# Registration Insights Report

**Optimizing revenue and attendance in the face of new attendee behavior**

Registration Insights Report Sponsored By

# Background

There's been a lot of buzz in the event industry about how attendee behavior has shifted post-pandemic, specifically the fact that people are waiting longer to commit to attending an event. Last-minute registrations spiked during the COVID years. While patterns have now (mostly) normalized, nearly one in four attendees (22%) waits until the **final week** before the show to register. Nine percent don't register until they arrive on site.

This is not exactly welcome news for those of us who plan events. We spend months or even years thoughtfully planning, only to find ourselves short on staff, supplies and space – not to mention facing costly damages from suppliers in some cases.

Many event industry leaders have taken to social media bemoaning the problem of late registrations, usually asking the question,"how can we make attendees do what we want?" (And while we're at it, can we make them read the know-before-you-go?)

But battling your customers has never been an effective business strategy.

We wanted to know how we could work **with** attendee behavior rather than against it. Doing this requires understanding who is registering late and why – and how we can align our marketing, pricing and logistic strategies to optimize attendance and revenue.

**To do this, we analyzed more than 360,000 attendee registration records over a three-year period to identify patterns in who was registering late and how their spending and behavior differs from early registrants.**

We hope these findings stimulate dialogue, experimentation and change. They did for us.


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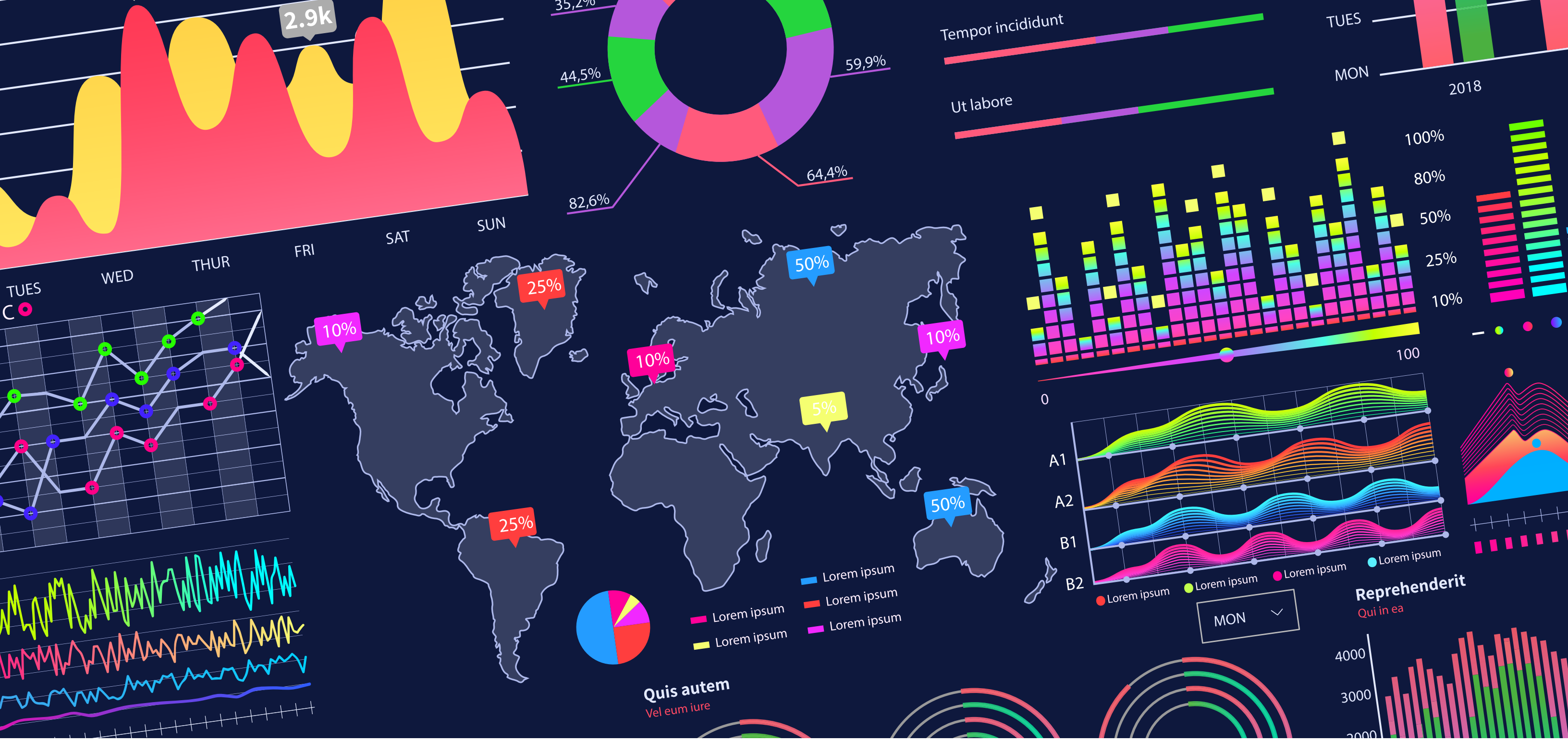
We studied more than **360,000** registrations

