

Freeman End-of-Year Trends Recap

Highlights of our research in 2025 and a look ahead to 2026

EXECUTIVE SUMMARY

Great Expectations



In 2025, organizers spent much of the year planning around familiar habits and holding their footing amid major uncertainty.

- Organizers emphasized early registration benefits, while attendee registration patterns shifted later.
- Attention was dedicated to finding the right celebrity speaker and planning the perfect after-hours events, but attendee behavior indicated that the real value lies in core objective-driven experiences.
- Old patterns were expected to settle back in, but attendee behavior indicated that these familiar and predictable elements were no longer enough.

So, while the industry remained steady, settling for the comfortable and familiar stopped it from gaining meaningful ground. That's because **surviving is not the same as changing, growing, and leading the way!**

While overall attendance stayed level, retention didn't. Too many events focused on acquisition but neglected to track why new attendees didn't come back after one visit. So, if uncertainty was the theme of 2025, then **retention must be the focus for 2026.**

This report summarizes a challenging year for many and points toward a year shaped by more purposeful planning. The industry made it through the turbulence of 2025; now we need to lean on our learned resilience and stay up to date with industry headwinds and focus in on attendee objectives.

2026 is about moving forward with clarity and designing experiences that meet the expectations attendees bring with them. That is how retention rises, and how our events can grow.

What 2025 Made Clear

Attendees came into 2025 setting clear goals, wanting more personalized experiences, increased opportunities for active participation, and purposeful networking. Planners had different focuses, most notably (and understandably) how to keep up attendance levels and potentially increase them.

Face-to-face remains the most [trusted marketing channel](#), despite headwinds, sources across the industry reported that in-person event participation was remarkably consistent in 2025. And that consistency matters, even though the growth has slowed from the highs of 2023 and 2024.

But despite that consistency, the bar for what makes an event worth revisiting has risen higher. So, the story of 2025 identifies the major perception gap between how events are planned by organizers and the expectations of them held by attendees.

»»» What It Means For 2026

Instead of over indexing on concerns outside of our control, listen to what attendees are prioritizing—and what they're less worried about! Attendees and exhibitors are as **much as 20% more positive about event headwinds.**



51%

of attendees plan
on going to 2-3 events
in the next 12 months

Right Idea. Wrong Focus.

Organizers worried about visa restrictions may be focusing on the wrong problem. Yes, international attendance at US events faces numerous challenges, but data shows travel constraints and visa approval challenges aren't the primary culprits. Instead, three other factors are doing the heavy lifting:

1

Broader perceptions about traveling to the US are playing a larger role than logistics. The "should I even go?" question is being asked and answered before attendees even start visa paperwork.

2

Government shutdown timing was a major contributing factor. That, along with the suspension of the Department of Commerce's Trade Event Partnership Program (TEPP), which helped recruit international buyer delegations to numerous US trade shows in 2024.

3

Companies are hesitating even where travel is possible.

October 2025 polling from the Global Business Travel Association shows businesses remain cautious about increasing business travel volume, while the overall outlook stays optimistic.

»» What It Means For 2026

International attendance challenges run deeper than border logistics. Organizers should understand the real barriers in order to make changes where they actually matter.



