THE

DECISION TO ATTEND STUDY

FOR CONVENTIONS & EXHIBITIONS

AN EXAMINATION OF THE BEHAVIORS BEHIND THE DECISION TO ATTEND

PHASE ONE REPORT — JANUARY 2015

A COLLABORATIVE INITIATIVE:

Report Contents

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TheExperienceInstitute.org

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Executive Summary

THE DECISION TO ATTEND STUDY
FOR CONVENTIONS & EXHIBITIONS

PHASE ONE REPORT

January 2015

Total Responses: 7,171

Introduction

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.

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 DMOs is generating positive word-of-mouth by attendees, resulting in repeat bookings and increased attendance.

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

- 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 research study is to first gain new behavioral insight on attendees as 'consumers', with special needs and preferences. Then, use this insight to develop new industry strategies to maximize attendance — together.

We encourage your participation in this important vision. Thank you!

Mickey

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Deborah

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Acknowledgements

Participating Organizations

Special thanks to the following organizations that disseminated the Phase One, *Decision to Attend* survey, resulting in 7,171 responses.

American Bankers Association ● American College of Obstetricians & Gynecologists ● American Society of Civil Engineers ● Association of Equipment Manufacturers ● International Association of Administrative Professionals ● International Association of Fire Chiefs ● National Association of Broadcasters ● National Automobile Dealers Association ● TESOL International Association ● Unitarian Universalist Association

DECISION TO ATTEND STUDY

Research Sponsors

Special thanks to the following destinations that generously supported the research.

—Platinum Sponsors—

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Study Phases

PHASE ONE

This *Decision to Attend Study — Phase One,* published late January 2015, is designed as a desktop reference and is the first in a series of reports that focus on the myriad of behavioral and societal factors that comprise the reasons individuals decide to attend — or not attend — conventions & exhibitions.

It takes responses from 7,171 prospective or current attendees and establishes a baseline from which to continually measure the influencers and barriers to attending.

PHASE TWO

Throughout 2015, *Phase Two* will involve gathering input from both sides of the industry — meeting & exhibition professionals and DMOs / Suppliers — through chapters, surveys, sessions, articles and webinars.

The goal is to go beyond the traditional 'group profile' by industry or profession and develop an additional 'behavioral profile' — a profile that would identify the needs, attitudes and preferences of prospective attendees. Beyond education, networking and staying abreast of their industry, this new 'behavioral profile' would capture the most important *influencers* to attending for that group, from which meeting & exhibition professionals and destination stakeholders can work together to shape attendance-maximizing strategies.

To give your insight, take the survey at:

DecisionToAttend.com

Executive Summary

A NEW WAY OF THINKING

Attendees are Valuable Visitor$

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, Internet society, that model needs to evolve.

It's time for new metrics on the value of attendees — beyond 'heads in beds'. Of the 7,171 respondents, one-half said they would be likely to extend their stay or turn their trip into a vacation — fueling additional room nights. Another one-half will bring someone with them *(friend, family, companion)* — multiplying the overall spend. And, three-quarters report they'll get 'out & about' while they're there, with *Gen Y Millennials* even higher at 85% — consuming the destination 'product'. Eight in ten will recommend the destination and convention / exhibition to others and three-quarters will consider returning to the destination for leisure travel, if the experience is positive — fueling leisure visitors.

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

That, and more, is what this *Decision to Attend Study* has revealed and what is outlined within this Phase One report.

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

The sale is made when the convention leaves.

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?

Connectivity & Revenue: A Mutual Goal

Maximizing attendance fuels two goals shared by both sides of the industry — *Connectivity and Revenue*. For exhibition organizers and meeting professionals, maximized attendance helps more individuals 'connect' with the host organization and its mission, while protecting and growing a solid source of revenue. For destinations, maximized attendance results in more people connecting to the destination experience — what makes it unique — and increases overall spending as attendees get 'out and about' and/or recommend the destination to others. Thus, it makes sense to work together to move the industry forward toward maximized attendance.

Actual to Aspirational

This Phase One report breaks down the respondents into three segments — *Attendance Frequency, Generation,* and *Propensity / Likelihood to Attend*. The ultimate goal is to use this information to move attendees farther up the continuum to a higher frequency of attendance — motivating the *Nevers* to *Occasionals,* the *Occasionals* to *Frequents*, and the *Frequents* to *Always* attendees. The willingness to attend is there, especially among the younger *Gen X* and *Gen Y* generations. As an industry, we need to work together to supply the means.

Continuous Study of Attendance Behaviors

Point-in-time research is not enough to keep pace with the changing behaviors of attendees. Ongoing refinement of the attendee profile, and continuous learning about their needs and preferences, is critical to maximizing attendance. The vision for Phase Two of this study is to identify a uniform, repeatable methodology that can monitor trends over time — to eventually help answer the question: *"Are my numbers improving? Can I do better? Or is this as good as it's going to get?"*

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Key Findings

I. PROPENSITY TO ATTEND AS ADULT LEARNERS

The Future of Face-to-Face is Strong

The Propensity to Attend is High Across All Generations. The will or *Propensity to Attend* is high. Nine in ten are likely to attend conventions / exhibitions — across all generations — with the younger *Gen X* and *Gen Y* generations trending strong at 94%. This bodes well for the future of face-to-face / F_2F. *(See p. 24)*

Attendees as Adult Learners

Younger Generations Are Replacing Older Generation Attendees. Another way of researching the *Propensity to Attend* was to look at the likelihood of continuing their education as adult learners. Asked whether they are participating in more or fewer workshops, seminars, conferences, conventions/exhibitions for their *personal* or *professional* learning, over two-thirds reported they were attending more or about the same, with only one-third attending fewer. As the older generations attend fewer events, the younger *Gen X* and *Gen Y* generations are filling the void. Bottom line, the numbers look strong for all generations with a good 'pipeline' of younger attendees on the horizon. *(See p. 25)*

The Propensity to Learn Impacts Attendance Frequency. Not surprisingly, the propensity to continue their *personal* or *professional* education is highest for the *Always* attendees at 82% attending more or about the same number. Even one-half of the *Occasionals* and nearly two-thirds of the *Nevers* reflect a propensity to continue their education — another positive sign for the future. *(See p. 26)*

92% are likely to attend, with younger generations trending strong.

DECISION TO ATTEND STUDY

Even the *Never* attendees reflect a desire to continue their education.

Key Findings

II. ATTENDANCE DRIVERS

DECISION TO ATTEND STUDY

Education, networking and the destination are the top attendance drivers.

Education & Staying Abreast

Education & Staying Abreast are Key Drivers.

Education *(program, content, speakers, exhibits)* is still a strong attendance driver and should remain a prominent part of the marketing message. Over 90% of respondents report it's important, regardless of attendance frequency or generation. Keeping up and staying abreast with their profession/industry is an equally important benefit to attending and matters to all generations combined at 91%, with *Boomers* and *Gen Xers* rating it the highest. ***(See pp. 27-28)***

Networking Opportunities

They Want Opportunities to Network & Make Connections.

Networking and making connections are important to 75% of all respondents, but most important to *Gen Y Millennials* at 84%, as they're building their base of contacts. The fact that it's important to over two-thirds of all attendees warrants including it in both promotional messaging and determining how to best facilitate a variety of ways to 'get them together' on-site. ***(See p. 29)***

Destination / Location

The Destination / Location is Significant.

A remarkable 82% of all respondents report that the destination definitely factors into their decision. In stark contrast, only 57% of the *Always* attendees are influenced by location — they'll attend wherever. A remarkable 90% of the *Never* and *Occasional* attendees also say the destination matters. Generationally, the location matters slightly more to *Pre Boomers* who generally have the 'free will' to attend. Write-in comments ran the gamut from destination appeal, to airlift, to drivable distance, to overall cost, to experiencing 'new places'. Knowing that the *Occasionals* and *Nevers* also value education and networking, the destination/location may be the impetus to get them to attend. Converting these two groups to a higher frequency of attendance is key to improved profit margins. ***(See p. 30)***

Key Findings

ATTENDANCE DRIVERS

DECISION TO ATTEND STUDY

Opportunities to engage with others via social media are less important than face-to-face interactions.

Social Interactions

Attendees Socialize, but Less So on Social Media.

Beyond networking and making connections, nearly 71% of respondents indicated a strong desire for opportunities for *social interaction and discussions* while attending. Surprisingly, opportunities to engage with others via *social media* as a benefit of attending was rated relatively low at 40% *Important / Very Important* for all respondents combined. Creating and *promoting* face-to-face / F_2F, on-site opportunities may tip the scale toward the decision to attend. *(See p. 31)*

Attendees Will Search Local Websites & Social Media.

Seven in ten will search local websites to see what the destination is about and nearly one-half will search social media and review sites to learn what others are saying about the destination experience.

What type of impression will they get? Will they easily find what they are seeking? Both can influence their experience and overall image of the destination. And, their decision to attend, or not. *(See p. 32)*

Key Findings

III. ATTENDEES AS CONSUMER$

DECISION TO ATTEND STUDY

Extended Stays / Bringing Others

Attendees Fuel Spending

Attendees Extend Their Stay / Vacation. **Attendees turn into leisure travelers, with over one-half indicating they would extend their stay or turn their trip into a vacation — fueling additional room nights.**

Attendees Will Bring Others. **Nearly one-half will bring someone with them *(friend, family, companion)* — multiplying the overall visitor spend.**

Attendees Get 'Out & About'. **Three-quarters report they would get 'out & about', with *Gen Y Millennials* even higher at 85%. They will consume the destination 'product', while forming opinions on the destination experience. They grow the visitor spend.**

Attendees extend their stay, bring others and get 'out and about'.

They grow the visitor spend.

Today's attendees are consumers and should be valued in a new light. The 'peak night' room block metric needs to evolve — beyond 'heads in beds' to a new metric that values this dynamic — a metric that reflects the 'behavioral profile' including extended stays, bringing others, and their 'overall spend' while they're there. ***(See pp. 33-34)***

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Key Findings

ATTENDEES AS CONSUMER$

Return / Recommend Intentions

Repeat Attendance

The Destination Experience Impacts Repeat Attendance.

Every person attending is a potential repeat attendee. If the destination experience is positive, 84% are likely to return to attend the *same* meeting/convention/expo at that destination, with over three-quarters likely to return to attend a *different* one. The overall destination experience that happens 'outside the walls' definitely matters. ***(See p. 35)***

DECISION TO ATTEND STUDY

Repeat Visits

The Destination Experience Fuels Repeat Visits.

The overall destination experience also fuels future visits. If the destination experience is POSITIVE, over three-quarters of attendees will consider returning for leisure travel. But if it's NEGATIVE, only 4% are likely to return for leisure travel, underscoring the need to view the attendee with a 'leisure traveler' lens. Bottom line, they attend on someone else's dime and return on their own dime, which is significant. ***(See p. 35)***

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

Key Findings

ATTENDEES AS CONSUMER$

Return / Recommend Intentions

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

The sale is made when the convention leaves.

Recommend Intentions

Attendees Will Recommend the Convention / Expo *and* the Destination.

If a CONVENTION / EXHIBITION met or exceeded their expectations, a remarkable 85% are likely to recommend it to others, with two-thirds being *Very Likely* to do so.

The same is true for 83% who report they will recommend the DESTINATION to others, if their expectations are met or exceeded.

Again, this shows the sale isn't made when the convention is booked. The sale is made when the convention leaves.
(See p. 36)

DECISION TO ATTEND STUDY

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Key Findings

ATTENDEES AS CONSUMER$

Communicating Experiences

Communicating Their Experiences

Attendees Will Tell Others About Their Positive or Negative Experience.

Nine in ten reported they will tell others *(peers, friends, family, etc.)* about a POSITIVE destination experience, with over one-half telling others of a NEGATIVE destination experience. Bottom line, thousands of attendees are talking to others — year-over-year. What are they saying? Do you know? More important, what actions are being taken destination-wide to address the negatives for future attendees? ***(See p. 37)***

Preferred Methods of Communication

How Attendees Tell Others Varies by Generation.

Having a face-to-face conversation was rated above 90% across all generations as the preferred method of communication in recommending or telling others about their positive or negative experience. Below that, the usage of E-mail, Facebook, Phone and Text are among the top five for all generations, with minor variances. With regard to social media for all respondents, Facebook was rated at 45% as the preferred method of communication over LinkedIn at 12% and Twitter at 10%, with Twitter reaching a high of 61% for *Gen Y Millennials.* Prospective attendees will most likely heed these communications from their peers when making the decision to attend. ***(See p. 38)***

DECISION TO ATTEND STUDY

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?

Key Findings

ATTENDEES AS CONSUMER$

Satisfaction Expectations & Feedback

Eight in ten will give feedback on their experience, if it's quick and easy.

Giving Feedback on Satisfaction

Attendees Will Give Feedback on Both the Convention/Expo and 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. Eight in ten respondents indicated they would be likely to provide feedback through an online or mobile survey, if it were quick and easy to do so. Regarding satisfaction with the CONVENTION / EXHIBITION EXPERIENCE, 86% are *Likely* to give feedback, with nearly one-half being *Highly Likely*. The same holds true for satisfaction with the DESTINATION EXPERIENCE, where 80% reported the likelihood to give feedback, with 43% *Highly Likely* to do so. Determining the best method to capture this feedback both *consistently* and *strategically* is important to ascertain what attendees are saying about their satisfaction with the experience. From this knowledge, future strategies can be established. ***(See p. 39)***

Destination Experience Expectations

Attendees Have High Expectations About the Destination Experience.

In thinking about the destination experience, three-quarters rated all of the following as *Important* or *Very Important*, in descending order: Transportation Options; Safe; Clean; Way-finding; Welcoming / Friendly; Service-Oriented; and Variety of Things to See & Do. Generationally, the most significant variations came from the *Gen Y Millennials* who gave lower importance ratings to *Clean, Safe* and *Service-Oriented*, but higher ratings to *Transportation Options* and *Variety of Things to See & Do.* This parallels *Gen Y's* propensity to get 'out and about'. ***(See p. 40)***

DECISION TO ATTEND STUDY

Key Findings

ATTENDEES AS CONSUMER$

Travel Expertise / Frequency

Today's attendees have a high propensity to travel and significant expertise.