# An approach that gives confidence

Several aspects of the methodology used in this study build confidence in the findings and offer a unique vantage point:

- **Large sample** We studied more than 360,000 registrations across 30 trade shows (and 90 show instances), spanning diverse industries.
- **Pre- and post- comparison** We examined the same 30 trade shows over three years for an accurate 'apples-to-apples' comparison pre- and post-COVID and to reduce sampling bias.
- **Behavioral data** While many surveys have been conducted to understand attendee attitudes and preferences, this study looks at actual attendee behavior when faced with real-life decisions.
- **Spend data** Because we manage registration for all the shows included in our sample, we are able to look at attendee spending behavior, including both registration fees and add-on items.
- **Replicability** Other studies of post-pandemic attendee behavior have found similar incidences of late registrations as this study found, giving us a confident foundation to build upon.




# What the data tells us

## The COVID halo effect: last-minute decisions

When we studied the behavior of these conference-goers over a three-year period, we found that an astounding 45% delayed registration until less than four weeks before the event.

Contrary to popular discourse, late registrations aren't a new phenomenon. They were prevalent even before COVID. But the pandemic didn't do us any favors. The number of late registrants spiked during the COVID era as people waited until the last minute to commit. In 2022, as shows were just starting to come back to in-person, nearly one quarter of attendees – 24% – didn't register until the week of the event.

Even in 2023, late registrations have lingered: more than one in four attendees (29%) waited until the final two weeks to register – up from 23% in 2019. An alarming 9% registered on site.

**45% delayed registration until less than four weeks before the event**

**Why are we still waiting longer to commit?** Hard to say. One explanation might be that we're out of practice at attending live events now that we've reconfigured our lives, often toward remote working. Being face-to-face with thousands of people can feel daunting. Do I have business casual attire that's still in style? Who will walk the labradoodle I got during the pandemic? Who will pick up the kids and change over the laundry?

# Havoc for organizers

We probably don't need to tell you that the late registration trend is a thorn in the side of show organizers. The consequences range from logistical to financial.

## Logistical challenges may include:

- Lack of hotel rooms/sold out blocks
- Convention center strain, adding last-minute F&B, session rooms and space
- Transportation/shuttle adds
- Limited supplies of badge stock, on-site equipment, etc.
- Support staff strain

## Financial consequences to organizers may include:

- Missing out on revenue from bookings in the block if hotel cutoff dates have passed
- Attrition damages if the block didn't fill
- Surcharges from suppliers

It's also worth mentioning that registering too late can negatively impact not just the organizer, but the attendee. For example, it may mean a less-than-optimal experience if they miss out on the ability to plan their time well and arrange meetings with valuable contacts, or they may face difficulty finding a hotel close to the event location.