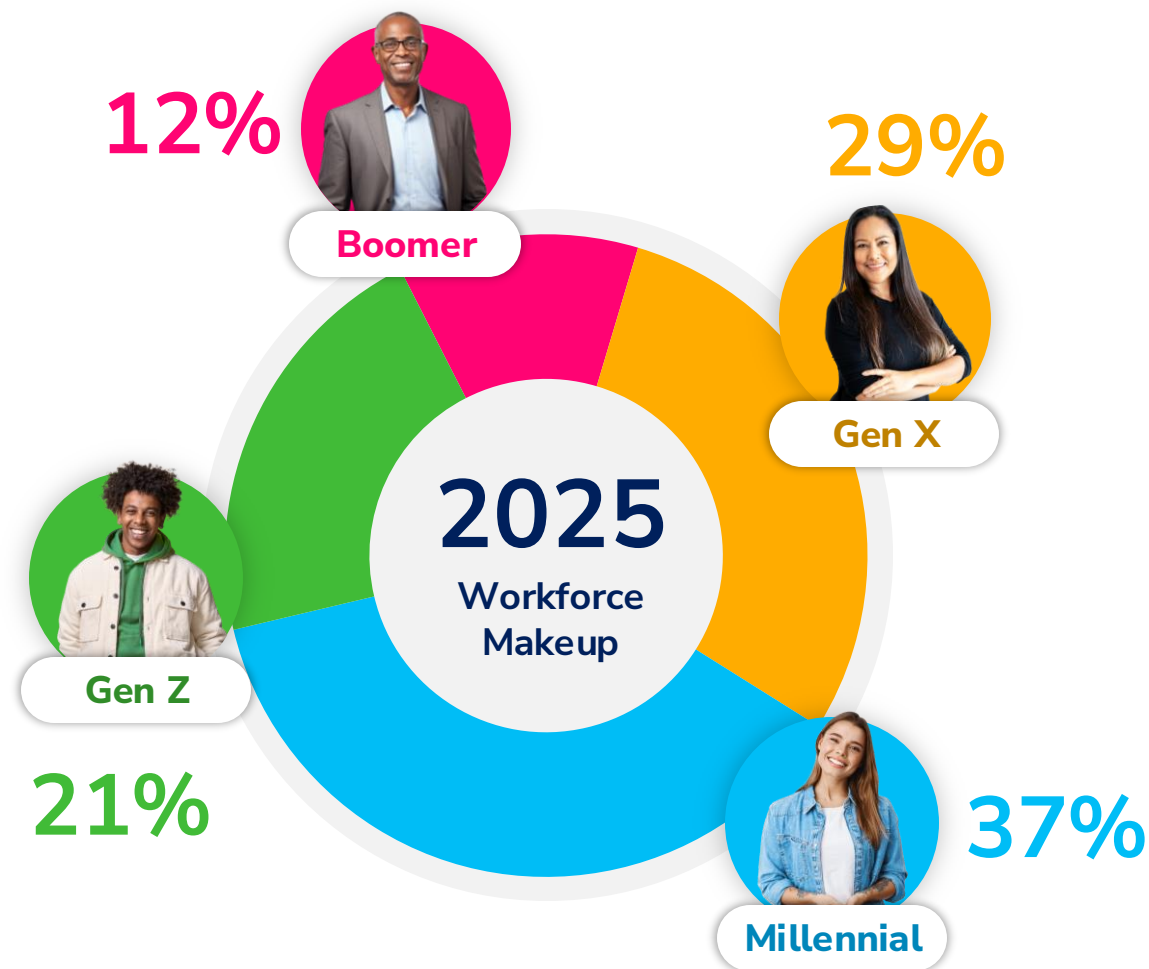
The Generational Shift

In previous reports we explored the rise of the Next Generation Event Goer, but they're no longer 'coming soon'. The Now Generation (NowGen) is here and they're already reshaping in-person events and commercial expectations. Digitally native, socially conscious, and driven by authentic connection, they bring new values to every interaction.

What's fascinating about this generational shift is that Millennials (soon to be 40% of the workforce, and an enormous portion of event attendance) skew more white collar than previous generations.

And since the B2B events industry is heavily focused on white collar workers, it stands to reason that that 40% will loom even larger on the expo floor.

The workplace reflects just how rapidly the generational power is shifting to Millennials and Gen Z. Any events that don't shift accordingly risk retiring with our Boomer attendees.



