Executive Summary

Second Survey
Decision to Attend 2: 2017

Total Responses: 8,992
Introduction

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

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

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

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

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

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

We encourage your participation in this important vision!

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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

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!

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

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.
EXECUTIVE SUMMARY

Foreword

As An Industry, We’re Often Guilty

We Need to Surgically Target Market Today’s Discerning Attendees

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

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

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

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

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

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

Every recipient of a meeting promotion asks:

Do I need to go?
Do I WANT to go?

Getting them to YES is critical.
EXECUTIVE SUMMARY

Survey Segments

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

— By Generation —

— By Propensity to Attend —

— By Attendance Frequency —

Moving Them Along
the Frequency Continuum

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

Nevers ➔ Occasionals ➔ Frequents ➔ Always

(Every 6-10 Years) (Every 2-5 Years)
EXECUTIVE SUMMARY

Key Findings

ARE THEY ADULT LEARNERS?

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:

<table>
<thead>
<tr>
<th>Driver</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>92%</td>
</tr>
<tr>
<td>Destination</td>
<td>78%</td>
</tr>
<tr>
<td>Networking</td>
<td>76%</td>
</tr>
</tbody>
</table>

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.
EXECUTIVE SUMMARY

#1 Driver: Education

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

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.

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

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

#2 Driver: Destination

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% Frequent and 10% Always attendees. Don’t give up on the Occasionals, they can be convinced.

#3 Driver: Networking

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

WHO DECIDES?

For Many, Someone Higher Up Decides

Who Makes the Decision

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

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

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

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

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.
EXECUTIVE SUMMARY

WHAT’S THE TIMING?

Most Will Decide 2-6 Months Out

Most Register 2-6 Months Prior

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

Under 10% Less than 2 Months

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

WILL THEY STAY IN THE BLOCK?

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

Most Stay in the Official Block

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

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

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

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.
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WILL THEY RETURN / RECOMMEND?

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

- **85% are Likely to Repeat Attendance** at the same event and 77% a different event, if the destination experience is positive.
- **79% are Likely to Return for Leisure** if the destination experience is positive, even higher for 84% of Gen Y Millennials and 83% of Gen Xers. They attend on someone else’s dime and return on their own dime, which is significant.

Recommend Intentions

- **89% are Likely to Recommend the Conv/Expo**, if the event met or exceeded their expectations, rising from 85% in 2014.
- **88% are Likely to Recommend the Destination**, if the destination met or exceeded their expectations, climbing from 83% in 2014.

ARE ATTENDEES OF VALUE?

Attendee$ are Valuable to the Destination

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

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

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

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

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

The sale is made when the convention leaves.

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EXECUTIVE SUMMARY

DOES THE DESTINATION EXPERIENCE MATTER?

Attendees Have High Expectations

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

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

It Matters That the City is Working on the Experience

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

Attendees Will Tell Others About Their Experience

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

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

Giving Feedback

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

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

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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
Thank You for Fueling the Vision.

DETERMINE BEHAVIORS • MAXIMIZE ATTENDANCE