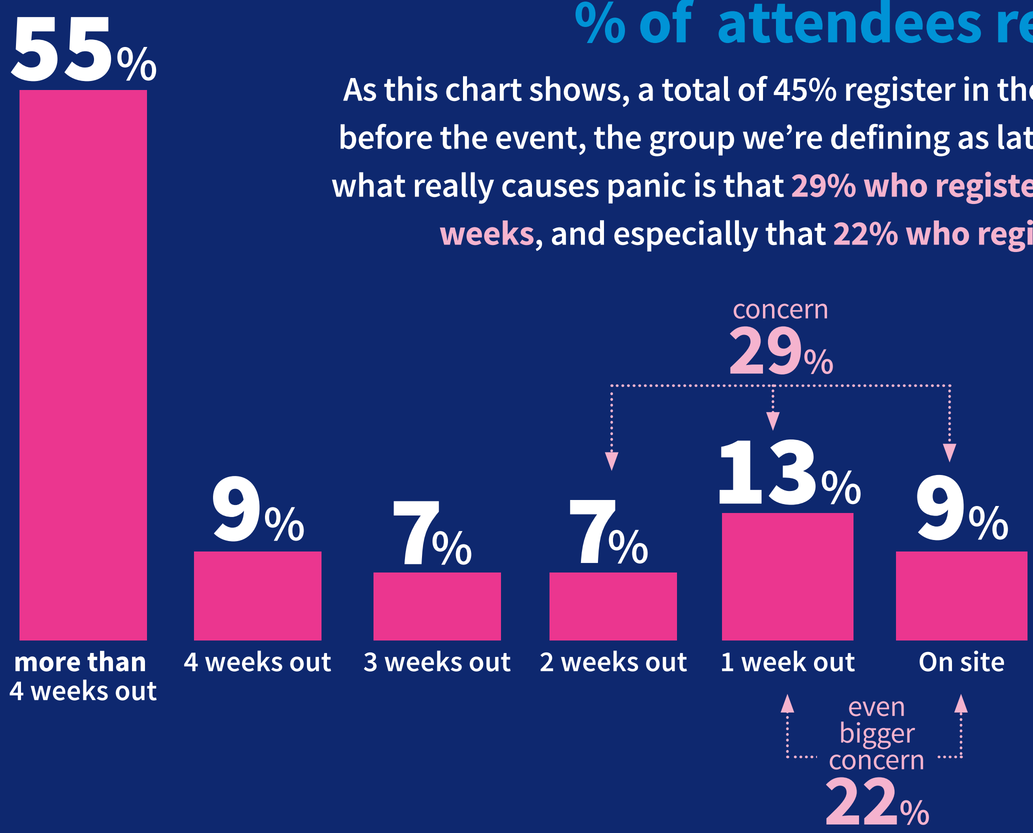
# Looking more closely at **late registrations**

When event organizers worry about late registrations, what they're often most worried about are the **really** last-minute ones. The ones who turn up mere days before the event or on site, throwing a wrench in months or years of thoughtful planning.

Let's have a closer look at registration pacing in 2023:

## % of attendees registering

**As this chart shows, a total of 45% register in the final four weeks before the event, the group we're defining as late registrants. But what really causes panic is that 29% who register in the final two weeks, and especially that 22% who register the week-of.**




## Who's registering late

It turns out, not all attendees are created equal. For one thing, exhibitors are slightly more likely than attendees to register late – 48% of exhibitors register in the last four weeks vs. 45% of attendees. While their companies surely commit to exhibiting long before that four-week window, who and how many staff they send to man their booth may be a last-minute call.

We also found that those who register late are more likely to be:

- First-time attendees
- Concentrated in certain industries
- Attendees in driving distance

# First-timers

## are more likely to register late.

Almost twice as many first-timers register late as repeat attendees who register late (47% vs. 25%). Said simply, your veteran attendees aren't the problem: 75% of them are registering early.

This likely matches your intuition. Those who have never attended your show are more on the fence about whether it'll be worth it. They may be waiting for peers and colleagues to pull the trigger first.

**Do you know how many of your attendees are first-timers? This is one predictor of late registration!**

# Certain industries

## are more likely to register late.

**Does your audience tend to be rule followers or renegades? Your industry may be a factor!**

We also found variation by industry. In sectors we might think of as being comprised of rule-followers (think: teachers, doctors, and legal or financial professionals), late registrations are less common. As a case in point, at medical and healthcare conferences, only 29% registered late – much lower than the overall average of 45%. Contrast this with food and restaurant shows, where 54% register late.

One factor that may explain this is educational credit and certifications. In the medical, education, financial and legal professions, shows may be more likely to offer CE credits, which may drive earlier commitment from attendees. It's worth surveying your audience to see how big a driver this is for them. If it is, promote it front and center.

