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The Attendee Acquisition Reality Gap

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Why listen to me?

25+

years measuring exhibits & events globally

2,100+

Events, exhibits, keynotes, and sessions measured

1M+

attendee & exhibitor survey respondents

50+

attendee, exhibitor & sponsor benchmarks



Where the data comes from

106

Senior show organizers

Attendee Acquisition Reality
Gap Study. March-April 2026.

Research conducted by

EVOLIO
marketing

Lippman
Connects

Trade Show Executive

101

Exhibitors & event marketers

EVOLIO 2026 Exhibitor
Advocate Event Sentiment &
Outlook Study.

EVOLIO
marketing

THE
EXHIBITOR
ADVOCATE
AMPLIFYING THE VOICE OF EXHIBITORS

7

External sources

CEIR, U.S. Travel, Statistics
Canada, Freeman, Gartner,
Forrester, Responsive.

Five gaps that put attendee value at risk

01 First-time growth and repeat attendance

02 Travel costs and the case for attending

03 AI discovery and show visibility

04 Attendee needs and exhibitor fit

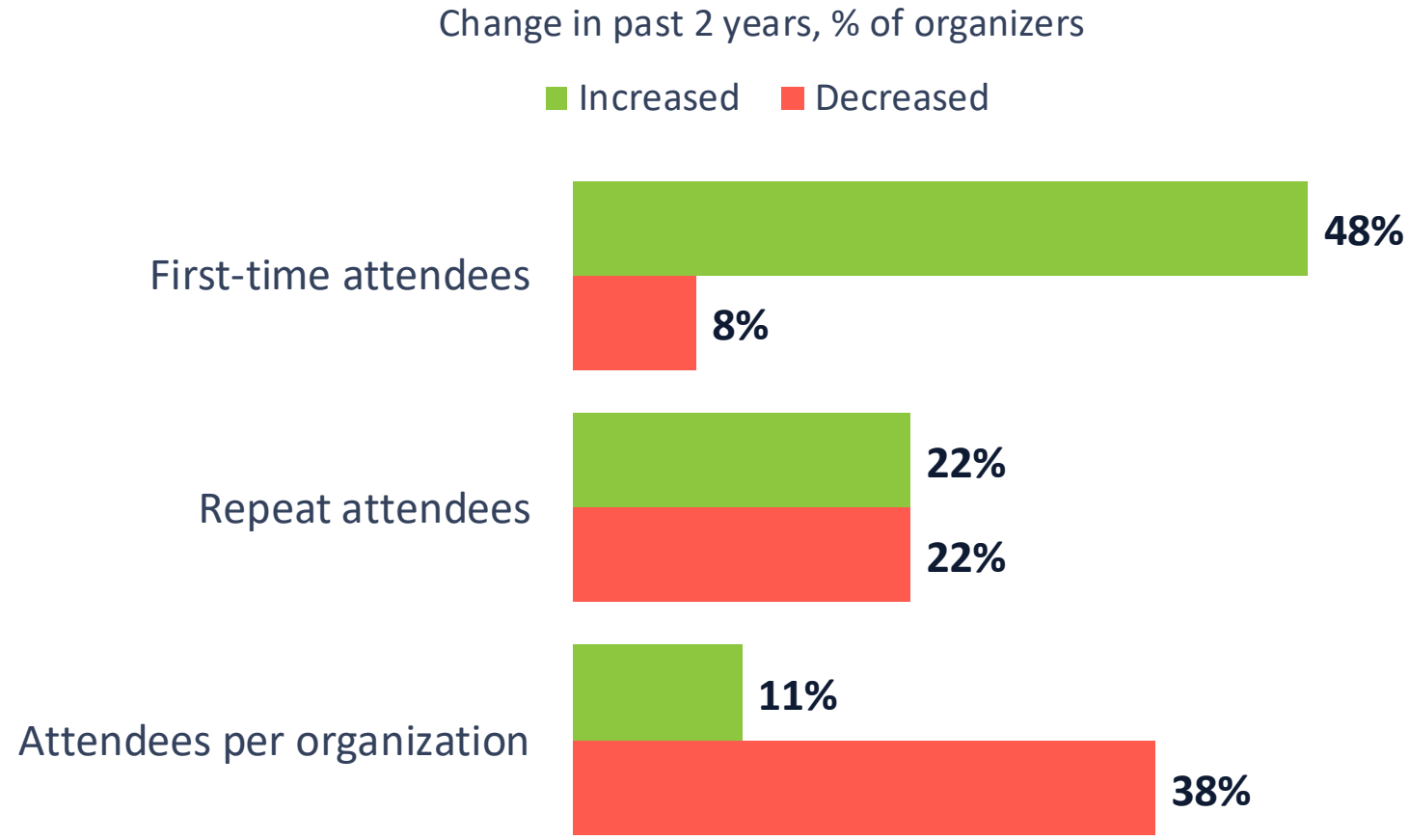
05 Email dependence and channel relevance