Yet, some need help.

Travel Frequency

Today's Attendees Have a High Propensity to Travel.

Overall, the *Propensity to Travel* is very high among the respondents with 87% reporting they'd take 2-4 trips/year, if time and money were no object. While the willingness to travel is not a barrier, overall costs are still significant and write-in comments reflect that travel distance is often a factor. ***(See p. 41)***

Travel Expertise

Attendees Consider Themselves 'Seasoned' or 'Expert' Travelers.

In evaluating the level of travel expertise, over 60% of all respondents consider themselves 'Expert' or 'Seasoned' travelers *(4-5 on a scale of 5)* who are able to 'navigate just about anything', with little variance between generations. However, variance occurs when analyzing by attendance frequency, with 72% of the *Always* vs. 49% of the *Nevers* indicating they are expert / seasoned. The level of travel expertise is also increasing, with over one-half reporting they have more expertise than five years ago.

DECISION TO ATTEND STUDY

Yet, for 20% of the *Nevers*, they say they need help. Offering travel assistance or helping them 'navigate' their way to the destination not only shows you care, but also may move them up the continuum to a higher frequency of attendance. ***(See pp. 42-43)***

Key Findings

IV. THE DECISION PROCESS

DECISION TO ATTEND STUDY

Who Makes the Decision?

For One-Quarter Someone 'Higher Up' Makes the Decision

For nearly three-quarters of all respondents, the decision to attend is theirs to make. For the other one-quarter, their boss or 'higher up' makes the decision, which is even higher for the younger *Gen X* and *Gen Y* generations at 35%. *(See p. 44)*

Barriers to Attending More Often

Prominent Barriers are Cost, Time and the Destination / City Appeal.

Cost: The overall cost of attending is rated as the highest barrier at 61% for all respondents, but highest for the younger *Gen X* and *Gen Y* generations. Respondents cited high and rising hotel rates, high registration fees, and overall travel costs as significant barriers. This also transcends for one-half who '*Can't Get Approval'*, with many citing cost as the overriding factor in the approval process.

Time: With regard to time, 41% indicated it's generally difficult to get away, rising to 58% for *Gen Y Millennials*. For another 23% of all respondents, the timing doesn't work for them.

Location: Location is the third barrier for all respondents, but is most important to those who are often on the 'bubble' — the *Occasionals, Frequents*, and *Pre Boomers* — reporting it is significant in their decision. *(See p. 47)*

Top barriers are cost, time and the destination appeal

It's important to identify and lessen the barriers.

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Key Findings

THE DECISION PROCESS

DECISION TO ATTEND STUDY

What Would Convince Them?

Less Than 10% Said 'Nothing' Would Convince Them.

When everyone but the *Always* attendees was asked what would help convince them to attend, only 8% said 'Nothing' — showing that they *can* be convinced with the right mix of incentives.
(See p. 48)

What Are the Influencers?

Helping Younger Generations Now is Key.

When asked what would convince them to attend, across generations, cost and location were the highest influencers, with 60% indicating they desired '*Some Type of Discount or Subsidy to Help Defray Costs'*, followed by 37% who said, *'It's a Destination/ City I Want to Visit'*.

Not surprisingly, *Gen Y Millennials* reported needing the most help, favoring discounts or subsidies to defray costs at 77% and on-site coupons/discounts at 32%. One young respondent suggested installment payments for the registration fee.

Helping the younger *Gen X* and *Gen Y* generations attend now is key to the future. But with barriers of time and money, it's not enough to invite them to attend. It's bridging the gap between the *desire* to attend and the *ability* to attend. Collectively, as an industry, we have to both *convince* them and *help* them.
(See p. 48)

It's bridging the gap between the *desire* to attend and the *ability* to attend.

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

Key Findings

DECISION TO ATTEND STUDY

THE DECISION PROCESS

Frequency of Attendance

Many Will Attend, Eventually.

The percentages of the *Nevers* (have never attended) steadily decrease over time. This is reflected by 36% of *Gen Y Millennials*, 27% of *Gen Xers,* 20% of *Boomers*, and 12% of *Pre Boomers* reporting they have never attended the largest convention/exhibition of the organization that sent them this survey. This demonstrates they will attend, over time. Getting the younger generations to attend sooner in their careers is important. It's also important to ensure they repeat attendance, once you succeed in 'getting them there'. *(See p. 45)*

Getting them to attend earlier in their career is key.

Overall, 65% would attend more often, with Gen Y even higher at 79%.

Nearly Two-Thirds Would Attend More Often.

If circumstances allowed, nearly two-thirds or 65% of respondents reported they would attend more often. Responses varied by generation, from *Gen Y Millennials* at 79% and *Gen Xers* at 71%, to *Boomers* at 63%, and *Pre Boomers* at 46%. By attendance frequency, there was a relatively even distribution of those saying they'd attend more often, with 25% for each of the four segments — Nevers, *Occasionals*, *Frequents*, *Always*.

The mutual objective of exhibition organizers, meeting professionals, and destinations is to implement strategies to move them along this continuum — to a higher frequency of attendance. *(See p. 46)*

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Key Findings

THE DECISION PROCESS

DECISION TO ATTEND STUDY

When Do They Decide?

Eight in Ten Decide 2-6 Months Prior.

Overall, 84% decide to attend 2-6 months prior. The majority or 56% of all respondents report they *normally* complete the registration process 3-6 months prior, with an additional one-quarter deciding 2 months prior. Of the remainder, 7% decide within one month and 2% within 30 days. Interestingly, *Gen Xers* tend to plan ahead slightly more than the other generations, perhaps due to family obligations; whereas *Gen Y Millennials* register slightly later, due to simple procrastination or planning things they can do pre, during or post. Numerous write-in comments mentioned the need for easy access to and reminders of future dates and locations — several years ahead — to allow time to get it into their budgets and/or obtain approval to attend. ***(See pp. 49-50)***

Easy to access future dates and locations helps with budgeting and pre-approval.

Will They Stay in the Block?

Most Will Stay in the Official Room Block, but Gen Y Millennials Show Slippage.

Eight in ten prefer to stay in the official hotel(s), but 17% are unlikely to do so. Of the ones going 'around the block', two-thirds indicate they've always stayed elsewhere, while the other one-third report they used to book within the block, but are now staying outside the block. Cost was the highest rated reason for 71% of this subset, followed by 22% desiring a certain area of the city, 21% citing loyalty to hotel brand(s); and 20% preferring a non-hotel environment (condo, B&B, etc.). Not surprisingly, the *Gen Y Millennials* show higher percentages, due to cost sensitivity and decreased brand loyalty. These are important metrics to trend over time. ***(See p. 51)***

Most will stay in the block, for now.

MOVING FORWARD

DECISION TO ATTEND STUDY

Now that we have a good baseline of data to trend over time, the next step is to develop new strategies to maximize attendance — together.

Throughout 2015, *Phase Two* of this study will involve gathering input from both sides of the industry — meeting & exhibition professionals and DMOs / Suppliers — through chapters, surveys, sessions, articles and webinars.

The goal is to go beyond the traditional 'group profile' that often puts 'labels' on attendees by profession/industry, such as doctors, teachers, engineers, etc. We need to develop an additional 'behavioral profile' — a profile that identifies the needs, attitudes and preferences of prospective attendees as *individuals*.

Then, by matching the combined group and individual behavioral profiles to what the destination offers, new site selection and promotional strategies can be developed to maximize attendance.

That's the vision. We value your input and thank you for your involvement.

Mickey

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Key Findings

The Breakdown

THE
DECISION TO
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FOR CONVENTIONS & EXHIBITIONS

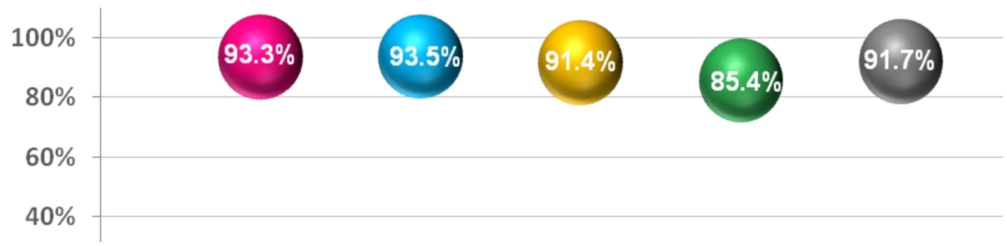
92% are likely to attend — with younger generations trending strong.

DECISION TO ATTEND STUDY

I. PROPENSITY TO ATTEND AS ADULT LEARNERS

The Future of F_2F is Strong

All Generations are Likely to Attend

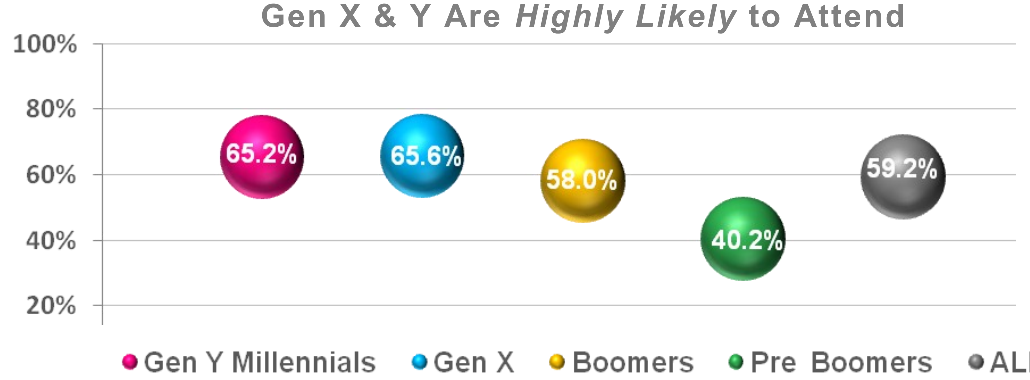


The Propensity to Attend is High Across All Generations.

Overall, the will or *Propensity to Attend* is 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 (91.7%) 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.

Of these, nearly two-thirds of Gen Y Millennials (65.2%) and Gen Xers (65.6%) report they are *Highly Likely* to attend conventions & exhibitions — higher than the older generations. Another good sign for the future.

Gen X & Y Are *Highly Likely* to Attend



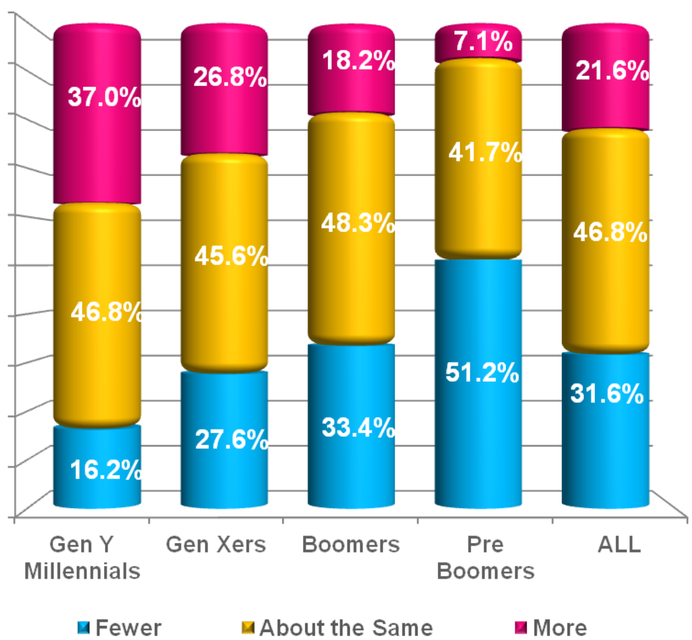
There's a good 'pipeline' of younger attendees who want to continue their education.

DECISION TO ATTEND STUDY

PROPENSITY TO ATTEND

Attendees as Adult Learners

Propensity to Continue their Education — By Generation —



Younger Generations Are Replacing Older Generation Attendees. Another way of researching the *Propensity to Attend*, was to look at the likelihood of continuing their education as adult learners, as shown on the following pages.

Respondents were asked whether they are participating in fewer, about the same, or more workshops, seminars, conferences, conventions/exhibitions for their personal or professional learning.

For *All* respondents, over two-thirds (68.4%) reported they were attending *More* (21.6%) or *About the Same* (46.8%) with less than one-third (31.6%) attending *Fewer.*

Not surprisingly, as the generations age, they are attending *Fewer*, ranging from *Gen Y Millennials* at 16.2% to *Pre Boomers* at 51.2%. Conversely, the younger generations are filling the void by attending *More* with *Gen Y Millennials* at 37.0% and *Gen Xers* at 26.8%.

The numbers look strong for all generations with a good 'pipeline' of younger attendees on the horizon.

DECISION TO ATTEND STUDY

Even the Never attendees reflect a desire to continue their education.

PROPENSITY TO ATTEND

Attendees as Adult Learners

The Propensity to 'Learn' Impacts Attendance Frequency.

Some interesting variables occur when comparing the two-thirds (68.4%) of *All* respondents who are attending *More* or *About the Same* number of workshops, seminars, conferences, conventions/exhibitions.

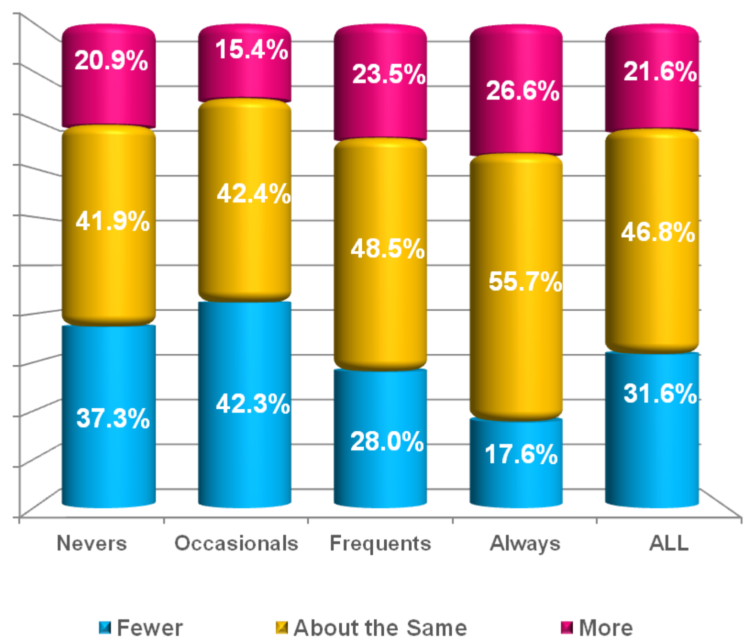
Not surprisingly, the *Always* attendees have the highest propensity to continue their education at 82.3% *More / About the Same* combined, followed by the *Frequents* at 72.0%.

