

What's Keeping People From Attending Your Event?

Identifying what non-attendees seek from professional events

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Report Overview

Total Community Needs Survey participation: 20,000 responses

Total number of **recent attendee** respondents: 6,000
Margin of error: +/- <2.5%

Total number of **non-attendee** respondents: 6,800
Margin of error: +/- <2.5%

Setting the Stage

Freeman Strategy & Insights conducted our **Community Needs Survey** for participating organizations in 2024 & 2025. The Community Needs Survey **evaluates audience priorities, motivations for attending events, and in-person event expectations** – see slide 21 for more details on the survey and how your organization can participate.

The data in this report represents **professional conferences (72% of responses) and trade shows (28%)** across a variety of event sizes and industries. See the appendix for a breakdown of event type and respondent characteristics represented in this report.

Participating organizations provided contact lists for surveying recent event attendees, previous attendees, and individuals who have never attended their event, but may have attended other industry events. This report highlights **differences between recent event attendees and those who have never attended** the participating organization's event – identifying what would attract non-attendees to their events.

Recent Attendees

Colors used when comparing recent attendee (attended in either 2024 or 2025) and non-attendee data side by side.

Non-Attendees



Indicator for significant differences for non-attendees relative to recent attendees.

The Innovators

Freeman's Fall 2024 trends report revealed a subset of organizers that are seeing (or making) changes from one event to the next – the Innovators.

These organizers focus on a few different areas that set them apart from others. One of which is closer attention to **non-attendee** feedback.

This report takes a close look at what appeals to individuals who have not attended an organizer's event, revealing how events can attract the elusive non-attendees.

Influenced by market trends most

In tune with attendee and exhibitor objectives

Balances rising costs with the need to evolve the attendee experience

Influenced by **non-attendee** and potential exhibitor feedback

Likely to diversify educational formats

EXECUTIVE SUMMARY

Attracting Your Non-attendee Audience



Freeman Trends Reports show that people judge an event's value by if it helped them achieve their goals. Non-attendees think the same way. Only they choose NOT to attend an event because they don't see how it will help them.

Most non-attendees point to “value for the cost” as the main reason to skip an event. They simply don't expect it to move their goals forward more than other options. Figuring out what will convince them otherwise is key to growing attendance.

Interestingly, both non-attendees and recent attendees agree on some reasons why an event is valuable. But in this report, we show there are several value drivers that matter more to the non-attendee audience.

For example, Gen Z and Millennials – a sizable share of non-attendees – often prioritize different things in a live event than other generations. Freeman's data shows details like the event location and the after-hours party matter less to this group. Organizers have traditionally put significant resources to push those, but now those resources could be shifted to bolster other areas.

The bottom line is that to reach non-attendees, organizers need to take different approaches to how they market and position their event, and to do that they need to first better understand the non-attendee audience.

This report breaks down what stands out most to non-attendees so you can begin to win them over.

What Prevents Event Attendance



Consumers evaluate the price for any product or service relative to the value that offering provides – a similar principle applies for event attendees

Deloitte research found that consumers are more likely to buy from brands that provide more value for the price. Organizers should be mindful that prospective event attendees likely have their “consumer hat” on when determining whether to attend a professional event. Individuals who do not attend, despite an event being relevant for their role or industry, may not see enough value relative to the cost for attending – factoring in registration cost, travel/hotel expenses, potential to attend other events, and the opportunity cost of their time.

4 in 10 Americans are **value seekers** – consumers who demonstrate three or more cost-conscious, deal-driven, or convenience-sacrificing behaviors.

Value seekers **span ages as well as income groups.**

Price perceptions account for 60% to 90% of consumers’ perceptions of value.