Industry demographic can also correlate with a lot of other factors that impact the real-life decisions your attendees face. Some attendees have more scheduling constraints professionally or personally that make it harder for them to plan in advance – from their field of work to their life stage and gender. A 32-year-old woman with young kids faces a very different set of pressures than a 58-year-old male empty-nester. Again, worth more research on your audience.

## Those within **driving distance** are more likely to register late.

When we looked at attendee zip code and travel distance to events, we found that those who live within driving distance of the event (defined as within 250 miles of the event location) are much more likely to register late. This feels logical. If you know you'll need to fly to the event, you'll probably try to make plans at least a month in advance to avoid a spike in airfare.

Nearly two-thirds (62%) of attendees who live within driving distance register late, while only 39% of attendees who fly register late. Stated differently, for every 1,000 attendees who live within driving distance of your event, you can expect 620 of them to register in the final four weeks – a useful indicator if you're able to do some zip code analysis of your attendees and how far they'd need to travel to your event location.

Consider which states have the highest percentage of their show populations registering late (see below). You may notice that locations with a large drive-in population like Nashville have a higher percentage of late registrants than less centrally located cities like New Orleans.

### Event locations with the **highest percentage** of late registrants:

**Tennessee (Nashville) – 81%**
**New York (New York City) – 63%**
**Florida (Orlando, Miami, Tampa) – 56%**
**Texas (Houston, San Antonio, Dallas) – 56%**
**Ohio (Cleveland and Columbus) – 54%**
**Georgia (Atlanta) – 50%**

### Event locations with the **lowest percentage** of late registrants:

**Minnesota (Minneapolis) – 22%**
**Washington (Seattle) – 24%**
**Hawaii (Honolulu) – 27%**
**Louisiana (New Orleans) – 29%**
**Arizona (Phoenix) – 36%**

It follows, then, that you might plan accordingly for a spike in last minute attendance if your event city has a large drive-in market – if it's located near large population centers or large concentrations of your attendee demographic (think tech shows located on the west coast or pharmaceutical or financial conferences in the tri-state area).

If your event is in New Orleans, Seattle or Phoenix, you probably won't have as many late registrants because not a lot of people live within driving distance. But if your event is in Nashville, plan accordingly!

**Is your event located within driving distance to a large swath of your audience? Plan accordingly for more late registrations.**

## Challenging the holy grail:

# late attendees aren’t bad attendees

Up until now, we’ve treated late attendees as a problem to be fixed.

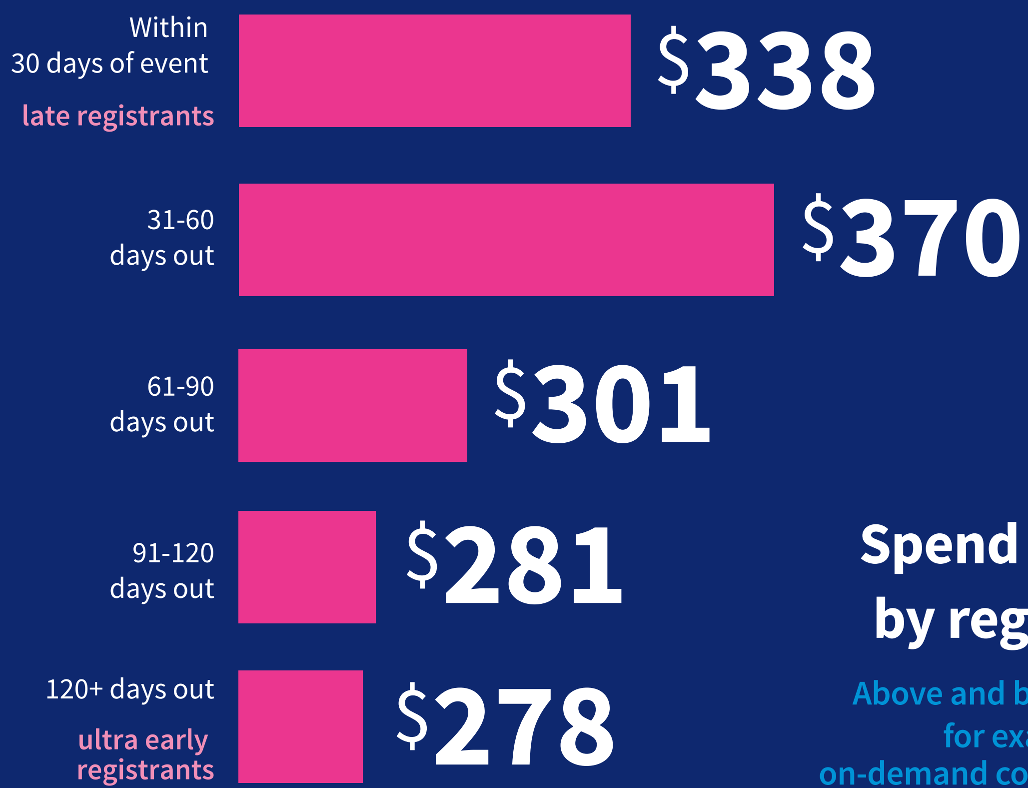
But here’s the showstopper: late attendees are actually **good** attendees, from the perspective of spending more at your show than their earlier counterparts. **Late registrants spend more on show offerings than early registrants - even when we factor out early-bird discounts.**