Intuitively, you would think that the *Nevers* would have the lowest propensity to attend. However, the *Occasionals* were lowest at 57.8%, compared to the *Nevers* at 62.8%.

Additionally, the propensity to attend was not significantly impacted by who made the decision (themselves or someone higher up). They want to continue learning.

With the propensity to continue their education ranging from 57.8% to 82.3%, it's another positive sign for the future.

Propensity to Continue their Education
— By Attendance Frequency —



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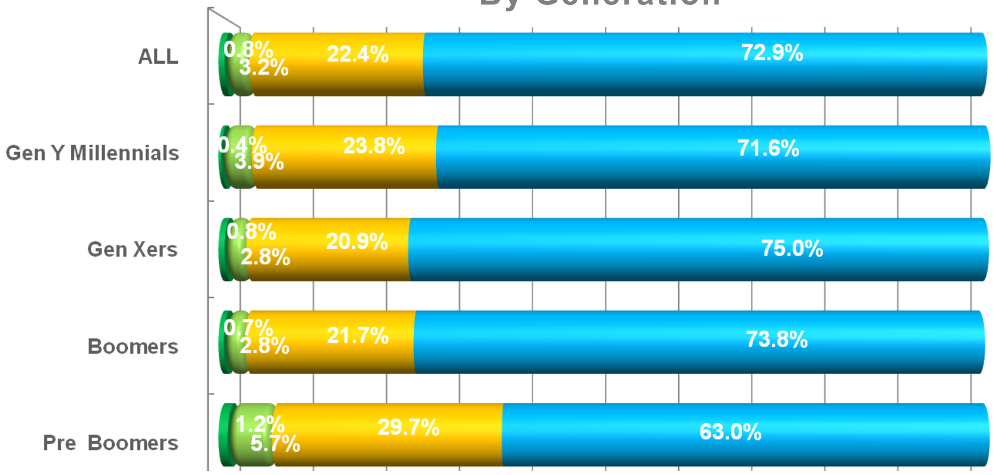
Education, staying abreast, networking and the destination are the top attendance drivers.

DECISION TO ATTEND STUDY

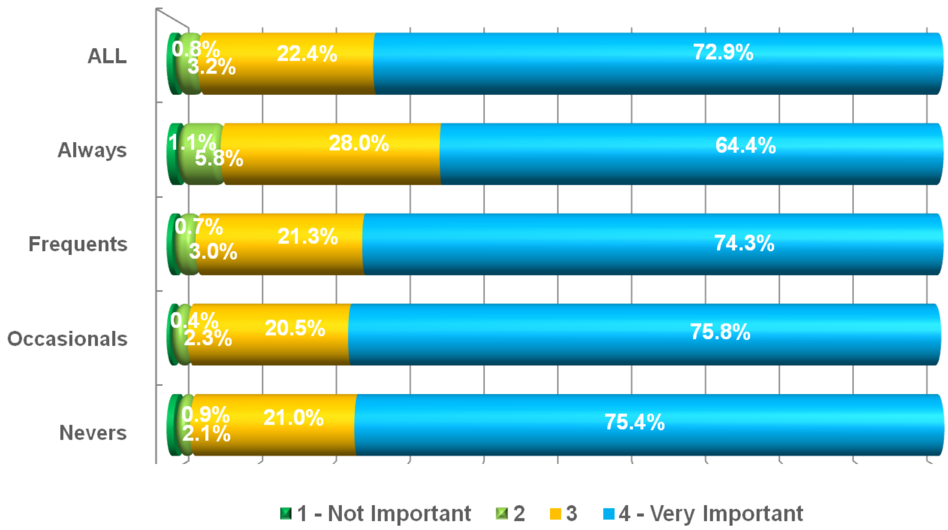
II. ATTENDANCE DRIVERS

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

— By Generation —



— By Attendance Frequency —



Content Matters.

Education is 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 (95.3%) of all respondents indicate education is *Important* or *Very Important* — across generations and attendance frequency. More strong numbers.

Of the *Very Important* responses, *Gen Xers* rated it the highest at 75.0% (top chart).

By attendance frequency (bottom chart), the *Always* attendee rated education slightly lower at 64.4% *Very Important*, as their other primary motivators are networking and staying abreast.

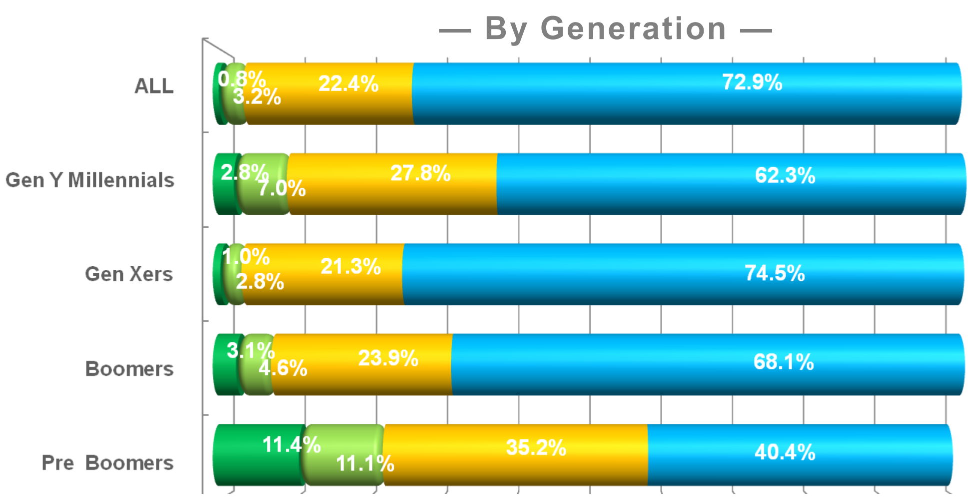
THE EXPERIENCE INSTITUTE®

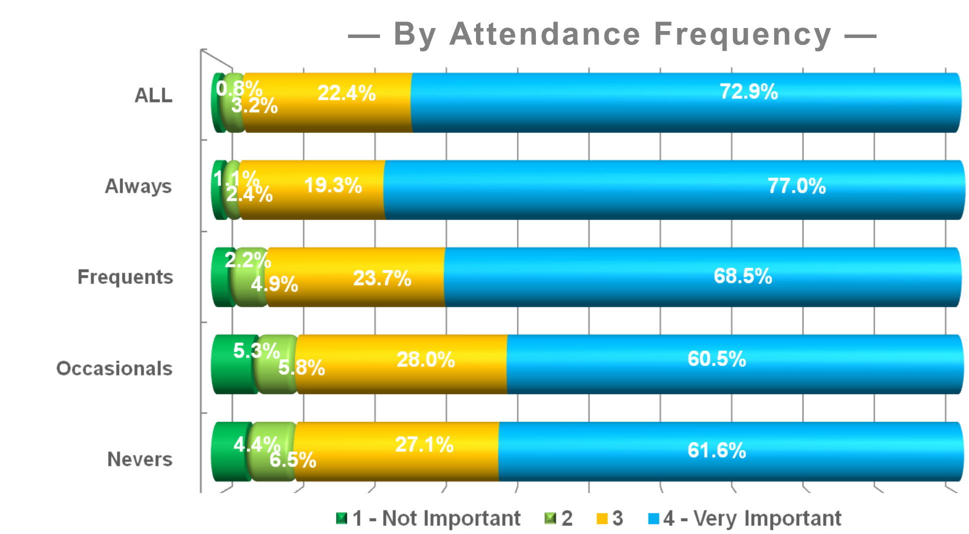
DECISION TO ATTEND STUDY

75% of Gen Xers see staying abreast of their profession or industry as very important.

ATTENDANCE DRIVERS

Keeping Up and Staying Abreast of Their Profession / Industry





Staying Abreast of their Profession or Industry is a Key Motivator.

Keeping up and staying abreast with their profession or industry is an important benefit to attending and matters to all generations combined at 95.3%.

Broken down, the two largest workforce categories lead the *Very Important* ratings with *Gen Xers* at 74.5% followed by *Boomers* at 68.1%.

Staying abreast also matters to all frequency of attendees (bottom chart), with the *Always* attendee rating it at 77.0% *Very Important*.

Surprisingly, even the *Occasionals* and *Nevers* rated staying abreast as *Very Important* at 60% — something to include in targeted messaging.

THE EXPERIENCE INSTITUTE®

DECISION TO ATTEND STUDY

Younger generations value opportunities to network and make connections.

ATTENDANCE DRIVERS

Opportunities for Networking & Making Connections

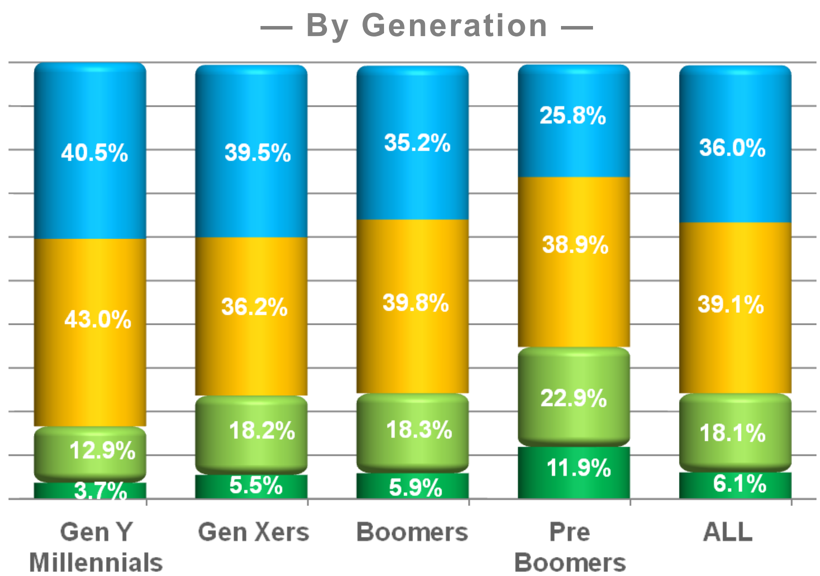
They Want Opportunities to Network & Make Connections.

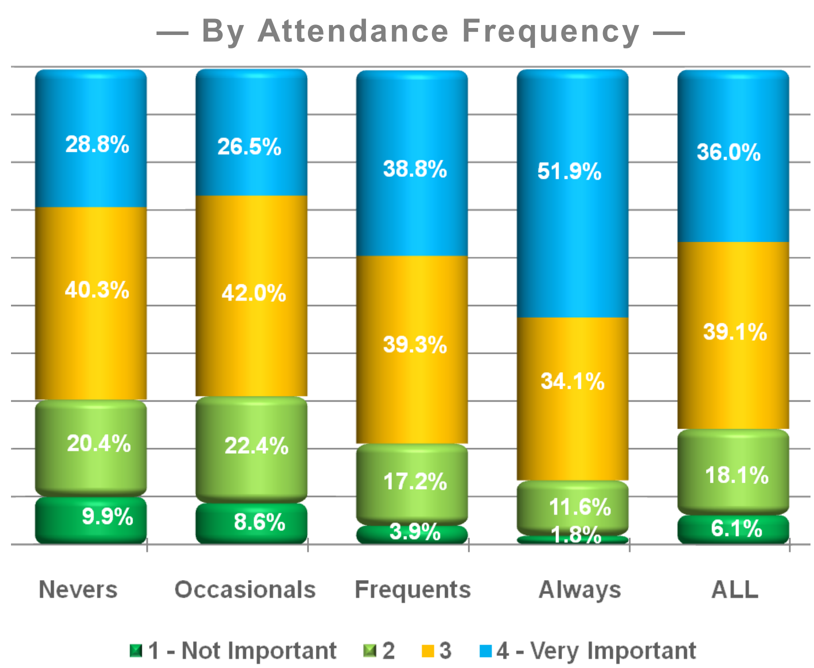
Although not rated as high as content and staying abreast as a benefit of attending, opportunities for networking and making connections are important to three-quarters (75.1%) of all respondents.

When combined, the percentages show slightly more importance to the younger generations, as they are still building their professional networks (top chart):

Gen Y Millennials - 83.5%
Gen Xers - 75.7%
Boomers - 75.0%
Pre Boomers - 64.7%

When analyzed by attendance frequency (bottom chart) the more frequent attendees rated it higher, with 86.0% of the *Always* attendees indicating it's important in contrast to the *Occasionals* at 68.5% and the *Nevers* at 69.1%. The fact that it's important to over two-thirds of all attendees warrants including it in promotional messaging and determining how to best facilitate 'getting them together' on-site.





DECISION TO ATTEND STUDY

For 80% of prospective attendees, the destination impacts their decision.