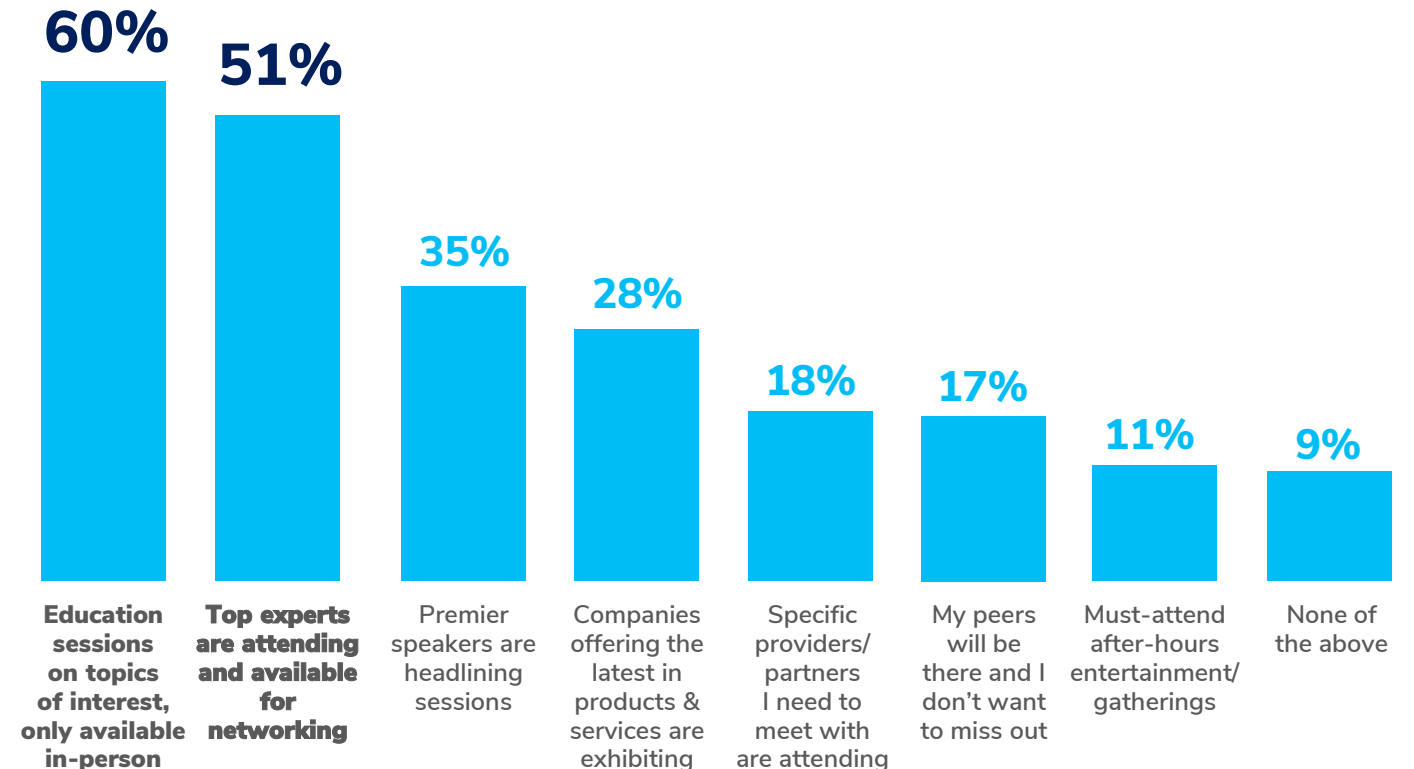
QUESTION

Which of the below factors would make <EVENT> valuable enough for you to attend despite the cost factor(s) you noted in the previous question? Select all that apply

Education sessions on key topics + Networking with SMEs = Overcoming value-for-cost blockers

Most non-attendees believe that if an event offered a clear value proposition, typically aligned with learning, that it would make attending a professional event appealing enough to get past travel and registration cost implications.