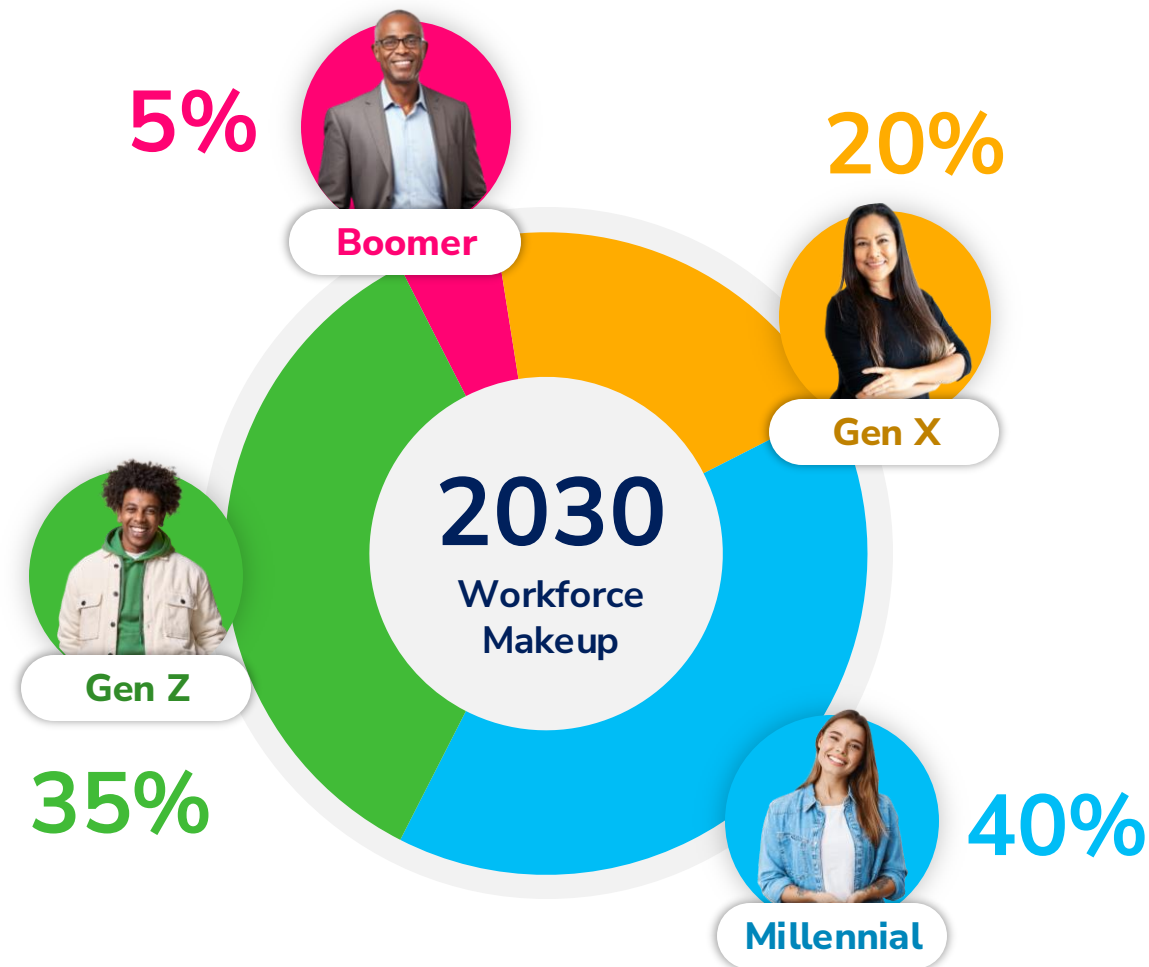
Meeting the NowGen's Expectations

We can stick the landing on this generational shift because NowGen attendees are explicit in what they're looking for from events.

They expect **authenticity, relevance, transparency, and experiences that align with their priorities**. Right now, they're attending events that are primarily designed with Boomers in mind—but it won't stay that way, whether they choose to attend other events or we respond to the data and change how we design the experience.

Retention of Millennial and Gen Z attendees is critical to offset the impact of Boomers and even Gen X retirement over the next few years.

Fortunately, the incoming generation is clear about the fundamental things they're looking for at an event. Focusing on those core objectives—learning, networking, commerce—will make or break the future of our industry.



The Organizer's Challenge

The expectations gap shaped decisions in 2025 in major ways.

Organizers planned for friction differently than attendees felt it. Their responses were often conservative: safer layouts, cautious programming, and protective commercial strategies. These choices may have shielded individual events from risk but also kept them from building real momentum with attendees.