ATTENDANCE DRIVERS

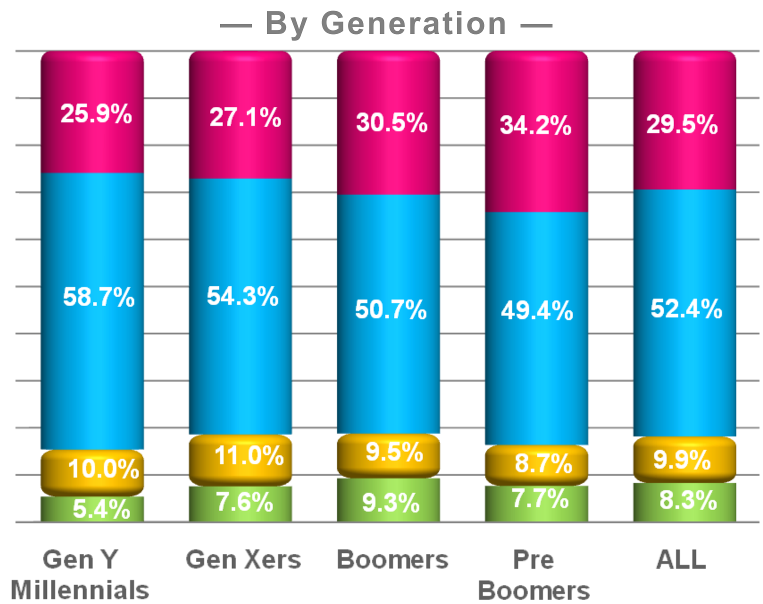
Importance of Destination / Location

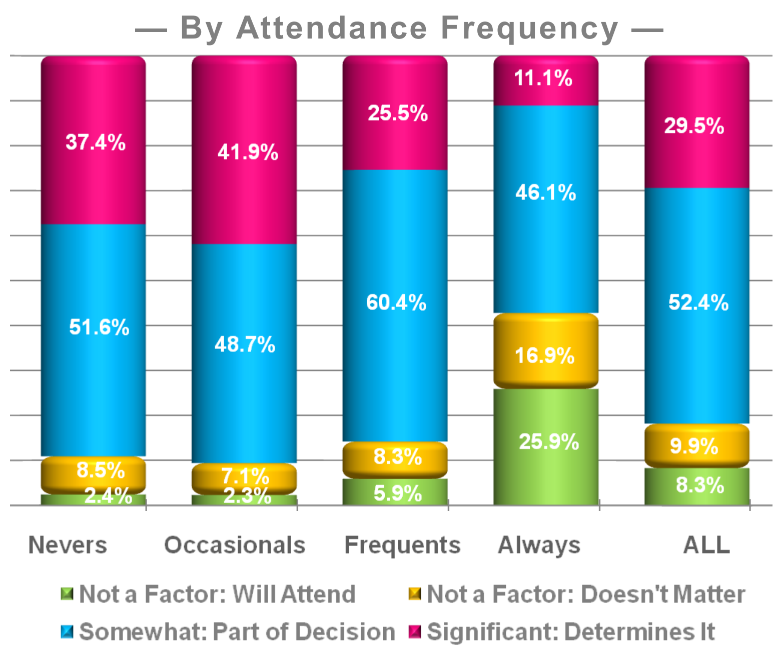
The Destination / Location Impacts the Decision.

A remarkable eight in ten (81.9%) of prospective attendees report that the destination/location factors into their decision. 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, one-quarter to one-third say it *'Determines It'* — that location determines whether they attend or not (top chart). Easy access to local information regarding planning what to do is *Important / Very Important* to 45.8% (not shown) of all generations and frequencies.

In stark contrast (bottom chart), only 57.2% of *Always* attendees say location matters — they'll attend wherever. This compares to a remarkable 90% of the *Occasional* and *Never* attendees who say the destination matters. 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 promotions. Converting them to a higher frequency of attendance is the goal.



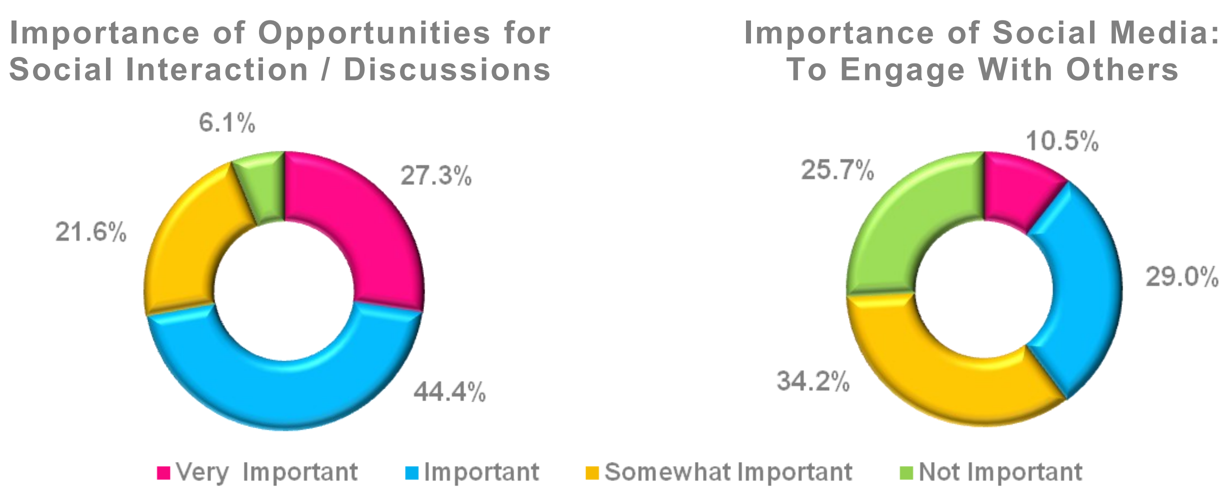


DECISION TO ATTEND STUDY

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

ATTENDANCE DRIVERS

Social Interactions



Opportunities for Social Interaction / Discussions Are Important to 70% of Attendees.

Beyond networking and making connections, 71.7% of all respondents considered the opportunity for social interaction and discussions an *Important / Very Important* benefit of attending.

Although there was little variation between generations (not shown here), *Gen Y Millennials* 74.8% and *Pre Boomers* 76.4% were slightly higher. By attendance frequency, the *Always* attendee rated it the highest at 79.8% *Important / Very Important*. Even the *Occasionals* were high at 67.6%.

Creating and *promoting* these face-to-face / F_2F opportunities 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 as a benefit of attending was rated relatively low at a combined 39.5% *Important / Very Important* for all respondents. There was little variation by generation, but there was a contrast between the *Always* attendee who rated it 46.4% *Important / Very Important* compared to the *Occasionals* at 33.8%.

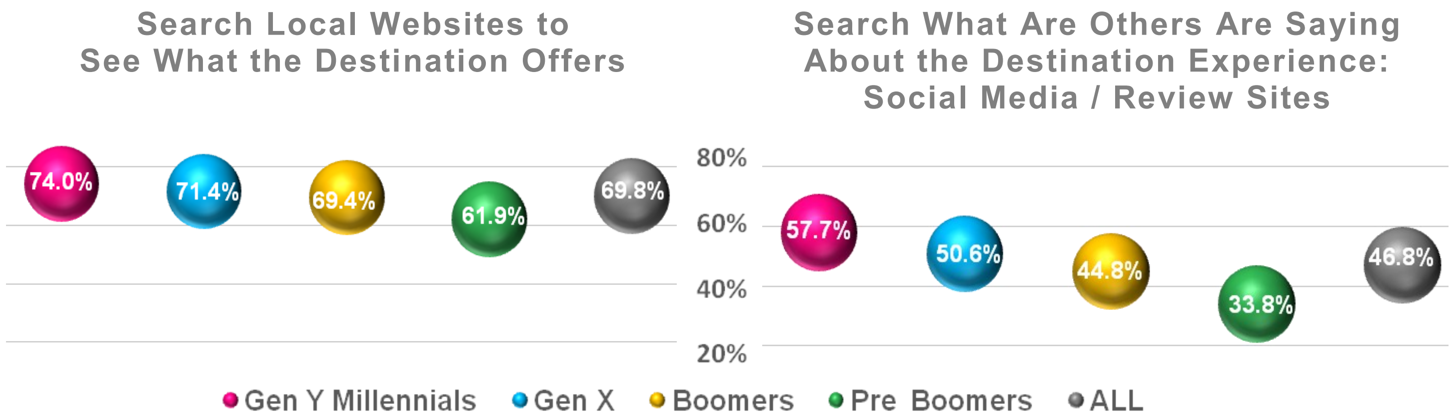
Social media interactions will always be important, but attendees at this point in time are clearly showing they prefer to talk and socialize with one another — face-to-face. More Important trends to monitor over time.

DECISION TO ATTEND STUDY

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

ATTENDANCE DRIVERS

Searching Local Websites & Social Media



70% Will Search Local Websites to See What the Destination Offers.

Seven in ten (69.8%) of all respondents will search local websites to see what the destination offers.

While there is little variation by attendance frequency, there is by generation. Not surprisingly, *Gen Y Millennials* at 74.0% are the most *Likely / Highly Likely* to do so, followed closely by the other generations.

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 Nearly 50% of Attendees.

They will access social media or travel review sites to see what others are saying about the overall destination experience. Nearly one-half (46.8%) of *All* respondents are *Likely* or *Highly Likely* to do so, with *Gen Y Millennials* in the lead at 57.5%. There was little variation by attendance frequency.

In a separate question (not shown herein), they were asked whether they would monitor what other *attendees* were saying about the destination and things to do. Overall, one-third (35.6%) of *All* reported they'd be *Likely / Highly Likely* to do so, with Gen Y Millennials the highest at 47.9%.

Important trends to monitor over time.

THE EXPERIENCE INSTITUTE®

DECISION TO ATTEND STUDY

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

III. ATTENDEES AS CONSUMER$

Extended Stays / Bringing Others

Extend the Stay	Turn Trip Into Vacation	Bring Others
50.1%	52.4%	47.6%

Attendees Will Extend Their Stay.

One-half (50.1%) of *All* respondents indicate they would be *Likely / Highly Likely* to extend their stay.

Attendees Will Turn Their Trip Into a Vacation.

Pre or Post-Vacation: One-half (52.4%) say they would be *Likely / Highly Likely* to turn the trip into a vacation, before or after the convention / exhibition.

Attendees Will Bring Others With Them.

Nearly one-half (47.6%) report they would be *Likely / Highly Likely* to bring someone with them — friend, family or companion(s).

Attendees turn into leisure travelers, with one-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.

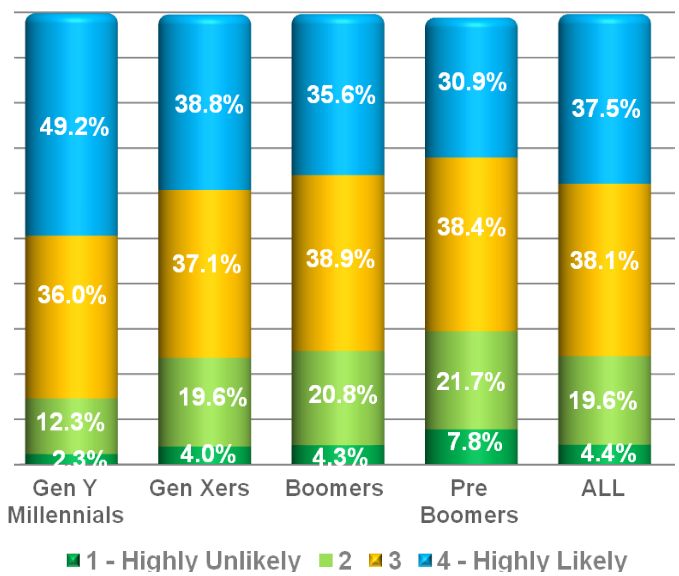
It's time for new metrics on the value of attendees — beyond 'heads in beds'.

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 Will Get 'Out & About'.

Three quarters (75.6%) of *All* respondents are *Likely* or *Highly Likely* to get 'Out & About' during the convention / exhibition. Although there is no significant variance by frequency of attendance, there is by generation with *Gen Y Millennials* the most likely to venture out at a combined 85.2%.

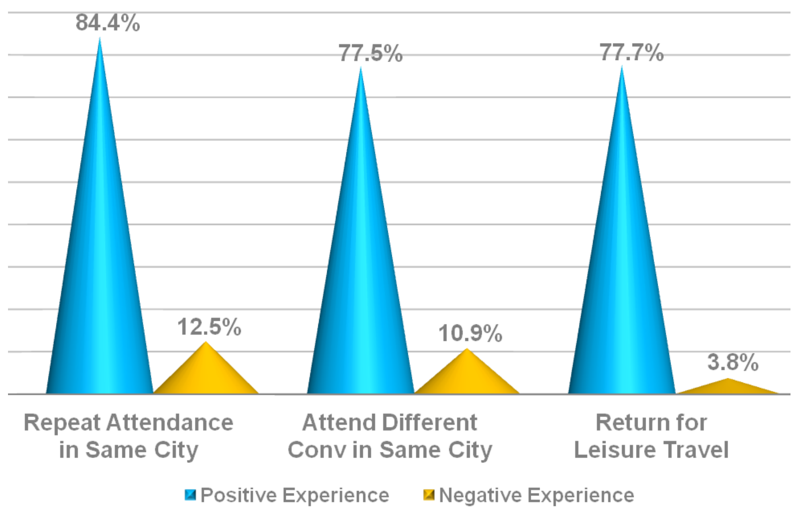
They will grow the visitor spend. They will 'consume' the destination 'product', forming opinions on the destination experience and the convention / exhibition experience.

DECISION TO ATTEND STUDY

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

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 destination experience is POSITIVE, 84.4% of respondents are *Likely / Highly Likely* to return to attend the *same* meeting/convention/ expo at that destination. It it's NEGATIVE, only 12.5% will return. And, over three-quarters (77.5%) are likely to return to attend a *different* one, with only 10.9% returning if it's negative — impacting annual destination attendance figures. While there are slight generational and attendance frequency variances, it's clear that the overall destination experience 'outside the walls' definitely matters.

The Destination Experience Fuels Repeat Visits.