Factors that Could Overcome Cost-related Reasons for Not Attending



Non-attende Professional & Event Priorities

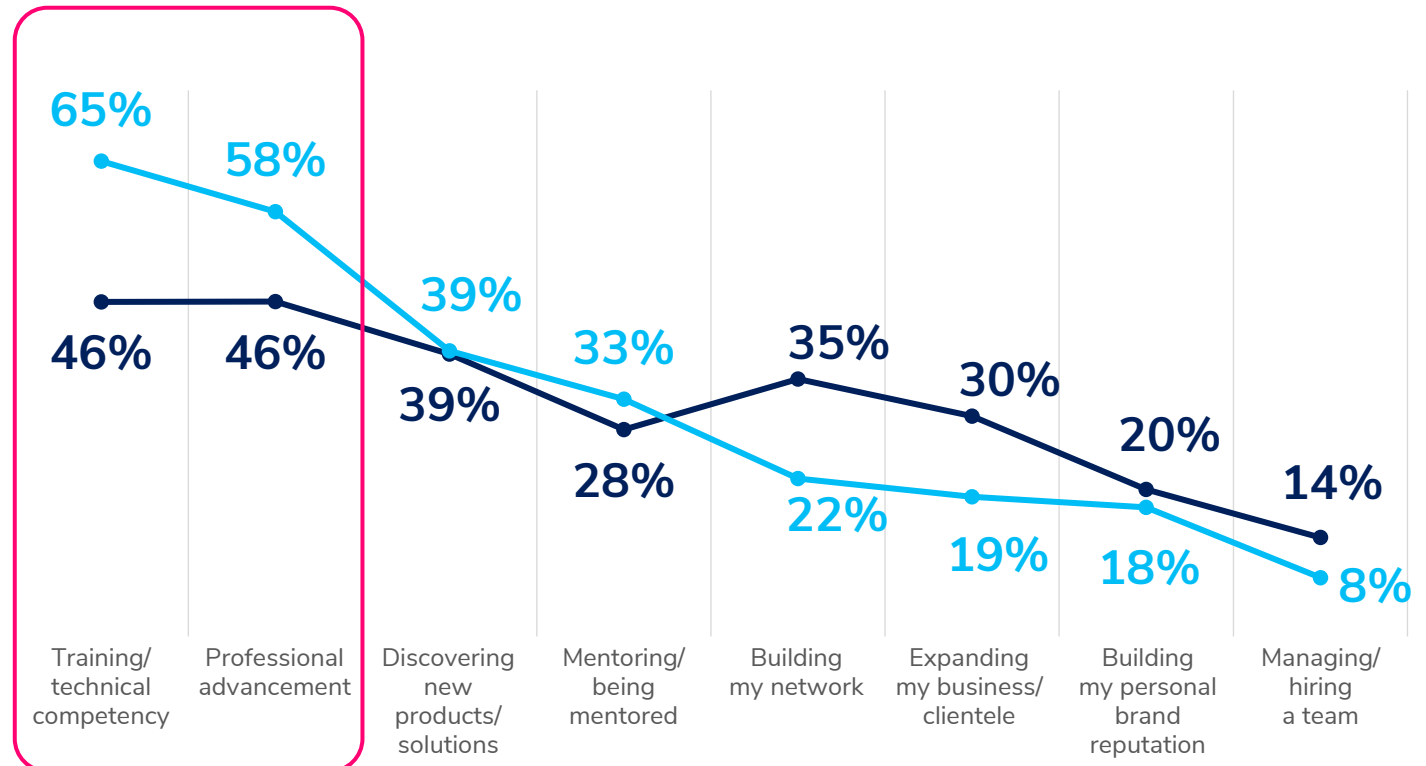


QUESTION

What are the top priorities in your work/career?
Select up to 3 options.

Important Reasons for Non-attendees to Consider Your Event

■ Recent attendees ■ Non-attendees



A focus on training & professional advancement among non-attendees should contribute to how organizers market to this audience

In contrast, recent attendees to events consider network building and expanding their business to be more of a priority – aspects that organizers should highlight as a reason to return to the event.

Those who never attended are more likely to represent the Gen Z and Millennial audience (47%) vs recent attendees (39%), accounting for some of the non-attendee respondent focus on career development aspects.

QUESTION

When it comes to in-person events, rate the importance of the following elements to your on-site experience.

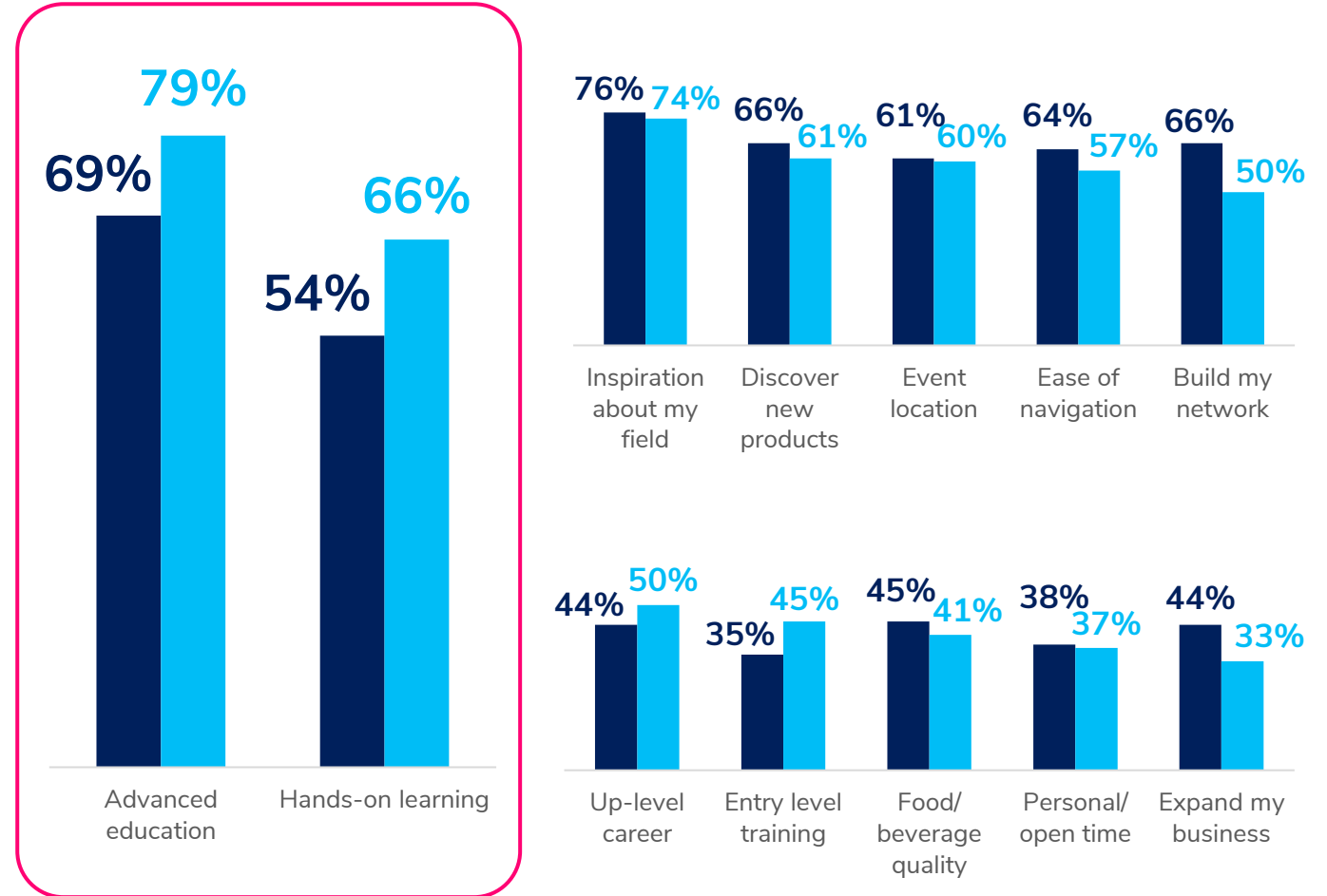
Attracting non-attendees requires more attention to advanced education & hands-on, participatory learning elements