01

First-time growth outpaces repeat growth

Cohort retention shows whether new attendees come back

More organizers report first-time than repeat growth



48% vs 22%

of organizers grew first-timers vs. grew repeat attendees

Repeat attendees: as many shows lost them as gained them

Companies are sending fewer attendees. Especially to larger shows.

38%

of organizers report fewer
attendees sent per
organization

44%

of large shows (125K+ sq ft) report the drop

17%

of smaller shows report the drop

1 show. 40,000+ attendees. 2,500+ exhibitors.
10 years of trending data.

CASE STUDY: EVOLIO CLIENT RESEARCH | LARGE TRADE SHOW (ROTATES CITIES)

-12%

loyal attendees (attend 3
of every 5 shows; senior,
decision-makers)

~45%

of attendees are under
35. Assess buying role
separately from age.

80%+

reported decline in ROI
and sales-qualified leads
over 10 years

What's the #1 reason a first-time attendee doesn't return to your show?

First-time attendee retention plan

WATCH FOR

First-timer growth with flat repeats, and fewer attendees per company

Track the rate

Track who returns at the next edition, by cohort

A first-timer path

Orientation, a guide, a first-timer meetup and a host

Plant the seed

Thank you note and next year's pass offer within days of the show's close

60-day value check

Ask what they used, what fell short, and what would bring them back

Team pricing

Make it easy for companies to send more people, not as an afterthought

Stay in touch

What's new, webinars, community, and content between shows

02

Travel costs raise the bar for attendance

International and cost-sensitive attendees need a stronger reason to say yes

International travel recovery is slow

-5.8%

U.S. overseas arrivals
Jan–Aug 2026 vs. 2025
Excludes Canada & Mexico

+6.8%

Canadian return trips
from U.S.
Sept 2026 vs. Sept 2025
-34.8% Sept '25 vs Sept '24

2029

International visits to
the U.S. forecast to
exceed pre-pandemic
levels

*U.S. Department of Commerce, April
2026 forecast*

CEIR forecasts a +2.1% attendance increase below Sept 2024.

Travel indicators provide context, not a measure of trade-show attendance.

Participation costs more. For attendees *and* exhibitors

53%

of organizers raised
attendee registration fees
in the past 2 years
(avg. increase ~10%)

61%

of attendees would skip
an event because of
travel and hotel costs

55%

of exhibitors agree that
rising costs outweigh the
value

Exhibitors are responding: 55% send fewer staff, 64% scaled back presence, 40% cut shows.

What's the #1 reason a qualified prospect says no to your show?