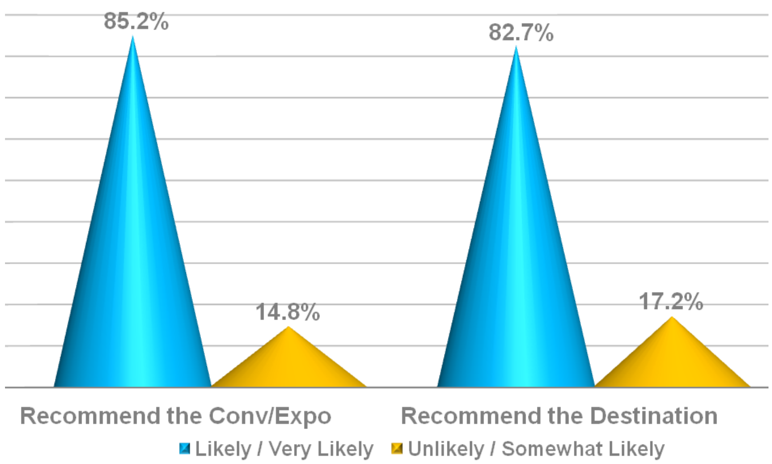
The overall destination experience also fuels future visits. The above percentages are from two separate questions querying the impact of a positive or negative destination experience. If the destination experience is POSITIVE, over three-quarters (77.7%) of attendees will consider returning for leisure travel. But if it's NEGATIVE, only 3.8% are likely to return, with a remarkable 86.2% unlikely to do so *(79.1% Highly Unlikely and 7.1% Unlikely)*. 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 their expectations, a remarkable 85.2% are *Likely / Very Likely* to recommend it to others, with no marked variances between generations or attendance frequency. And, over two-thirds (67.0%) are *Very Likely* to do so.

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

Similarly, if a DESTINATION / CITY met or exceeded expectations, 82.7% reported they are *Likely / Very Likely* to recommend the destination to others, with similar percentages across generations and frequency of attendance. Again, nearly two-thirds (63.3%) are *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.

THE EXPERIENCE INSTITUTE®

Attendees will tell others about their positive or negative experiences.

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

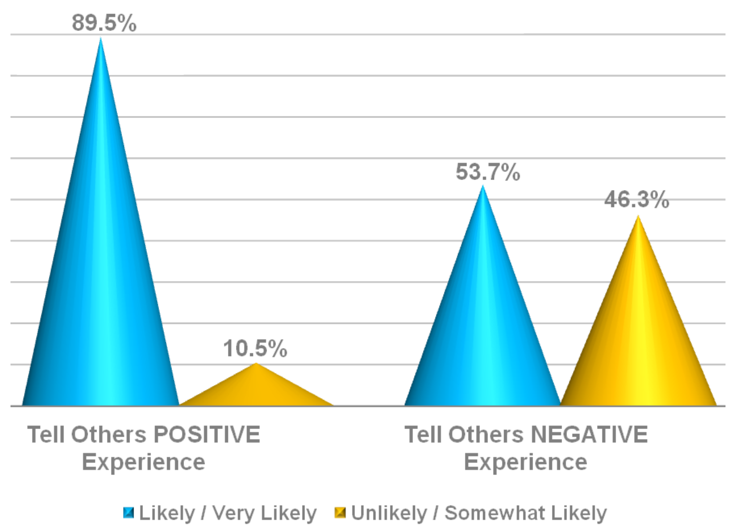
Communicating Their Experiences

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 (89.5%) reported they will tell others *(peers, friends, family, etc.)* about a POSITIVE destination experience, with over one-half (53.7%) telling others of a NEGATIVE destination experience. The only variances were generational, with the likelihood of telling others increasing slightly with each succeeding generation.

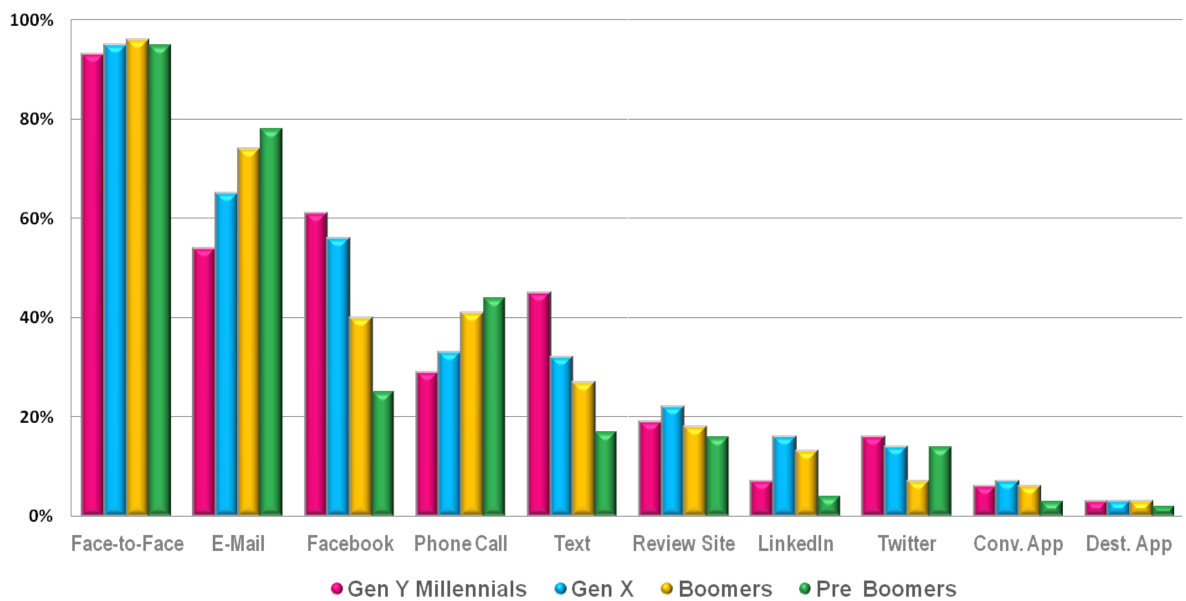
Bottom line, thousands of attendees are spreading positive or negative word-of-mouth — year-over-year. What are they saying? Do you know? More important, what actions are being taken destination-wide to address 'the negatives' for future attendees?

DECISION TO ATTEND STUDY

Over 90% of attendees that 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 they 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, some contrasts emerge. Interestingly, all four generations selected the same top five as their preferred method of communication averaging as follows: (1) Face-to-Face Conversation 95.4%; (2) E-mail 69.4%; (3) Facebook 45.0%; (4) Phone Call 37.7%; and (5) Text 29.6%. For social media, the average of all respondents put Facebook on top at 45.0%, with LinkedIn at 12.1% and Twitter at 9.5%. Not surprisingly, Facebook reached a high of 61.1% for *Gen Y Millennials.*

Prospective attendees will most likely heed these communications when making the decision to attend.

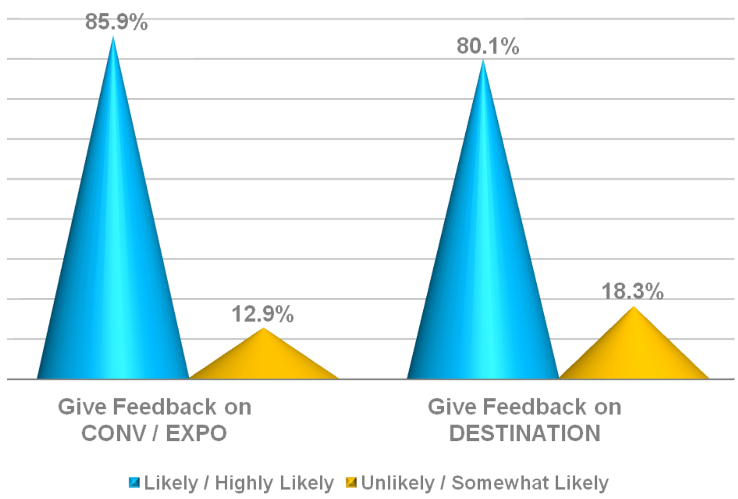
THE EXPERIENCE INSTITUTE®

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

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

Giving Feedback on Satisfaction



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.

To gauge behavior, respondents were asked: *"If it were quick & easy, how likely would you be to complete an online or mobile survey on your satisfaction with the overall CONVENTION / EXHIBITION EXPERIENCE and the DESTINATION EXPERIENCE?"* The results were positive, with little variance by attendance frequency or generation.

CONVENTION / EXHIBITION: Eight in ten (85.9%) are likely to provide feedback on their satisfaction with the convention / exhibition experience, with 47.8% *Highly Likely*.

DESTINATION: Similarly, eight in ten (80.1%) reported their likelihood to give feedback on satisfaction with the destination experience, with 42.7% *Highly Likely*.

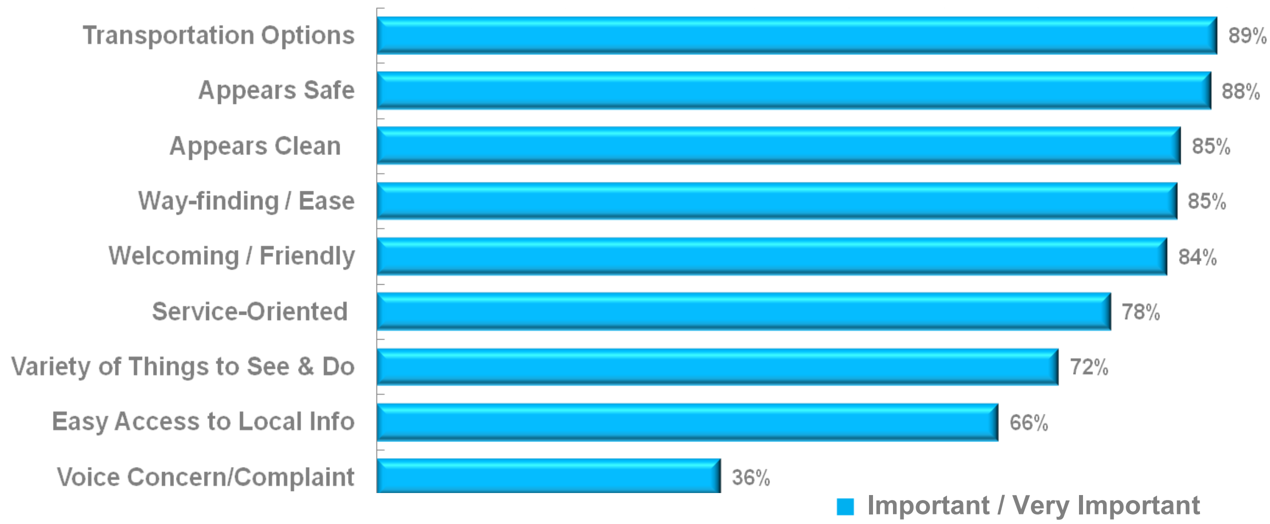
Determining the best method to capture this satisfaction feedback *consistently* and *strategically* is critical to ascertaining what attendees are saying about their experience.

DECISION TO ATTEND STUDY

Attendees have high expectations about the destination experience.

ATTENDEES AS CONSUMER$

Destination Experience Expectations



Attendees Have Expectations About the Destination Experience.

Respondents were asked to think about the destination / city experience and rate the level of importance of the nine factors above. All but one of the nine were ranked as *Important / Very Important* by over two-thirds of the respondents. In isolating only the *Very Important* ratings, *Appears Safe* was the highest at 52.7%, followed by *Transportation Options* at 47.7%.

There was little variation between frequency of attendance, but the *Never* attendees rated *Safe*, *Clean* and *Welcoming/Friendly* slightly higher than other respondents, which should be taken into consideration in promotional messaging.

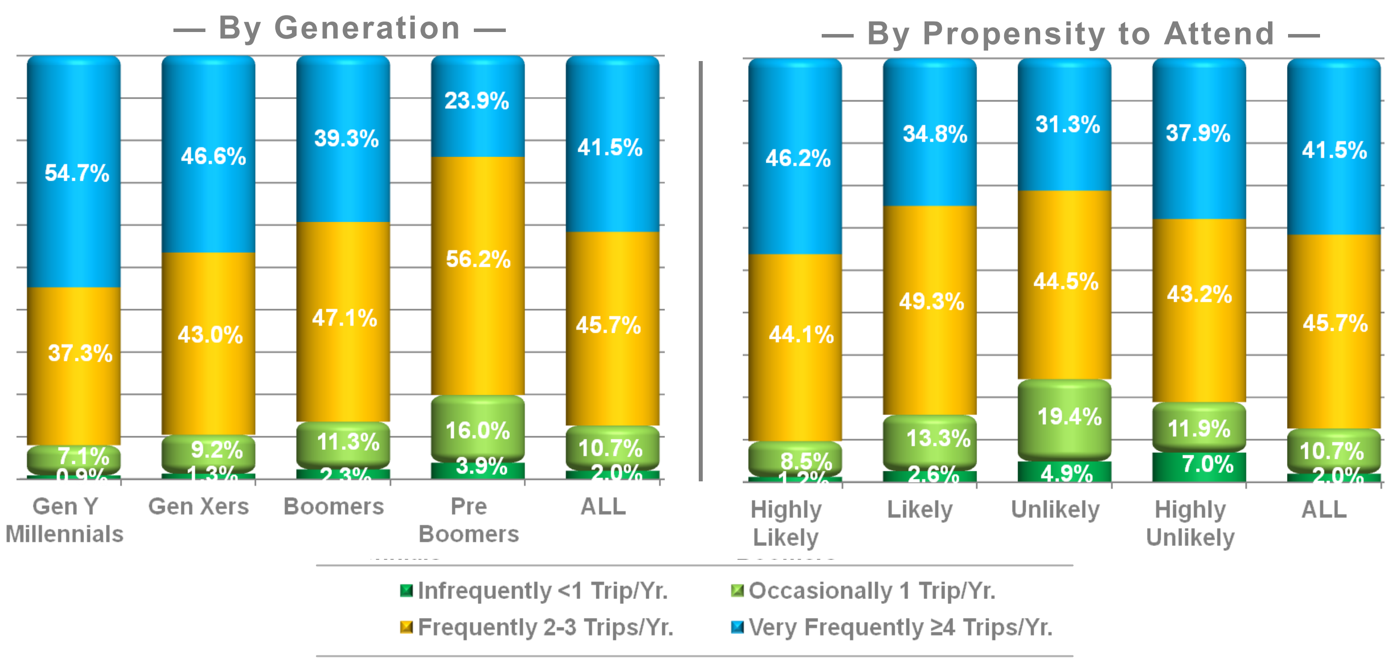
Generationally, the most significant variations came from the *Gen Y Millennials* who gave lower importance ratings to *Clean, Safe* and *Service-Oriented*, but higher to *Transportation Options* and *Variety of Things to See & Do.* This parallels Gen Y's propensity to get 'out and about', as earlier described..

The propensity to travel is not a barrier.