Recent attendees are likely to be more responsive to networking building elements – reminders about the importance of the contacts made at the event previously – and enhancements to event navigation. Recent attendees want to understand how their event experience can be made more efficient, while non-attendees need to understand what/how they'll learn at the event that they can't get elsewhere.

Most Important Event Elements

(% very/extremely important)

■ Recent attendees ■ Non-attendees



How XLNC Can Help Appeal to Non-attendees



XLNC Framework

If you're familiar with [Freeman's previous trends reports](#), you're familiar with Freeman's XLNC Framework.

If you're not, allow us to catch you up. XLNC (pronounced excellence) stands for **eXperience, Learning, Networking, and Commerce**. It's an objective-based framework that examines the four main reasons folks attend events.

As part of the Freeman Community Needs Surveys, we evaluate audience preferences related to experiential factors, learning and networking preferences, and how product/solution discovery is conducted.

Based on asking the same questions of recent attendees and non-attendees, we can identify what factors influencing XLNC are most likely to appeal to non-attendees.

[Download Report](#)

	<p>EXPERIENCE Have fun, achieve my objectives, enjoy the environment</p>	
	<p>LEARNING Be inspired, learn something new, receive training</p>	
	<p>NETWORKING Make connections, socialize with new and existing contacts</p>	
	<p>COMMERCE Evaluate vendor offerings, build awareness, discover new products/services</p>	