A stronger business case for the trip

WATCH FOR

Late registrations, more no-shows, fewer international registrations

Justify-your-trip kit

By role, with the full cost and the expected return

Show the all-in cost

Registration, travel, and other rates up front, not buried

Win the drive market

Target regional attendees

Flexible passes

VIP, 1-day, expo-only, and team bundles

Support international

Early visa letters, in-country partner associations

Prove the audience

Share buyer roles and needs in aggregate to guide staffing

03

AI discovery adds another route to your show

Test whether AI answers describe your show accurately for the right audience

B2B research points to an AI discovery opportunity

25%

drop in traditional search volume Gartner predicted by end of 2026

~2/3

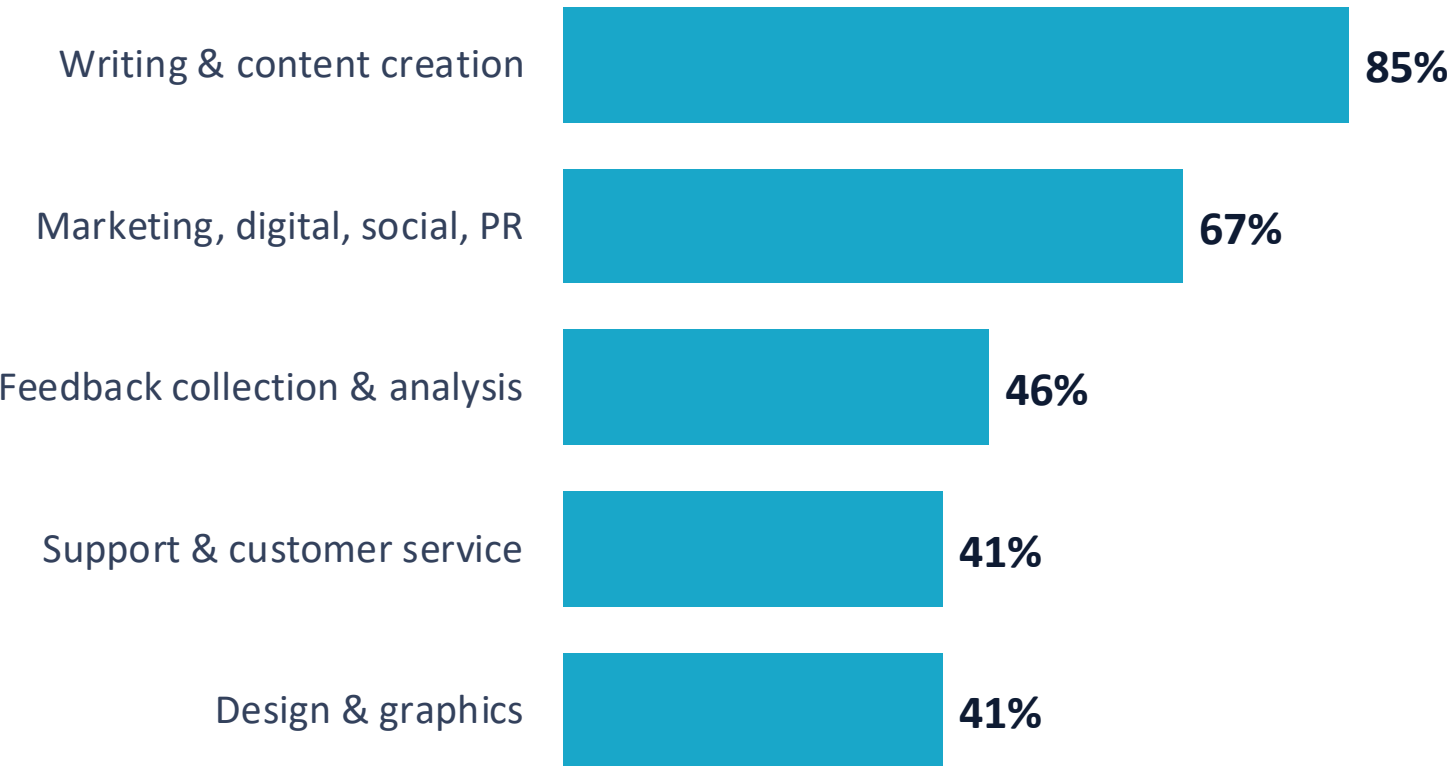
of B2B buyers use AI as much as or more than traditional search for vendor research

2/3+

of buyers in \$1M+ B2B deals will be Millennials or Gen Z by 2030

Content creation leads reported AI use

Top AI use cases, % of organizers using AI



25%
don't use AI at all

33%
of users: too soon to see results in efficiencies

Search visibility, direct answers, and recommendations

SEO

Search Engine Optimization

Rank in search results and win the click

EXAMPLE

Your show page ranks for "manufacturing trade show 2027"

AEO

Answer Engine Optimization

Be the direct answer in AI Overviews, snippets and voice

EXAMPLE

"When is [Show] 2027?" is answered correctly from your FAQ

GEO

Generative Engine Optimization

Get recommended in ChatGPT, Gemini, Copilot, Perplexity

EXAMPLE

"What events should a plant manager attend?" names your show, high-level overview, and why

AI discovery exercise: a buyer-focused prompt



Illustrative persona: a plant manager evaluating automation

“Which U.S. events in 2027 would help me compare suppliers and plan a purchase? Include dates, location, fees, relevant exhibitors and evidence links. Explain the fit and flag unknowns.”