This bears repeating: Even when we completely remove registration fees from the equation (since we know late registrants are often charged a higher registration fee compared to early birds), late registrants spend more on ancillary show offerings. They are more likely to add on sessions, on-demand content, social events and more.

**Specifically, those who register in the final four weeks before the event on average spend $59 more compared to those who register more than 90 days out.**

# Getting more granular on spend patterns

Here's how much attendees tend to spend over and above their registration fees based on when they register:




**Spend per attendee, by registration time**

Above and beyond registration fees, for example, add-on sessions, on-demand content and social events.

## A few things jump out here:

- Those who register within the 60 days before the show spend the most, with the 31-60-day window being the sweet spot.
- Outside of this 60-day window, the earlier they register, the less they spend.
- Registering early has a negative impact on spend.

**That's right:** those early birds we try so hard to lock in? They spend on average $92 less than those who register in the 31-60 day window. Again, that's not even counting the lower registration fee they pay, which further exacerbates the difference.

# Why do early registrants spend less?

We have a few theories:

- Early registrants are registering before full show offerings are available. Show organizers often launch registration very early – 6, 7, 8 months in advance – before the website has all show offerings available. Once these early birds complete that registration, they're not likely to return to the site to purchase add-ons later (as much as we try to make them). The late registrants are seeing full show offerings at the time they register, making it easy to purchase them at one time.

- Early registrants are 'rinse and repeat' attendees. We said earlier that early registrants are more likely to be your repeat attendees that come back year after year. The first-timers may delay their decision to attend, but once they do, they're all in. They're making a deliberate choice to attend, rather than going on autopilot, and they're motivated to maximize their investment. This is reflected in their purchasing more show add-ons.

- Early registrants are more price-sensitive – hence they register early to take advantage of a reduced rate and purchase fewer add-ons.

You may have other ideas about what's driving this – there's probably multiple things at play!

**The earliest registrants spend on average $92 less on added show offerings than those who register late. Are you leaving money on the table by opening registration too early – before full show offerings are available?**

# Putting the data to use

## Finding the sweet spot

We know now that registering too early has a negative impact on revenue. But we also know that registering too late – four weeks or less before the event – causes logistical havoc and, in some cases, financial damages from suppliers.