QUESTION

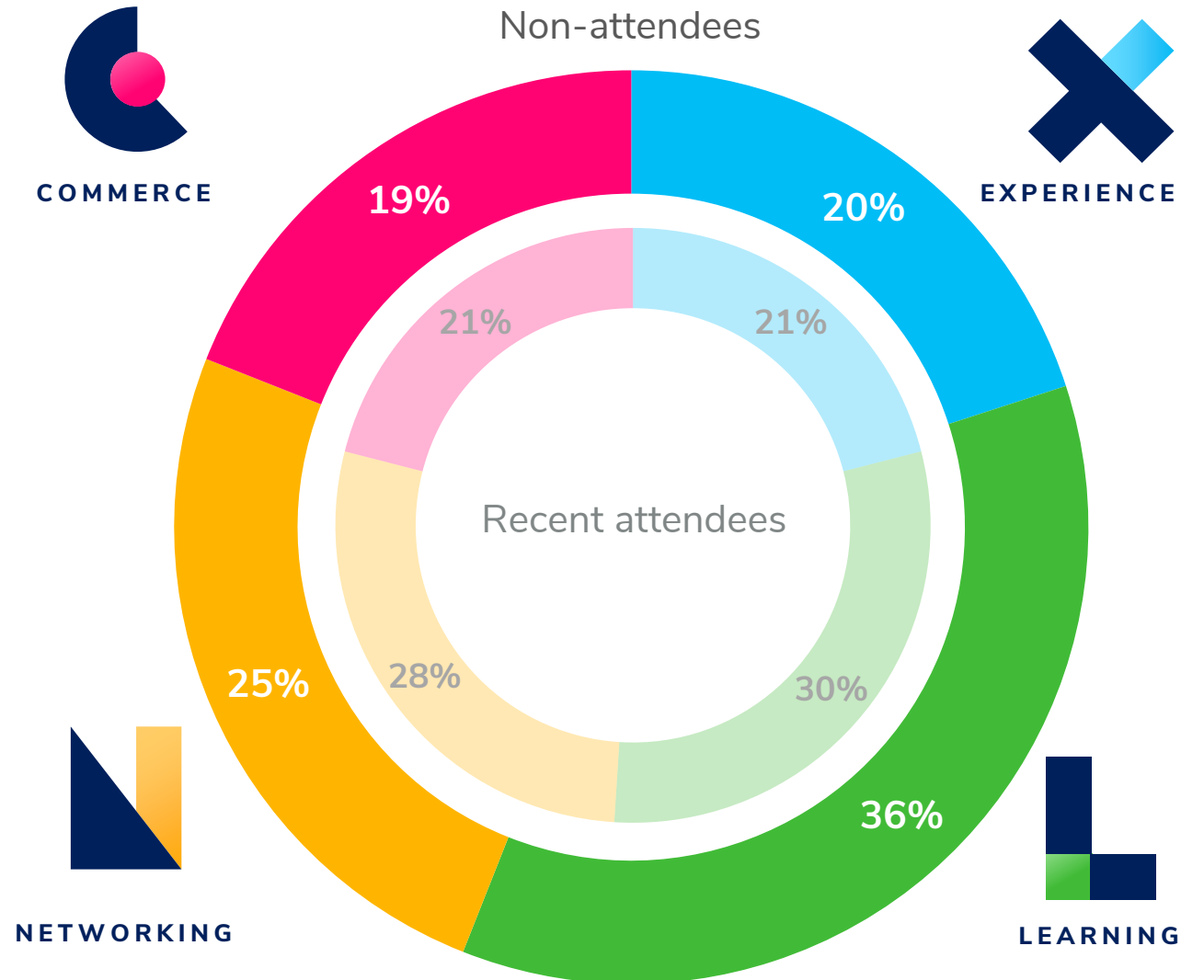
Allocate a total of 100 points across the below areas based on how important each component is to your overall experience at in-person events.

Emphasize learning aspects to attract non-attendees

Non-attendees will prioritize events that help them learn, making it easier to convince their employers that attending has value.

Recent attendees also prioritize learning elements but are more likely to build on them and consider networking and commerce components to also be a draw.

Importance of Event Components to Overall Experience



QUESTION

When thinking about your overall experience at any in-person event, what are the top 3 factors that most positively influence your experience?

What drives experience is achievement of objectives – aided by hands-on/immersive opportunities

Hands-on or participatory experiences are more likely to be viewed as a differentiator for the event among non-attendees.