DECISION TO ATTEND STUDY

ATTENDEES AS CONSUMER$

Travel Frequency Impact on Attendance



Today's Attendees Have a High Propensity to Travel. Maybe they're not attending because they don't travel. Interestingly, that's not the case. 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 money and time were no object, nearly nine in ten (87.2%) reported they'd take 2-4 trips.

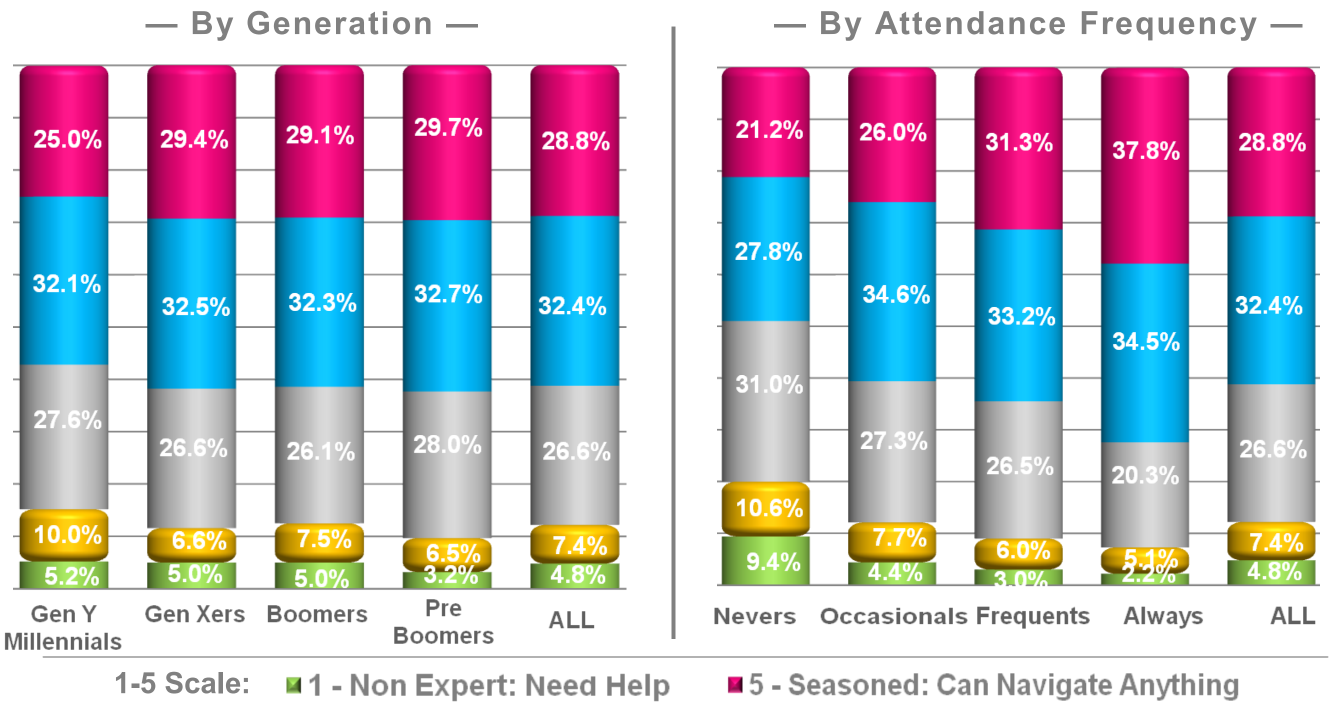
There was little variance by attendance frequency. By generation, however, the older generation *Boomers* and *Pre Boomers* are likely to take 2-3 trips/year vs. the *Gen Xers* and *Gen Y Millennials* preferring 4 or more trips/year. With regard to the third research segment of *Propensity / Likelihood to Attend*, this was one of the few indicators for this segment that was significant enough to mention. Surprisingly, those *Highly Unlikely to Attend were* at 37.9% for 4 or more trips/year, slightly less than those *Highly Likely to Attend* at 46.2%. This is an area where more research is needed, but for now, this clearly shows that they don't attend because they are not 'travelers'.

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



Attendees Consider Themselves 'Seasoned' or 'Expert' Travelers.

In evaluating the level of travel expertise and its impact on attendance, 61.2% of all respondents consider themselves 'Expert' or 'Seasoned' travelers (4-5 on a scale of 5) who are able to 'navigate just about anything'. While there were little variances by generation, interesting variances occurred when analyzing by attendance frequency. Nearly three-quarters (72.3%) of the *Always* attendees indicated they are expert / seasoned travelers vs. half (49.0%) of the *Nevers*. With regard to needing assistance, 20.0% of the *Nevers* say they 'need all the help they can get' vs. 7.3% of the *Always.*

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'.

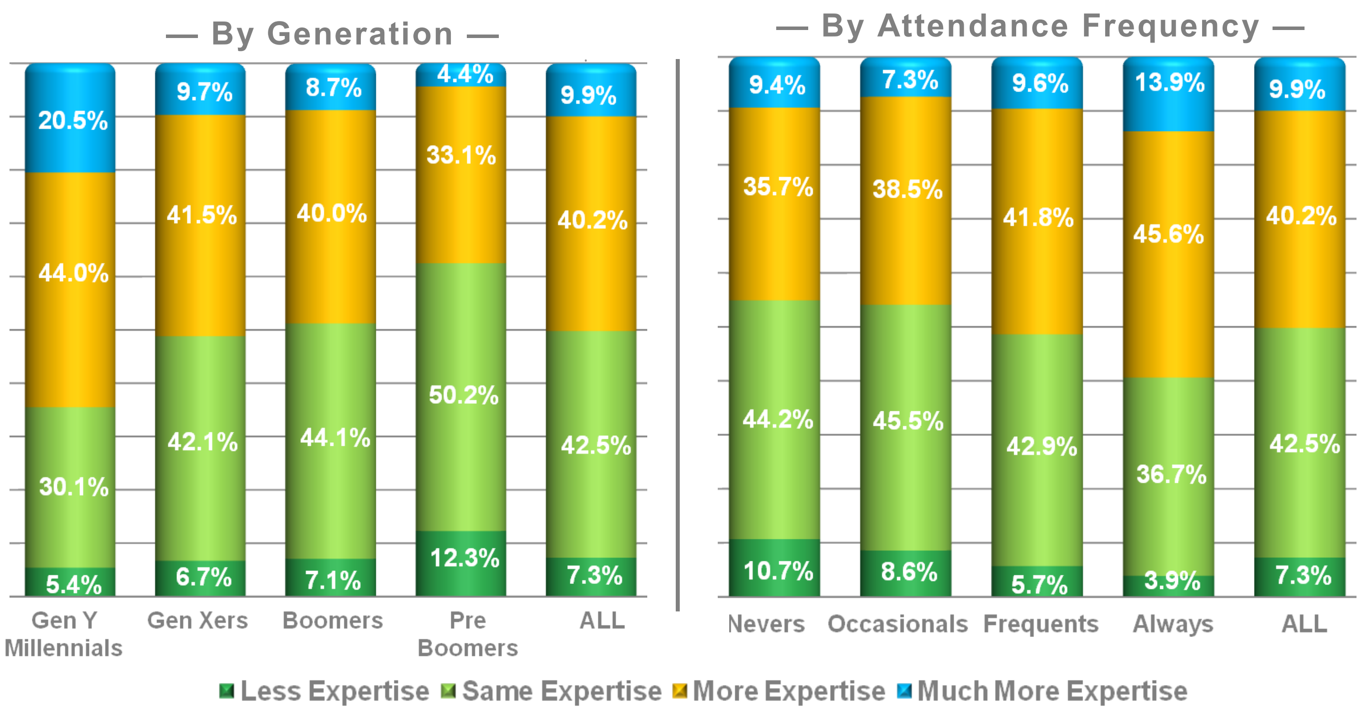
THE EXPERIENCE INSTITUTE®

Attendees' 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 Maintaining or Increasing.

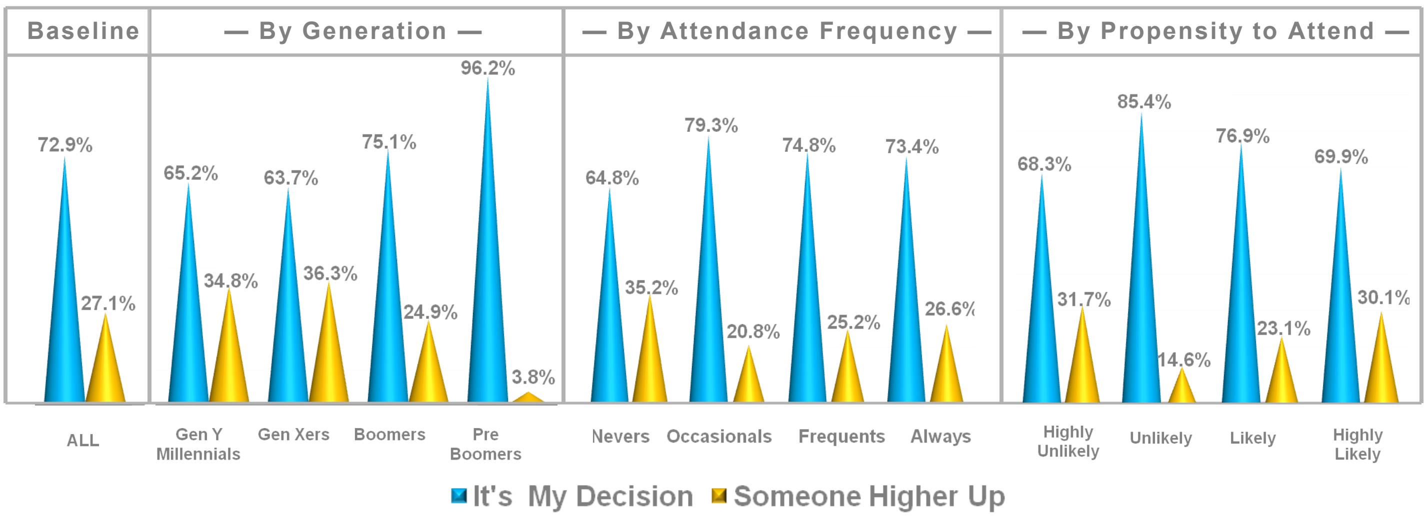
The level of change in their travel expertise was also evaluated, with 42.5% of all respondents saying it's *About the Same* while 50.1% said they have *More* or *Much More* expertise than five years ago. There was little variance in likelihood to attend. When evaluating frequency of attendance, 59.5% of the *Always* attendees report they have *More* or *Much More* expertise than five years ago vs. the *Occasionals* at 45.8%. Interestingly, by generation, the *Gen Y Millennials* have 20.5% *Much More* expertise compared to *Boomers* at 8.7% and *Gen Xers* at 9.7%. Trending this over time will be important.

DECISION TO ATTEND STUDY

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

IV. THE DECISION PROCESS

Who Makes the Decision



Getting Them to YES is Critical.

Is it their decision alone? For nearly three-quarters (72.9%) of all respondents, the decision to attend is theirs to make. For the other one-quarter (27.1%), it's their boss or 'higher up' who makes the decision. Yet when queried about barriers, interestingly, only 11.0% 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. Over one-third of *Gen Xers* (36.3%) and *Gen Y Millennials* (34.8%) don't make the decision on their own, contrasted to one-quarter of *Boomers* (24.9%), and only 3.8% of *Pre Boomers.*

By frequency, the *Occasionals* are a prime target. Surprisingly, they are making the decision on their own, with only 20.8% needing approval. When added to the fact that *Occasionals* are highly swayed by the destination / location, developing both the right match to their interests and targeting that message may convert this group into *Frequents*.

Another surprise was the *Propensity / Likelihood to Attend* segment. A remarkable 85.4% of the *Unlikelys* make the decision themselves — higher than those who frequently attend. Other questions revealed they 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.

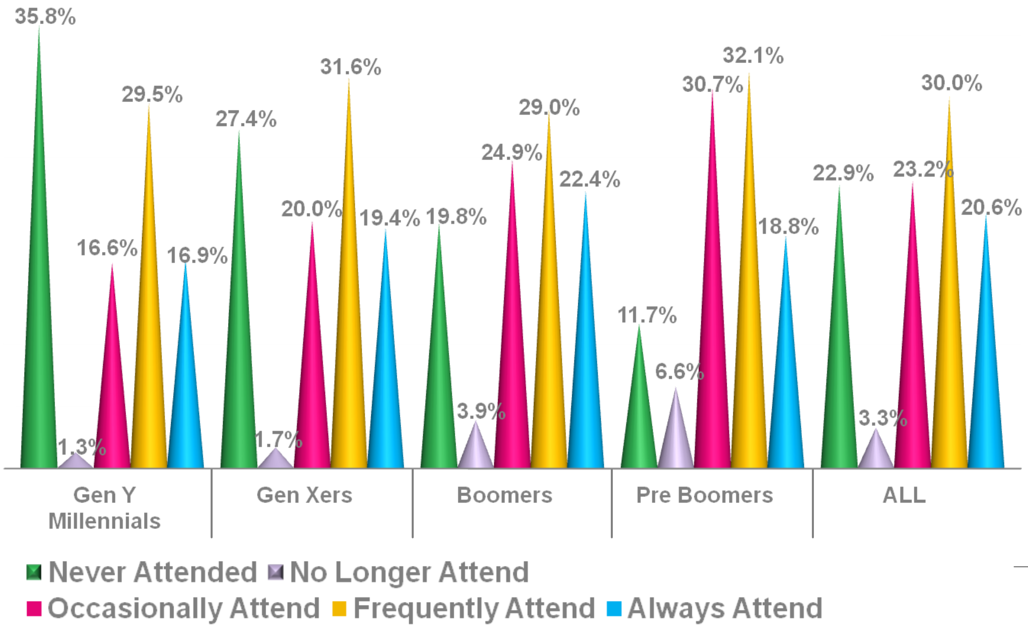
THE EXPERIENCE INSTITUTE®

Getting them to attend earlier in their career is key.

DECISION TO ATTEND STUDY

THE DECISION PROCESS

Attendance Frequency



Many Will Attend, Eventually.