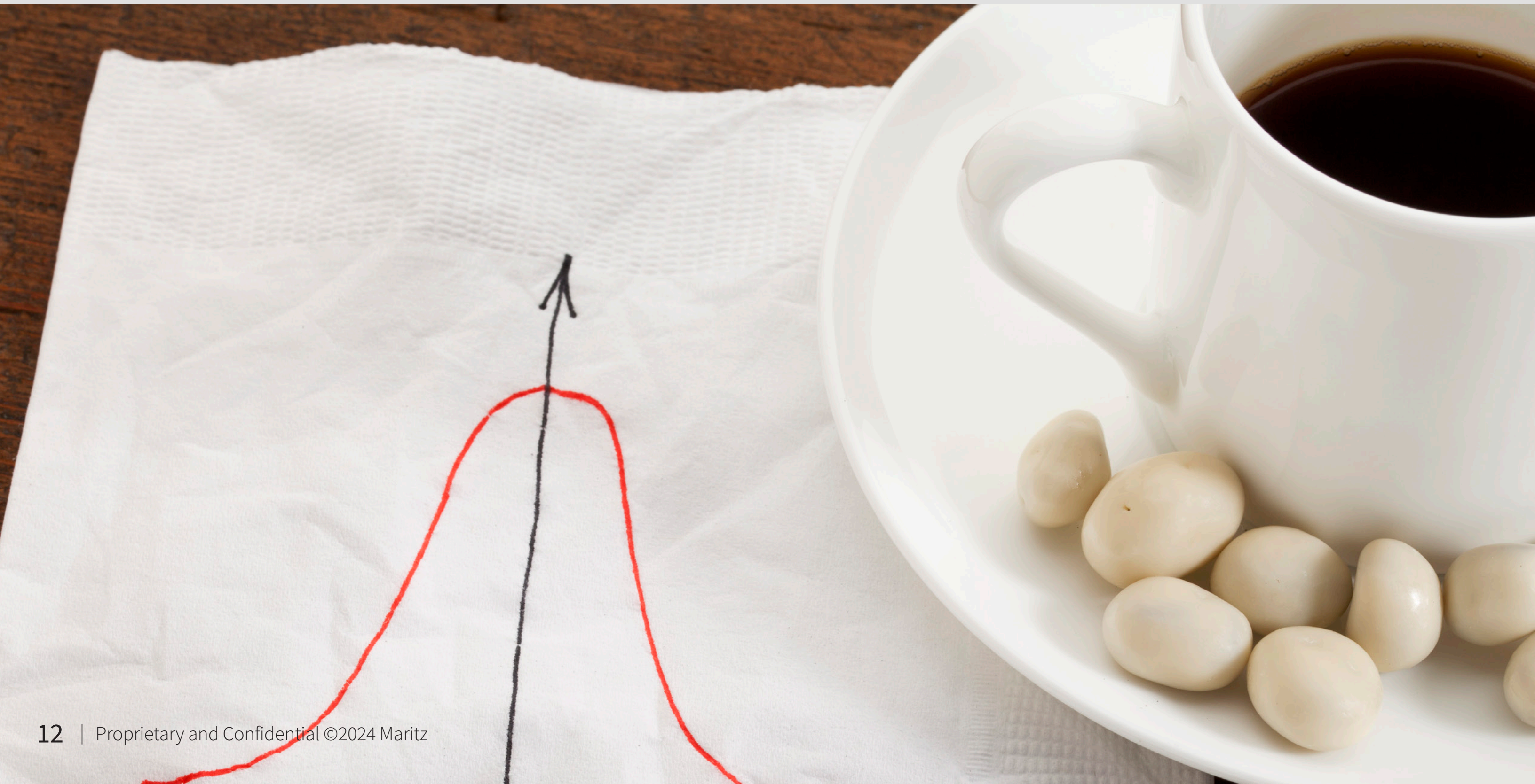
So when is the optimal window to register?

This data suggests the optimal window is 31-60 days before the event. It behooves organizers to hit the pavement hard in this lucrative window to get as many registrations as possible.

Perhaps more practical and realistic, driving registrations within the 31-120-day window offers a healthy balance between optimizing revenue and enabling effective planning.

The takeaway? Try to mitigate both extremes – the ultra-early and ultra-late – and find that happy medium.

**31-60 days before your event is the most lucrative window to drive registrations. More practically, aim to drive your registration volume within the 31-120-day window.**



# Strategies to optimize attendance and revenue

If our goal is to get those really early and really late extremists to shift to the 31-60 (or 31-120) day window, it is worth revisiting our strategies to ask if they're still serving us well. The following are some thought-starters to consider:

# Optimizing your marketing

- **Don't open registration too early** – Avoid missing out on revenue from opening registration many months in advance before your show offerings are fully available. If you must open early, make it a 'soft launch' and save your biggest marketing push for closer to the show date.