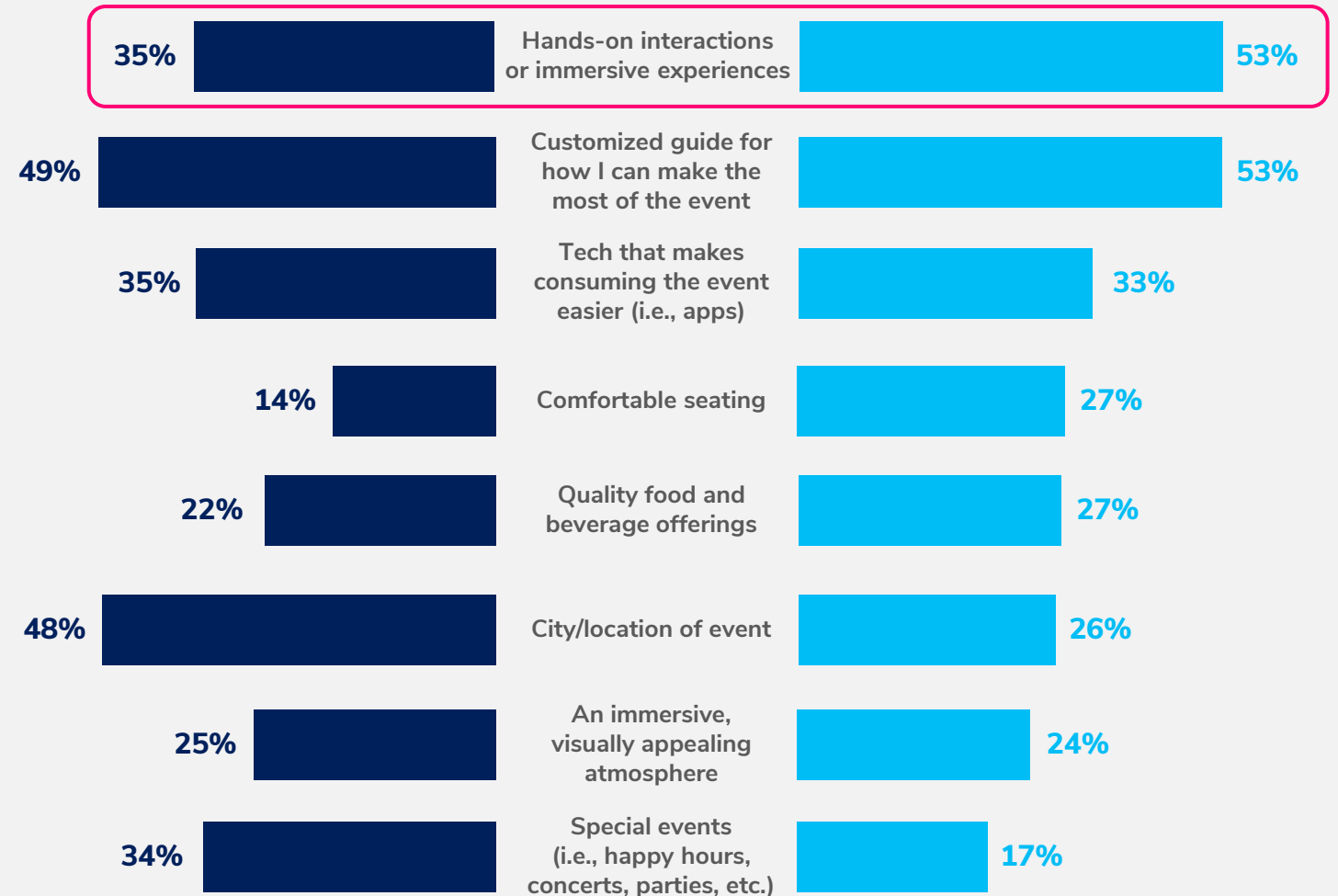
City/event location and special events are unlikely to be a draw for non-attendees, but recent attendees are more interested in these aspects.



Most Important Experiential Elements

Recent attendees

Non-attendees



QUESTION

When thinking about how you learn at any in-person event, what are the top 3 factors that most positively influence your learning experience?

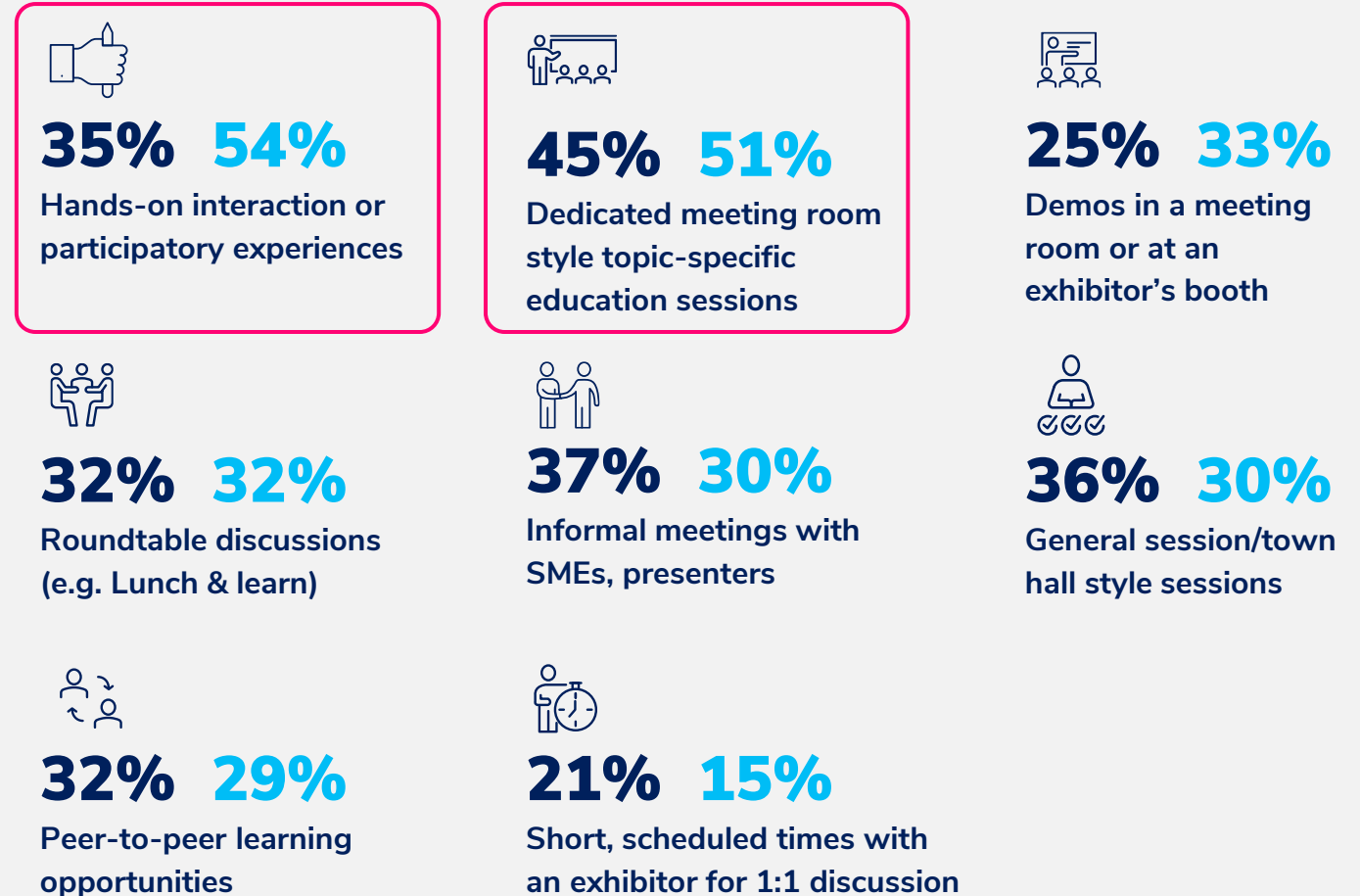
Non-attendees prioritize learning that is interactive or involves topic-specific sessions