Of *All* respondents, 22.9% report they have never attended the largest convention / exhibition of the organization that forwarded this online survey. And, only 3.3% say they attended in the past, but no longer attend. Yet, in looking at the *Never Attended* on this chart, the percentage decreases over time — descending from *Gen Y Millennials* at 35.8% to *Pre Boomers* at 11.7%. This suggests most will attend or 'try it' at some point. When they do, exceeding their expectations will fuel repeat attendance.

Helping the younger generations attend earlier in their career may be the key to elevating them to a higher attendance frequency. As previously mentioned, two-thirds (65%) of the younger generation *Gen Xers* and *Gen Y Millennials* have a high propensity to attend, and only 14% report they *"Can't get their boss' permission."* 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.

It's bridging the gap between the *desire* to attend and the *ability* to attend.

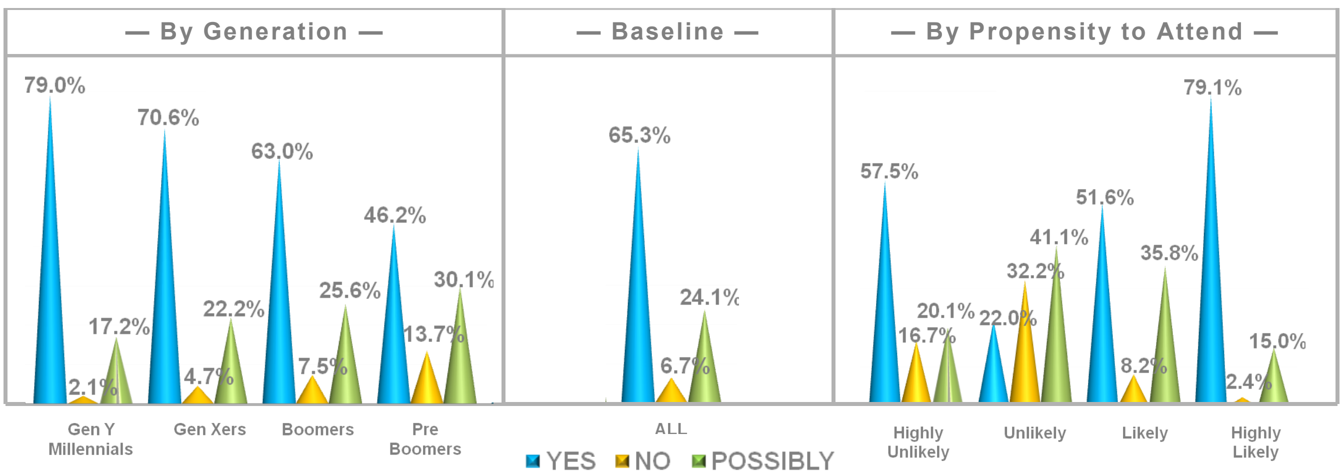
Collectively, we have to convince them and *help* them.

DECISION TO ATTEND STUDY

Nearly 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.

Respondents were asked, ***"If circumstances allowed, would you attend more often?"*** In looking at the baseline of *All* respondents, nearly two-thirds (65.3%) said *Yes*, with another one-quarter (24.1%) saying *Possibly*. Combined, this represents a remarkable nine in ten (89.4%) desiring to attend more frequently. Again, this bodes well for the future of face-to-face / F_2F.

Generationally, *Yes* responses increase with each succeeding generation, from *Pre Boomers* at 46.2% to *Gen Y Millennials* at 79.0%. This reflects roughly 50% to 80% who would like to attend more frequently, if circumstances allowed. Combining the *Possibly* responses, this grows to a remarkable 76% to 96%.

By *Propensity to Attend*, it was interesting to see over three-quarters of the *Highly Unlikelys* saying they'd like to attend more frequently (57.5% *Yes* and 20.1% *Possibly*). Surprisingly, throughout the survey, the *Highly Unlikelys* behaviors tend to more closely match those who attend more frequently. However, the *Unlikelys* are a different story. But, don't give up on them. While they were the lowest *Yes* respondents at 22.0% and the highest *Possibly* at 41.4%, when combined nearly two-thirds (63.4%) would attend more often. More research is needed, as they are definitely the 'outliers' on many questions, showing signs of desiring smaller educational and networking opportunities rather than large convention/exhibition environments. For example, they trended higher on *"Education / Networking Doesn't Meet My Needs"* (24.9% compared to 11.0% Baseline) and *"I Prefer a Smaller Convention Environment"* (26.1% compared to 6.5% Baseline). They are the decision maker, are less cost sensitive, and can be swayed by the location. For this group, changes to programming, format, or networking AND an appealing destination could possibly convince them to attend. Targeted messaging is a must for this group.

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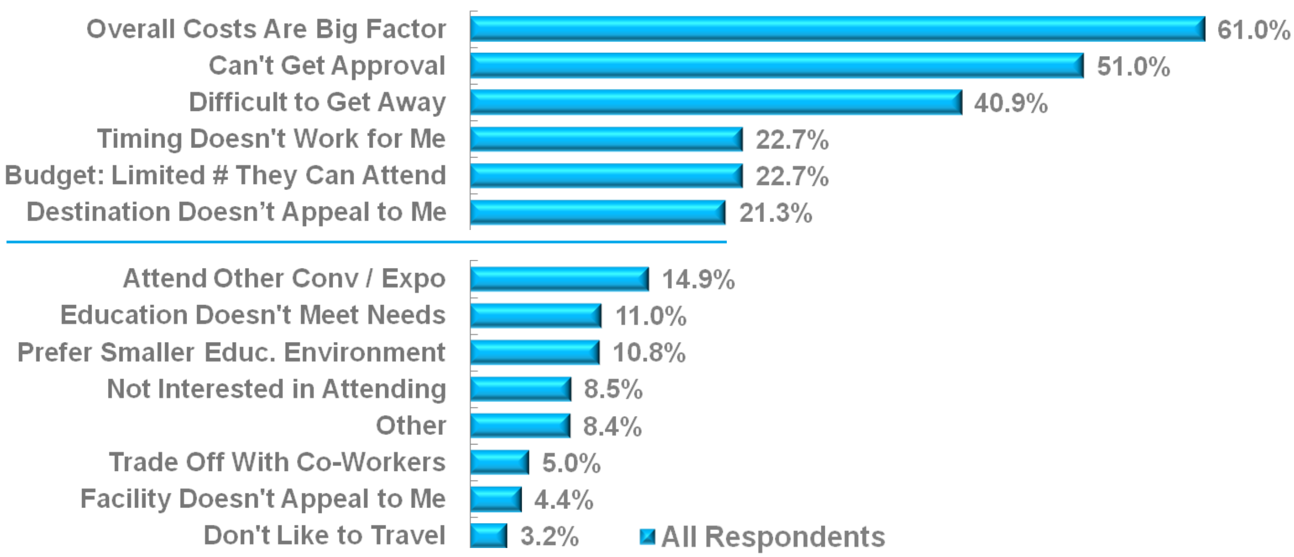
DECISION TO ATTEND STUDY

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

THE DECISION PROCESS

Barriers to Attending More Often



Barriers are Cost, Time and the Destination / City Appeal.

To determine how to move them along the continuum to a higher attendance frequency, respondents were asked to select the barriers that prevent them from attending more often. The top three barriers for *All* are: *Cost*, *Time*, and *Destination*. While there may be little that can be done in the area of *Time*, it's important to create incentives, experiences, or targeted messaging that can overcome the barriers of *Cost* and *Destination Appeal.* Surprisingly, only 8.5% said they were *'Not That Interested in Attending'.*

COST: For six in ten (61.0%) of *All* respondents, the *overall* cost 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. Additionally, budgets limit how many they can attend, with escalating percentages by generation from *Pre Boomers* at 37.5% climbing to *Gen Y Millennials* at 66.8%.

TIME: Four in ten (40.9%) of *All* respondents indicated *'It's Generally Difficult to Get Away'*, rising to 58.1% for *Gen Y Millennials*. One-quarter (22.7%) 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 21.3%. But, it's slightly higher for those who may need more convincing — the *Occasionals* 24.5%, *Frequents* 26.0% and *Pre Boomers* 30.6%. Write-in comments ran the gamut, including travel distance (driving or flying), the number of 'plane rides' to get there, and *overall* travel costs.

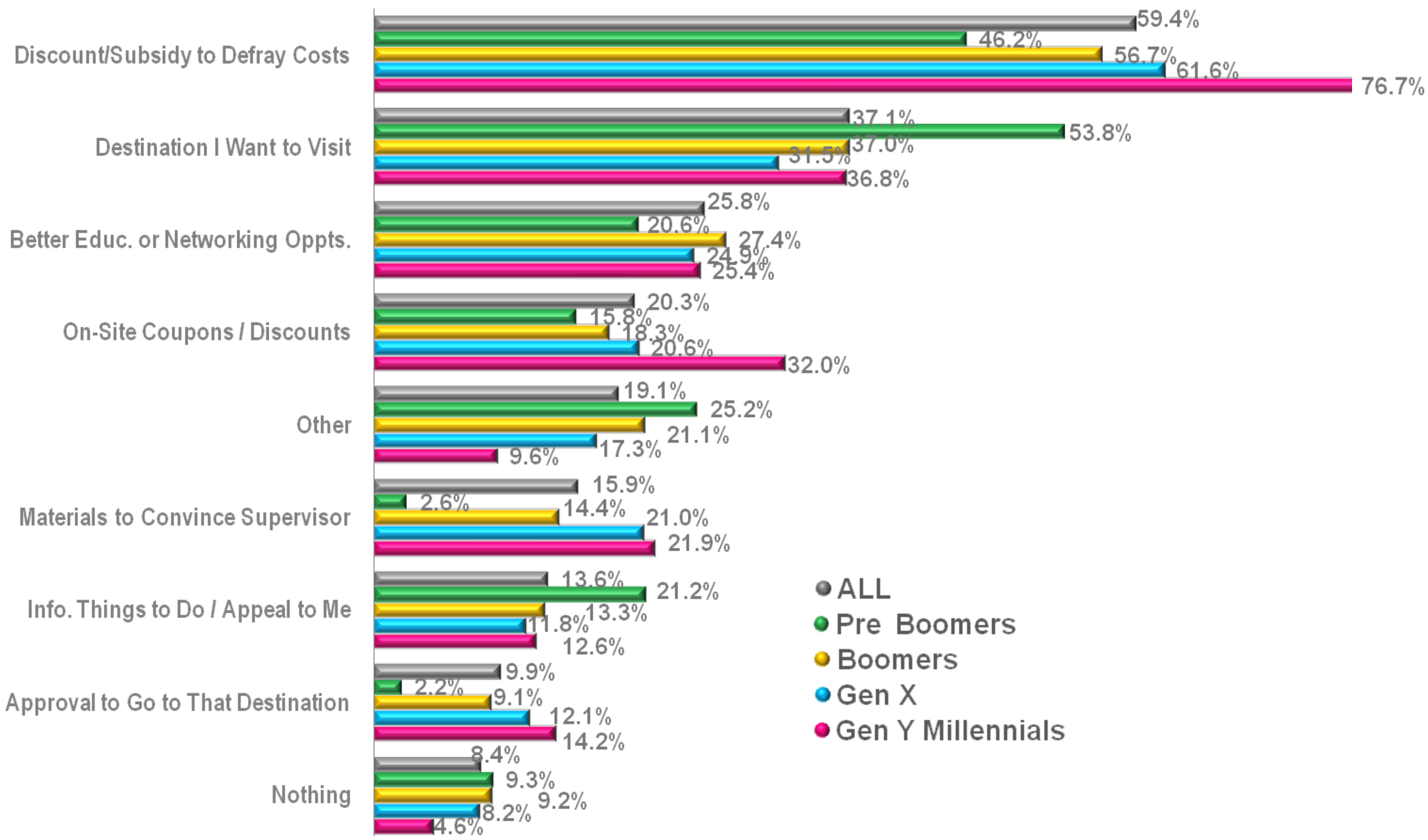
CONVENTION / EXHIBITION: Meeting professionals were curious about other potential barriers. Shown under the blue line above, these suspected barriers ranked low for all respondents. Not shown, yet important, was a question asking if a past negative experience kept them from attending. Only 8.0% said YES, and of these one-half (49.1%) said they'd try it again in 1-2 years, and one-third (34.3%) in 3-5 years.

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 (8.4%) of *All* respondents said *'Nothing'*. Cost and destination rated highest.

Focusing first on cost, six in ten (59.4%) of *All* respondents want some type of *'Discount / Subsidy to Defray Costs',* spiking to over three-quarters (76.7%) *of Gen Y Millennials,* but also important to the other generations. Roughly 20% of *All* respondents want *'On-Site Coupons / Discounts'*, rising to one-third (32.0%) for *Gen Y Millennials*. With regard to destination, '*It's a Destination / City I Want to Visit'* was a factor for over one-third (37.1%), spiking to over one-half (53.8%) of *Pre Boomers* who make their own decision. As for education and networking, *'Better Educational or Networking Opportunities'* was ranked third at one-quarter (25.8%), showing an area for further research. 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 9.9%. With regard to convincing the decision maker, 20% of both *Gen Xers* (21.0%) and *Gen Y Millennials* (21.9%) said they needed *'Materials to Help Convince My Superiors I Need to Attend'.*

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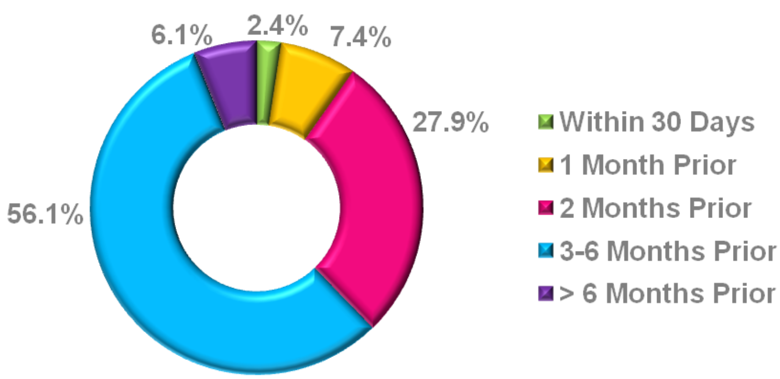
Most register 2-6 months prior, but 10% decide in one month or less — something to watch over time.

