 26% Attend Every 2-5 Years

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.



Survey Segments

Total Responses: 8,992

DECISION TO ATTEND STUDY

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 / F_2F.

The UNLIKELYS

279 — 3% Highly Unlikely

I prefer not to attend conventions / exhibitions

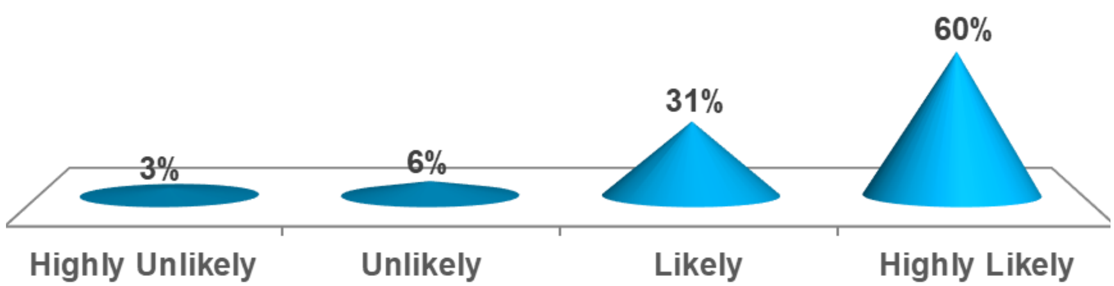
537 — 6% Unlikely

The LIKELYS

2,797 — 31% Likely

5,379 — 60% Highly Likely

I like to attend conventions / exhibitions



Total Responses: 8,992

DECISION TO ATTEND STUDY

Methodology

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.**

THE EXPERIENCE INSTITUTE®

Industry Collaboration

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.
TheExperienceInstitute.org

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.
DestinationsIntertnational.org

Thank You for Fueling the Vision.

THE
DECISION TO
ATTEND STUDY
FOR CONVENTIONS & EXHIBITIONS

DETERMINE BEHAVIORS ● MAXIMIZE ATTENDANCE

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