Non-attendees indicate they are more likely to be drawn to learning elements that require in-person participation – a key differentiator organizers should incorporate into event education.

Learning that is networking-related or peer-to-peer in nature is more valuable for recent attendees.

Most Important Learning Elements

■ Recent attendees ■ Non-attendees



QUESTION

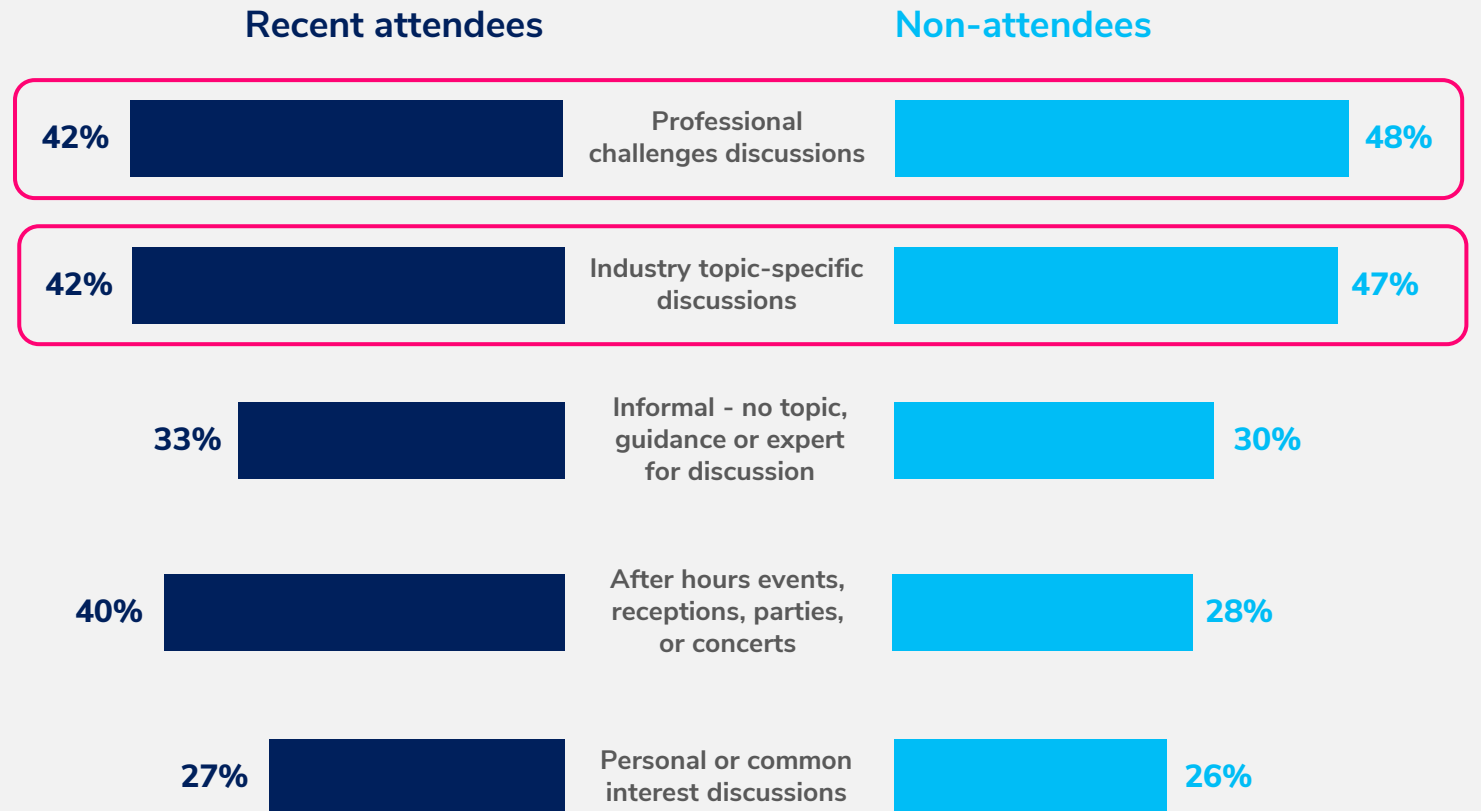
When thinking about networking at any in-person event, what are the top 3 factors that most positively influence your networking experience?