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 Projections.

Over one-half (56.1%) of *All* respondents report they normally complete the registration process 3-6 months prior, with an additional one-quarter (27.9%) deciding 2 months prior. Only 10% decide less than 2 months out, with 7.4% doing so one month prior and 2.4% within 30 days.

Not surprisingly, the more frequent attendees registered earliest, with two-thirds (62.7%) of the *Always* attendees and over one-half (58.2%) of the *Frequents* doing so. 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?"*

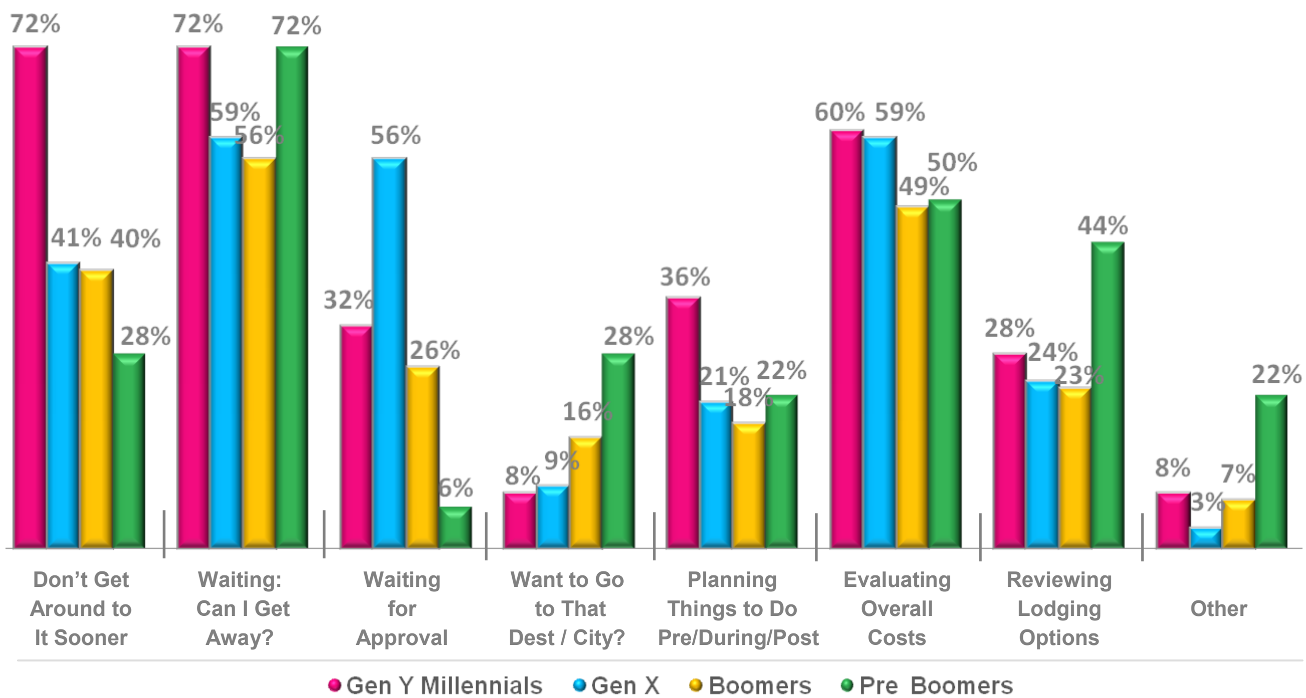
Trending this over time will help you determine if you are 'on pace' with your attendance projections — giving you a lead indicator that additional, targeted promotions may be needed.

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

DECISION TO ATTEND STUDY

THE DECISION PROCESS

Less Than 60 Days Out



Trending the Decision Timing Is Important.

Even though only 10% of respondents indicated they register less than 60 days out, it's important to know why, in order to track behavioral and generational trends. Eight, *'Select All That Apply'* factors were evaluated.

For two of the factors, all four generations clustered together. An average of six in ten (60.3%) were '*Waiting to See If I Can Get Away'*, with another one-half (52.3%) evaluating overall costs. Beyond timing and costs, there were some interesting generational variances.

Gen Y Millennials* are more prone to procrastination, spiking to 72.0% reporting they *'Don't Get Around to It Sooner'*, with slightly over one-third (36.0.%) *'Planning Things to Do Pre, During &* Post' and 32.0% *'Waiting for Approval'.

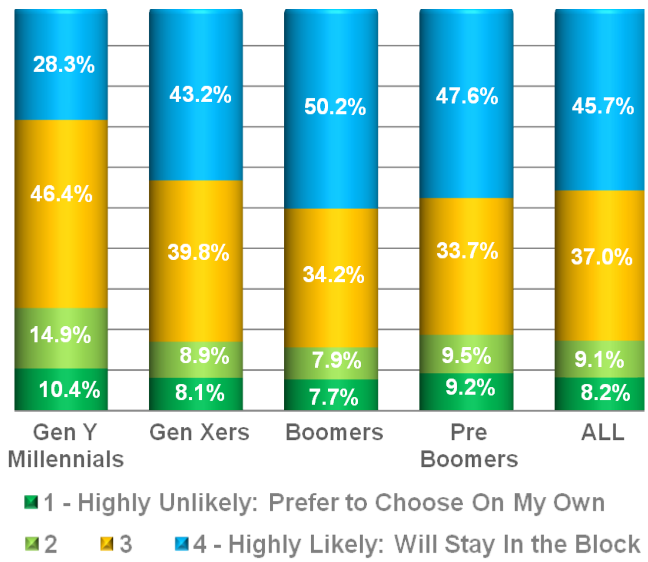
***Gen Xers* spiked to over one-half *'Waiting to Get Approval'* at 55.9%. *Pre Boomers* were the highest for reviewing lodging options at 44.4% and destination/location at 27.8%, reflecting their tendency to be influenced by the destination and costs.**

DECISION TO ATTEND STUDY

80% will stay in the official block, but Gen Y Millennials show slippage.

THE DECISION PROCESS

Staying In the Official Block



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

It's the 80 / 20 rule for *All* respondents. Roughly 80% will stay in the official hotel block and 20% won't. Trending this over time will be very important, especially given the proliferation of Internet hotel sites and entrepreneurial companies who want to capitalize on the group market.

Eight in ten (82.7%) report *'I Usually Prefer to Stay in the Official Hotel(s)',* with 45.7% *Highly Likely* and 37.0% *Likely* to do so. Of the remaining 17.3% who are unlikely to stay in the block, two-thirds (66.4%) indicate they've always stayed elsewhere, with one-third (33.7%) reporting they used to stay in the block, but no longer do so. When asked if they would change their mind, if they knew the host organization could incur penalties, one-quarter (26.3%) said they'd be more inclined to book the official hotel(s), but the remaining three-quarters (73.8%) report they would still book elsewhere.

What are the reasons? When asked to 'select all that apply, cost was the highest-rated reason for the roughly 20% that stay outside the block, with 70.7% of those showing price sensitivity by indicating *'I Think I Can Get a Better Rate on My Own, Even if I Have to Take a Cab or Public Transportation'*. Other reasons selected were: *'I'm Loyal to Hotel Brand(s)'* at 21.0%; *'I Want to be in an Area I Prefer'* at 22.2%; and *'I Prefer a Non-Hotel Environment, e.g. condo, house, B&B, etc.'* at 19.6%. Generationally, *Gen Y Millennials* had the highest variance with 28.3% being *Highly Likely* to not stay in the block vs. 45.7% of *All* respondents. In breaking down their reasons, 80.5% do so because they think they can get a better rate on their own (compared to 70.7% overall) and only 12.5% report being loyal to a hotel brand (compared to 21.0% overall). There were no significant variables by frequency of attendance, however, even 20% of the loyal *Always* attendees report they'll stay elsewhere. In today's turbulent times, these are definitely trends to watch over time.

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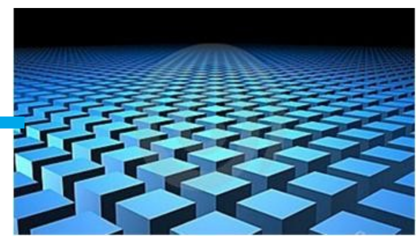
APPENDIX

Survey Segments & Methodology



Total Responses: 7,171

DECISION TO ATTEND STUDY

Segment #1: Attendance Frequency

The NEVERS
1,639 — 22.9% Have Never Attended
234 — 3.3% No Longer Attend

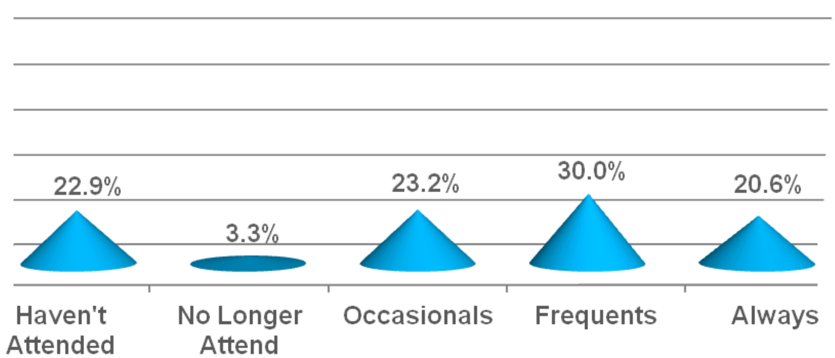
The OCCASIONALS
1,666 — 23.2% Attend Every 6-10 Years

The FREQUENTS
2,152 — 30.0% Attend Every 2-5 Years

The ALWAYS
1,480 — 20.6% Attend Every Time

When looking at attendance frequency, respondents reflected a relatively even distribution of roughly 25% for each of the four segments — *Nevers, Occasionals, Frequents, Always.*

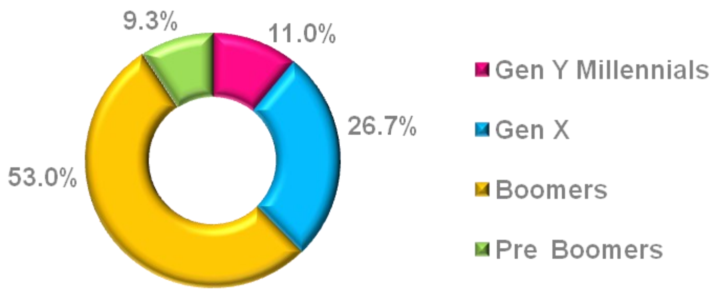
The mutual objective of meeting professionals and destinations is to implement strategies to move them along this continuum — to a higher frequency of attendance.



Total Responses: 7,171

DECISION TO ATTEND STUDY

Segment #2: Generation



Eight out of ten (79.7%) survey respondents are from two generations that comprise most of today's full-time workforce — *Gen Xers* (26.7%) and *Boomers* (53.0%) — a prime target for marketing and promotion. Special insight was also gained from *Pre Boomers* and *Gen Y Millennials* — combining to 20.3%.

GEN Y / MILLENNIALS
Born 1980-2000
791 — 11.0%

GEN Xers
Born 1965-1979
1,916 — 26.7%

BOOMERS
Born 1946-1964
3,800 — 53.0%

PRE BOOMERS
Born 1900-1945
664 — 9.3%

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Total Responses: 7,171

DECISION TO ATTEND STUDY

Segment #3: Propensity / Likelihood to Attend

A remarkable 91.7% 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. Overall, the *Propensity to Attend* is high, which is good news for the future of face-to-face / F_2F.

The UNLIKELYS

227 — 3.2% Highly Unlikely

I prefer not to attend conventions / exhibitions

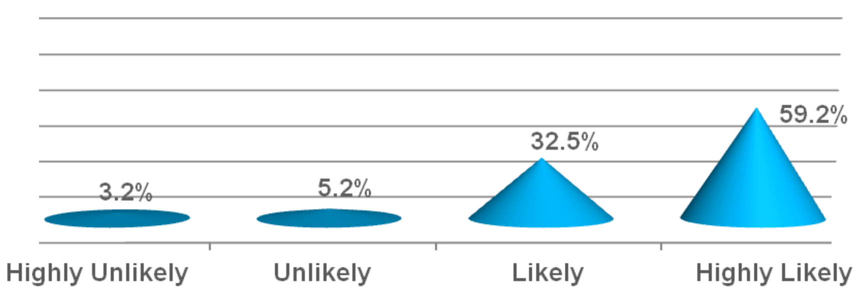
371 — 5.2% Unlikely

The LIKELYS

2,328 — 32.5% Likely

4,245 — 59.2% Highly Likely

I like to attend conventions / exhibitions



Total Responses: 7,171

DECISION TO ATTEND STUDY

Methodology

Phase One Survey Methodology

OBJECTIVE: Gain insight from meeting professionals, exhibition managers, and destination marketing organizations (DMOs) to shape the research survey.

***PCMA CEO Summit,* Boston, January 2014**
Small group discussions and report-out with over 40 CEOs of DMOs in the U.S. and internationally, focusing on the who, when, why, and how of the decision to attend.

***Meeting Professional Focus Groups,* Washington, DC, February 2014**
Three 90-minute focus groups with 14 meeting professionals yielded additional areas for exploration.

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 ten organizations, representing a wide range of industries and professions, volunteered to send an e-mail inviting participation in an online survey. Each organization targeted their normal list of prospective attendees, e.g. past attendees, non-attendees, members, executives and business owners.

American Bankers Association ● American College of Obstetricians & Gynecologists ● American Society of Civil Engineers ● Association of Equipment Manufacturers ● International Association of Administrative Professionals ● International Association of Fire Chiefs ● National Association of Broadcasters ● National Automobile Dealers Association ● TESOL International Association ● Unitarian Universalist Association

- **Analysis was based upon numerous factors, focusing on three core segments: *Attendance Frequency, Generation*, and *Propensity to Attend***
- **The survey invitation was distributed to a total of 214,484 individuals**
- **Received 7,171 responses for a rate of 3.3%, with Margin of Error at +-1.16%**
- **An incentive of opt-in entry into a random drawing for one of two $500 cash prizes was offered**
- **The survey was open between September 17-31, 2014**

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