AI discovery exercise: how to judge the answer



Check relevance to the buyer's role and purchase need.

Verify dates, venue and fees against official sources.

Check named exhibitors and the evidence behind the recommendation.

Record the tool, date and prompt. Repeat the test after fixes.

Ask the AIs for the top events in your industry. Is yours on the list?

If so, how is it described? Is it accurate? Is it enticing?

A practical AI visibility test

WATCH FOR

Your show missing from AI answers, or named with wrong dates, fees or venue

Facts in plain text

Dates, venue, fees, hours on main pages, not buried or in a PDF

Answer real questions

An FAQ written the way attendees ask

Who should attend

Spell out the unique value for each role you want

Crawlable lists

Exhibitors and sessions AI can actually read

Third-party mentions

Press, speakers, exhibitors, past attendees, influencers

Test monthly

Repeat the same prompts monthly. Log mentions, accuracy and buyer fit.

04

Attendee needs and exhibitor fit

Relevant content and buyer access belong in the same acquisition plan

New products and industry trends lead attendee reasons

75%

attend to see new products, services or innovations

69%

attend to keep up with industry trends

49%

attend to network with peers or industry professionals

ATTENDEE/EXHIBITOR ALIGNMENT

EXHIBITOR PRIORITIES



Who exhibitors want to see

=

ATTENDEE OPPORTUNITIES

Attendee growth opportunities:
Companies, job roles, industries



What exhibitors showcase:
In-booth and beyond the booth

vs.

What attendees want to see, buy and learn:
Identify gaps to enhance the attendee experience



How exhibitors want to interact
In-booth and beyond the booth

=

Attendee activity opportunities:
Ways to interact and connect

BUSINESS OUTCOMES

Meetings, new connections and planned purchases by product category

Registration data can make outreach more relevant

COLLECTED AT REGISTRATION

- Role
- Interests
- Industry
- Purchasing authority



THE TEST

Does each audience segment see relevant sessions, exhibitors, and reasons to attend?

91% rely on previous attendee lists to prospect. How are you expanding and enriching your contacts?

When was your program last updated based on attendee feedback about why they attended and what could be improved?

An attendee-led program with exhibitor value

WATCH FOR

High satisfaction scores with falling repeat rates. Full sessions, empty aisles.

Ask why they came

Every year, on the post-show survey. Then use it.

Promote the floor

Promote launches, demos, education, and new exhibitors like you do keynotes

Match tracks to the floor

Align session topics with exhibitor categories

Curated connections

Match buyers to relevant exhibitors, and other attendees, and track meetings held

Hands-on formats

Labs, demos and workshops on the show floor

Agendas by role

Use registration data to build each attendee's plan

05

Email dependence and channel relevance

Channel preference and qualified attendance should guide the mix

100% use email. 70% say firewalls block it.