Their investment dollars targeted early registration numbers, treating them as a reliable predictor of success. Programming followed suit, with energy directed toward celebrity talent and after-hours experiences designed to generate buzz.

Meanwhile, attendee behavior showed that progress toward their objectives during the event, not the spectacle around them, is what drove their satisfaction and return intent.

These trends reflect what many of you have experienced across all industries (particularly government and healthcare). We see those challenges and are here to work through them with you. Read this report with that context in mind.



2025 Insights



Registration Ran Late ... But it Still Ran

Organizers watched registrations arrive closer to event dates, tracking behind previous years. But late registration is now stable behavior, not an anomaly. And "late" doesn't necessarily mean last-minute, as on-site registrations are dropping significantly.

The gap reveals itself in how early registration is structured today. Current incentives primarily benefit organizers and exhibitors—early-bird pricing for cash flow, confirmed numbers for sponsor pitches. Attendees see through this.

Being concerned is understandable because, for organizers, late registration complicates forecasting, programming, and exhibitor communication. But **attendees aren't concerned with registration timing**. What locks in attendee registrations are benefits tied to their business goals, not the operational convenience of planners. To solve the late registration problem, we need to come together as an industry and look at what benefits the attendee—we are seeing success in focusing on areas like personalization, scarcity, nostalgia, VIP access—because those are the things that will lock in registrations and drive retention.

Late, but not last-minute registration is key here—on-site registration is dropping, and organizers shouldn't rely on day-of registration bumps. Instead, they may expect more late cancellations: last minute hotel and airfare cancellations are no longer tied to steep penalties like in years past, allowing attendees to skip an event at the last minute. In 2026, we should anticipate this and plan accordingly, instead of fighting a last-minute battle.

50%

events were
behind their regular
registration pace



Objectives Drive Retention

When people come to an event, they come with goals. Across all three Freeman trends studies this year, the pattern was clear: when attendees achieved what they came to do, they felt good about the event and were likely to return. Hands-on engagement plays a central role in meeting those objectives: **more than 90%** said that hands-on experiences made it easier to champion an event.

And where attendance dropped off, even because of budget, attendee objectives going unmet often steers decision-making: as budgets are being cut and spending is scrutinized, attendees must think more about value-for-cost and perhaps the most important value, their time.

»»» What It Means For 2026

Event design should revolve around attendee objectives, not organizer convenience. The moments that help attendees make progress are the moments that earn loyalty.



To learn more about objectives, look at the last slide for links to our Unpacking Excellence series

Attendees Want Guidance

Attendees want more than just a map of the main hall: they want help planning out their time on your turf. They traditionally look for direction on which exhibitors to visit, what parts of the expo to prioritize, and which sessions or conversations will matter most. In fact, navigation and vendor discovery is their biggest frustration when it comes to evaluating events.

At the same time, they want serendipity in the event experience—and that’s an expectation you can plan for!

Their choices made it clear that events perform best when they help attendees navigate toward what matters to them and experience moments that delight them, with fewer guesses required along the way.

Personalizing their experience doesn’t have to start from scratch. **More attendees are willing to share more information than ever before if it means making their event experience worth their while.**

»»» What It Means For 2026

Expo floors organized around communities of exhibitors will outperform traditional layouts. That might not be easy, but it may be one of the most rewarding investments you can make—guided pathways, curated recommendations, and clear navigation take serious strategic coordination, but all can and will define event performance.

54%

of attendees are willing to share their on-the-job challenges if it helps point them toward better networking

Most useful pre-event offerings for attendee evaluation / discovery



Map that allows me to plan a path for what vendors I will visit

61%



Online listing of exhibitor products and services

57%



Understanding how vendors on the expo floor are segmented

24%



Email / communication from exhibiting companies regarding **new products / solutions**

21%



Tool that allows for setting up meetings with vendors in **advance**

20%



Hands-on Engagement Really Matters

Immersive moments are meant to be intentional, not decorative. Participatory interaction helps attendees evaluate products, learn from peers, and move forward with confidence. And when attendees network, they expect that experience to help them learn something new, improve their idea sharing, and help them identify chances to collaborate.

