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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Acknowledgements

Organizations Surveyed — 8,992 Responses!

Special thanks to the following organizations who disseminated the Decision to Attend 2 survey.

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

To download the Full Report, go to your professional organization website or to: TheExperienceInstitute.org

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.

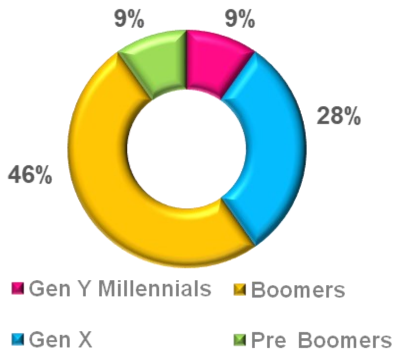
DECISION TO ATTEND STUDY

Survey Segments

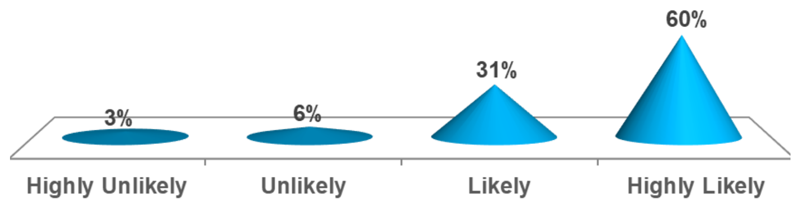
DECISION TO ATTEND STUDY

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).*

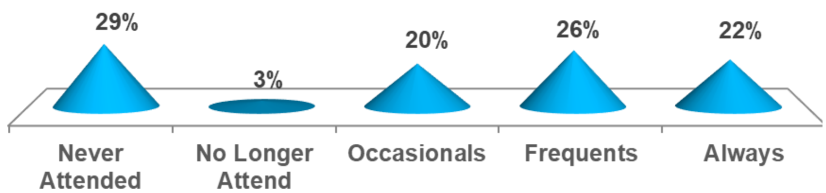
— By Generation —



— 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

The Destination Remains the #2 Driver

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

71% 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.

To download the Decision to Attend 2 *Full Report, Best Practices Checklist,* or the *Behavioral Profile Template*, go to your professional organization website or to: TheEXPERIENCEInstitute.org

BEHAVIORAL PROFILE TEMPLATE

DECISION TO ATTEND STUDY

Thank You for Fueling the Vision.

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