Networking must revolve around discussing professional challenges or industry-specific topics

After-hours events are more likely to appeal to recent attendees, likely due to already having contacts they prefer to meet with. Non-attendees are more likely to require professionally-oriented networking to consider this aspect of the event to be appealing.



Most Important Networking Elements



QUESTION

Think about how you build awareness of and evaluate products/services at any in-person event. What are the top 3 factors that most positively influence how you go about the evaluation?

Recent & non-attendees both require hands-on interaction or demonstrations to evaluate products and services

Recent attendees are also more likely to be receptive to after-hours events with vendors to discover and build awareness of offerings.



Most Important Commerce Elements

■ Recent attendees ■ Non-attendees



Action Items





Action Items

Organizers stand to attract more of their target audience by focusing on the characteristics non-attendees care the most about when considering professional events.

➤ Speak to what non-attendees consider their top work/career priorities

Non-attendees view training and advancement as key professional priorities. Leverage promotional content, social posts, and campaigns directed towards non-attendees to highlight how your event delivers on these goals.

➤ Lean into what attendees will learn at your event

Learning, specifically advanced education and hands-on or participatory elements, are of most interest to non-attendees. Target non-attendees with content that makes it clear what they seek to learn by attending your event and how in-person learning differentiates from alternatives.

➤ Call attention to networking that delivers substance – addressing professional challenges

Organizers should restructure networking to revolve around problem solving and specific topic-based discussion – not after-hours events. Make it clear to non-attendees that revamped networking is worthwhile, and welcome to those who do not know other attendees.

➤ Make it easy for non-attendees to understand what hands-on elements the expo hall features

Non-attendees require active participation and demonstrations in the expo hall. Ensure your event marketing makes it clear how the expo will improve awareness building and evaluation of products/ services.

Clarify your audience's priorities with a custom Community Needs Survey

Enhance your event design and marketing to address non- and returning attendee motivations and in-person event expectations.

Dig deeper than post-event or membership surveys

We customize your survey to identify how audience needs relate to expectations for attending your events.

Identify factors influencing attendance

Evaluate what current and past attendees value from attending events – and how that differs from those who have never-attended.

Understand other events your audience is attending

Get insights into what is driving attendance at competitor events.

Assess how your audience segments differ

Determine how factors like generation, purchase decision status, role, etc. influence your audience's perspective on what they value from events.

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Check out our page for more info on how Freeman Strategy can transform your event



Appendix

Respondent demographics

Respondent Demographics

Generation

Gen Z	4%
Millennials	36%
Gen X	37%
Boomers	21%
Silent	2%

Gender

Male	41%
Female	55%
Choose not to specify	4%

Year Attended

Most recent year (2024 or 2025)	30%
Previous year (2023 or 2024)	14%
2 years ago (2022 or 2023)	6%
Prior to the last 2 years (2021 or earlier)	16%
Never attended	34%

Respondent Demographics (Continued)

Type of Event

Conference	72%
Trade show	28%

Event Size

Under 5,000 attendees	25%
5,000-9,999 attendees	25%
10,000 or more attendees	50%

Industry

Medical/Healthcare	54%
Services	23%
Retail	7%
Manufacturing	3%
Technology	2%
Other	10%