Attendees tell us that hands-on experiences enhance purchase decision certainty and helps them achieve their objectives at an event.

>>> What It Means For 2026

Build meaningful participation into product evaluation, learning environments, and networking formats. More hands-on experiences can create more peak moments. To learn more, look at the "X Factor" report we launched in 2025.



of attendees state that hands-on opportunities or demonstrations are most useful for product/solution evaluation and decision-making.



Bring on the SMEs!

Attendees aren't just looking for information. They want to talk to someone who really knows their stuff.

When attendees interact with SMEs (subject matter experts), the whole experience feels different. Attendees get real answers now, not in an appointment following the event. They can ask specific questions, pressure-test claims, and walk away with the kind of clarity a brochure or QR code can't deliver. Expertise builds confidence, and confidence drives decisions. If exhibitors want to draw more decision-makers, they need SMEs to make that happen.

»»» What It Means For 2026

Make expertise easy to find! Put SMEs where the real conversations happen—in hands-on moments at booths (instead of being there just to sell or scan badges), in on-the-floor sponsored talks, or wherever your attendees are trying to figure out what's right for them. When people can talk to someone who knows their stuff, they stay longer and learn more.



84%

said connecting with
subject matter experts is
extremely or very important
at the most valuable event
they attended

2026 Implications



There's high value to be found in interactions that are designed specifically for face-to-face events. In other words, **if you can do it on Zoom, don't do it in the room!**



Plan For Intentional Participation

Across all three Freeman trends studies this year, one theme kept showing up: **attendees participate with intention.**

Their goals might vary based on challenges or responsibilities, but their behavior is steady. They go where value is clear, they skip what feels unfocused, and when the experience matches the reason they came, they engage and stay that way.

Plan events with this level of intention—not just their post-event survey responses—in mind, because it's the filter attendees arrive with. They judge the entire experience through the lens of “Did this help me?” When the answer is yes (hopefully a resounding one!) participation and retention build naturally. When the answer is unclear, attendees drift—and many don't return next time.

Architecting Serendipity

There's a formula for meaningful networking

Most event planners get close with provisions, people, and place, but they overlook the most critical variable: purpose. And that's where opportunities for connection fall flat. Organizers spend a lot of time and energy filling a stylish venue with great food, drinks, and people who want to connect. Then they cross their fingers and hope that connection just ... happens. But without a purpose it rarely does. **Purpose doesn't just add to the networking equation—it multiplies it.** Purpose is the catalyst that transforms a passive crowd into an active community. Purpose gives people a reason to reach across the room, not just sip and circle.

And that's exactly what event participants are asking for.



The Organizer's Opportunity

Planners don't need more activity; they need better alignment. **2026 is the moment to design around what new generations of attendees are actually trying to accomplish**, not what used to work before the industry shifted.

That starts with understanding attendee goals earlier—before registration, before programming, before the floor plan is locked, and way before you read the post-event survey responses. While you may be trying to cut down the length of your registration questions, this year prioritize asking attendees what their core objective is upfront.

It also means finding ways to understand non-attendees, those who aren't already 'bought in' to your event or lapsed attendees who no longer prioritize it.

Attendees have made it clear what they want, and organizers who listen sooner—and communicate better based on what they've heard—will be ahead of the game.

Better alignment isn't about being trendy. It's about helping people feel successful at your event.



The Cost of Keeping It Status Quo

Ignoring these shifts doesn't create immediate failure, but it will relentlessly eat away at an event's success.

When expectations and experience don't line up, the cost shows up in retention. First-time attendees don't always complain. They don't fill out a form explaining why they're not coming back. **They simply disappear from the next year's list.**

Plainly put, budget pressure will continue to shape attendance, but it isn't the only factor. A significant share of attendees step back when events don't help them discover something useful, learn something relevant, or connect in ways that matter. When that happens, registration can be on track, and an event can still fail to make its numbers in a meaningful way. **Retention is where the industry regains ground, and there are pathways to it if we pay attention: learning, networking, and commerce.**

In other words, retention is where events win or stall.

Acquisition can hold steady, but growth will stay flat or even decline if attendees don't return and retention doesn't offset tectonic shifts hitting the workforce.