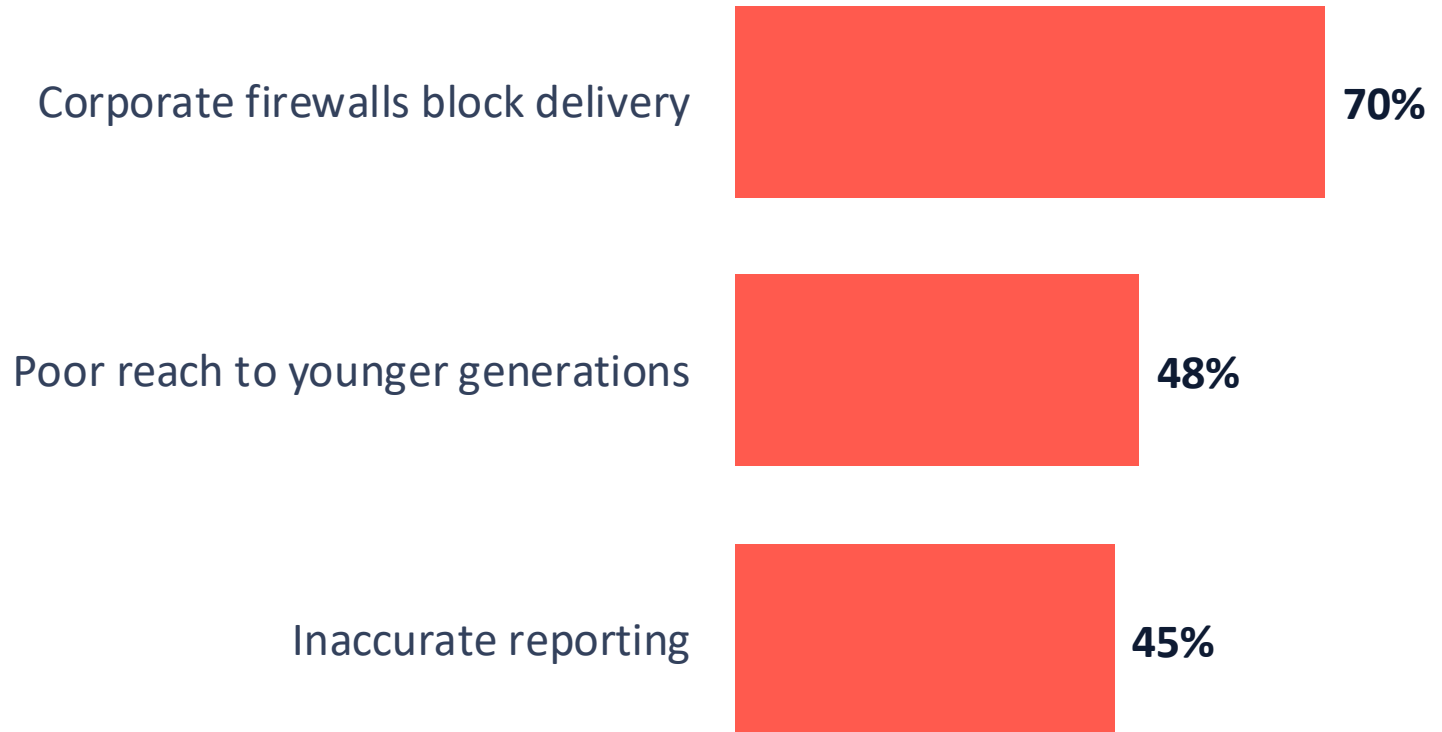
100%

use email blasts

50%

call it the most effective tactic

Email challenges, % of organizers



The younger-audience blind spot

48%

say email doesn't connect with
younger generations well

3%

rank reaching younger audiences
as their top challenge

57% don't vary acquisition by age.

55% don't ask channel preference or are unsure.

Which channels bring qualified attendees, and how do you know?

A channel mix measured by qualified attendance

WATCH FOR

Falling email response, aging registrant mix, few referrals from attendees

Creator & member voices

Short video from real attendees and speakers

Peer-to-peer invites

Make it easy and rewarding to bring a colleague

Exhibitor-powered passes

Give exhibitors trackable invites for priority customers

Opt-in text & messaging

Short, timely and personal in the last 4 weeks

Segment tests

Compare cost per qualified attendee across channels

Ask their preference

Question at registration: how should we reach you?

Proposed 30-day priorities and owners

- 01** Marketing + analytics: define the returning-attendee cohort.
- 02** Marketing: test a trip-value case with priority buyer roles.
- 03** Digital lead: test 5 AI prompts and correct inaccurate facts.
- 04** Sales + exhibitors: agree buyer-fit and meeting measures.
- 05** CMO: assign test budgets and review qualified-attendee cost.

Shared acquisition and ROI scorecard

KPI	What it tells you	Where it comes from
First-timer return rate	Share of a first-time cohort at the next edition	Matched registration history
Attendees per organization	Depth of attendance within each account	Registration by company
Buyer Density Index (BDI)	Buyer authority and spend capacity, 0–100	EVOLIO attendee survey
AI visibility rate	Prompts naming the show correctly (%)	Dated monthly prompt tests
Qualified-attendee cost	Acquisition spend / qualified attendees	Spend + registration by channel
Worth the time & cost	Perceived value and intent to return	Attendee survey by segment
Qualified meeting conversion	Sales-accepted leads / qualified meetings held	Exhibitor CRM + meetings
Realized exhibiting ROI	(Attributed gross profit – total cost) / total cost	Exhibitor CRM + finance



Feelings Aren't Facts®

Questions? Let's talk about your data.

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Sources

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