- **Use FOMO and exclusivity** – Consider offering unique privileges and exclusive offers (for example, networking access to VIP speakers and experts) to those who register within your optimal timeframe – and create a bit of fear of missing out if they register too late.

- **Make registration easy** – We've talked elsewhere about simplifying your registration form to avoid frustrating your attendees – and causing them to abandon the process. Only ask questions if you'll truly use the information provided. For those who start the registration process without completing it, seek to understand their reasons. If appropriate, send targeted communications to overcome objections.

# Optimizing your logistics

- **Plan accordingly** – Knowing that 45% register in the final four weeks, plan for this pattern to avoid surprises. Order that extra badge stock, hire more temps and don't reduce your hotel room block just because they haven't filled yet.

- **Look at your unique data** – We've identified some predictors of late registration – such as living within driving distance of the event and being a first-time attendee. Looking at this data for your own show – including your data from past years – can give you a better idea of what to expect.

# Optimizing your pricing

- **Rethink early-bird discounts** – Maybe it's time to leave this mainstay of the industry back in 2019. Not only are these time-based discounts not driving the behaviors you want, but you might be giving away money to the very people who would attend your show regardless: those repeat attendees.

  **Some show organizers have experimented with alternate pricing models like promo codes or discounts targeted toward specific groups like first-timers or students. Find some examples in the list below.**

- **Align with new attendee behaviors** – If you're not ready to part with early-bird rates quite yet (or you're worried your audience will revolt), consider offering a less generous early-bird rate or keeping the rate flat up until four weeks before the event, when the rate jumps much higher. Align those early-bird rates with that 31-120-day window you want people to register.

### Tiers with differing access
For example, some are offering one price tier that gives access to the exhibit hall only, while another tier grants access to the full conference.

### VIP packages
Some are offering elite benefits for those willing to pay – think anything from front-row seats at keynotes to speaker access to luxury suites and limo transfers.

### Rethinking early-bird pricing
Some are moving early-bird dates later or adding a middle tier to better align with attendee behavior.

### Tiers with session flexibility
This model gives access to more benefits as you move up – for example, entry level includes one keynote and two breakouts, mid-level includes two keynotes and five breakouts, etc.

### Targeted discounts
Some are offering creative discounting via promo codes, sometimes targeted toward specific groups – first-timers, students, adjacent audiences, etc.

### Bundling with membership
More associations are bundling memberships and registration fees together as a pricing package.

# Final thoughts

Up to this point, we've talked about what event organizers can do to maximize success in light of shifts in attendee behavior. But we'd like to take it a step further and talk about how this data can help spark discussion between event organizers, suppliers, and destinations for mutual gain.

One could argue that as an industry, we're operating under an outdated set of rules. In spite of well-documented shifts in consumer behavior, with almost half of attendees registered in the final four weeks, supplier cutoff dates are still typically 30 days from the event date, forcing organizers to make critical decisions before their full audience has materialized.

The consequences can be costly: giving away hotel rooms in their contracted blocks that they could have filled and losing out on revenue from bookings in the block – not to mention possibly paying attrition or damages to various suppliers for failing to meet minimums.

Before we point fingers at this suppliers' market that gives suppliers the upper hand in negotiating, let's be fair to both sides. Think about it from a hotelier's point of view: they got burned to the tune of millions during COVID and their owners are trying to recoup losses. Revenue managers are under pressure to make sure rooms don't go unfilled. Asking them to hold rooms in a block that may not fill exposes them to risk – especially when they could have sold these rooms to the general market at a lucrative rate. They might even say it's the event organizers that need to get with the times and be willing to pay deposits up front or provide more of a guarantee on room blocks.

So what would help them mitigate their sense of risk and be more comfortable compromising?

You guessed it: data. Evidence you'll fill your block.

With that, we'd like to add a final piece of advice:

**Rethink holding your registration data close to the vest. Consider sharing it with suppliers and destination bureaus so all parties have a line of sight into what to expect. By sharing your data and communicating transparently, suppliers might be more willing to play ball.**

Will you get everything you want? Maybe not. But even getting your hotels to extend the cutoff date by a week or two or offer a tiered rate after the cutoff can improve your bottom line.

**Knowledge is power, and we hope that greater knowledge spurs richer dialogue with all stakeholders involved.**

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