20%

of attendees don't believe their objectives (like networking and learning) are being met at events

Retirement is Outpacing Retention

Two parallel forces are reshaping event audiences, and we cannot ignore either one. Attendee retirement is currently outpacing attendee retention (industry average of only 30-35% YOY), and this balance must shift. Retention needs to outpace retirement to keep events stable during generational workforce transition.

The math is straightforward: Gen X and Boomer attendees are cycling out of the workforce faster than Gen Z and Millennials are cycling in. Events designed for the outgoing generation won't attract or retain the incoming one. Your core audience is retiring without a new group to replace them.

Approaching this not as a problem to solve but an opportunity to grow will help you redesign events for the 75% of the workforce that will be Millennial and Gen Z by 2030.

This challenge is real, and our industry can use this transition to build momentum. If you want your events to succeed, this isn't optional. It's the clear path forward.





What We Can Do To Get Ahead

These aren't dramatic overhauls of events as we know them—just targeted adjustments rooted in closing the expectation gap, starting with a stronger commitment to retention.

The research points to a clear set of moves for planners who want to win 2026:



Show people what they'll take home

Make the value obvious before and during the event, not after, and make sure that the takeaways are clearly connected to their objectives.



Focus on active participation

Hands-on moments, peer learning, and real interaction help attendees feel progress, not just presence.



Count retention in your KPIs

Shift your marketing investment and planning toward retention, instead of just recruitment. Ongoing, always-on engagement is now a core driver of loyalty and long-term growth.



Curate and design for facilitated networking

Audit your existing format to understand if it's actually successful and why, then build around shared challenges, roles, and purpose.



Expect later registration

Attendees aren't concerned with registration timing. What locks in attendee registrations are benefits tied to their business goals, not the operational convenience of planners.



Organize the floor for ease

Group exhibitors by communities or problem spaces so attendees can find relevance faster and exhibitors can have better conversations.

Unpacking XLNC

Speaking of meeting objectives: we're almost done with a full year of trend reports, and the best place to go for guidance on winning retention in the year ahead is the XLNC framework.

Learning is a top objective at many events across all of our attendees. And whether we want to believe it or not, many organizers' education programs are competing with free or employer-sponsored online resources—so knowing how to better deliver effective learning experiences is critical for your event to meet objectives.

That's why the final report is Learning, coming your way in 2026. In the meanwhile, as we think about how to meet our attendees' objectives and exceed their expectations, keep the Experience, Networking, and Commerce reports handy. The data tells us where our audiences are and want to be and meeting them on their terms is what drives retention time and again.

See the full picture—
download the reports you may have missed



EXPERIENCE

Have fun, feel emotionally fulfilled, enjoy the environment



LEARNING (COMING 2026)

Be inspired, learn something new, receive training



NETWORKING

Make connections, socialize with new and existing contacts



COMMERCE

Evaluate vendor offerings, build awareness, discover new products/services



Connect with Freeman

Represent your events in the 2026 Learning report

For details on how your organization can participate, reach out to:

Ken Holsinger

ken.holsinger@freeman.com

Performance Benchmarking and Analysis

Evaluate your event across key performance indicators and compare against industry benchmarks to uncover misalignments, helping close the gap between offerings and expectations.

On-site Event Assessment

Evaluate your attendees' unique motivators and uncover where your event meets (or misses) the mark using our proprietary XLNC assessment tools.

Community Needs Discovery

Uncover unmet networking needs among past and current attendees and exhibitors through targeted surveys, helping you design event experiences that align more closely with what your community is looking for.

Maximize Value Drivers

Pinpoint what matters most to existing and prospective attendees and exhibitors. Use data to challenge assumptions and align your event more closely with everyone's goals.

Sponsorship Analysis and Strategy

Help sponsors define event objectives, uncover new activations, and create sponsorship opportunities that can optimize engagement between sponsors and attendees.

Insight-to-Action Strategy Session

Facilitate a focused discussion with your team to translate attendee insights into actionable design strategies, uncovering high-impact opportunities to bring more purpose and alignment to your event experience.