

November 2023

| Lippman Connects: Midsize Show Roundtable

ATTENDEE ACQUISITION & EXHIBIT SALES CHALLENGES & RESEARCH

Presented by Joe Federbush



1

WHERE WE'VE BEEN RECENTLY



WORKING WITH MAJOR BRANDS/EXHIBITORS/SPONSORS

intel.

servicenow.

SONY

Lenovo

DELLTechnologies

SIEMENS
Healthineers

Lilly

Canon
CANON MEDICAL SYSTEMS USA


novo nordisk®

 Pfizer

 HENRY SCHEIN®

TATE & LYLE

 Miller.



EVOLIO MARKETING

**Business Intelligence & Analytics: Attendee & Exhibitor Surveys,
Concept Testing Research, Conjoint Analysis, Price Point Sensitivity Testing**

**Focus Groups
& In-depth
Interviews**

**Portfolio
Optimization &
Data Analytics**

**Behavioral and
Sentiment Analytics**

**Mystery
Shopping**

**Brand
Ambassador
Training &
Management**

Exhibitor Strategy Meetings & Workshops

KPI Playbook Development

ATTENDEE ACQUISITION CHALLENGES

MIDSIZE SHOW ADVANTAGES

Compared with large shows, midsize shows (<125,000 sq ft)...

...tend to be more vertically focused on specific industries/sectors with specialized audiences & provide niche/targeted content

...offer more targeted networking opportunities because of more focused & fewer attendees compared with larger shows

...have more flexibility to rotate or change locations because there are more venue options to accommodate the exhibit hall size, keynote & session rooms

MIDSIZE SHOW CHALLENGES

Midsized shows have unique challenges...

...they **compete against the larger shows** that exhibitors feel they must be at, which requires larger investments, potentially taking budget away from midsized shows

...among exhibitors that participate in larger shows, midsized shows may be **considered second tier** events, allocating less budget and placing less emphasis on promoting their presence, pre-, during-, and post-event

ATTENDEE ACQUISITION CHALLENGES RANKED

1

52%

Attracting
quality
attendees

2

26%

Attracting
more
attendees

3

19%

Finding new
prospective
attendees (1st
timers)

4

3%

Attracting
younger
attendees
(Millennials and
Gen Z)

Source: Lippman Connects & EVOLIO Marketing Attendee Acquisition (AAR) Survey September 2022 and March 2023. N=77



Millennial: born 1981 and 1996.

27 to 42 years old now. 22% of U.S. population.

Gen Z (Zoomers): born 1996 and 2012.

Oldest are 28 years old. 21% of U.S. population.

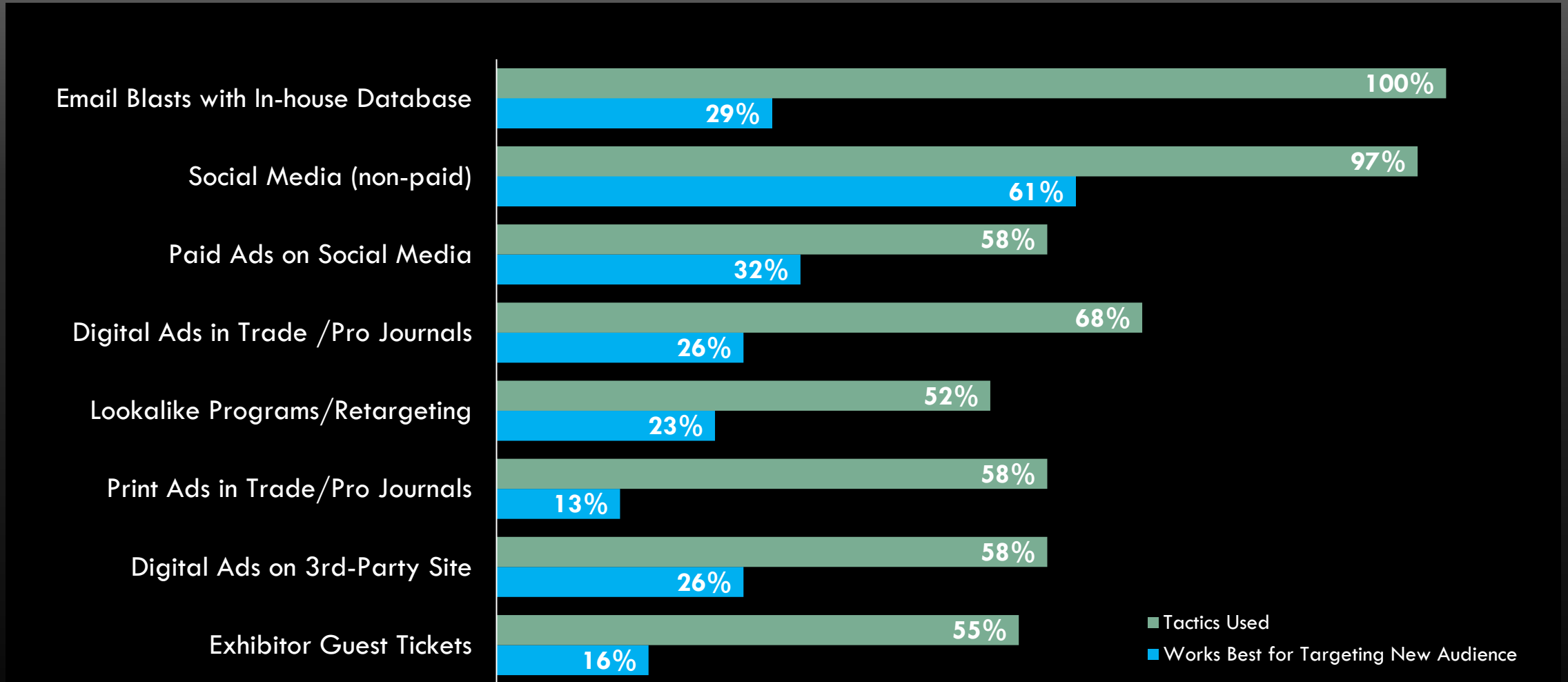
64% constitute business buyers.

33% are business buyers who purchase through self-guided digital channels.

These groups are more demanding, engaging in more buying activities, and more willing to express dissatisfaction.

Source: Forrester Research

TACTICS & SUCCESSES FOR ATTRACTING NEW ATTENDEES



Source: Lippman Connects & EVOLIO Marketing Attendee Acquisition (AAR) Survey September 2022 and March 2023. N=77

ATTENDEE PROFILES

43

Average
age

10% Gen Z

40% Millennials

32% Gen X

18% Boomers

49%

1st time
attendees

80% Buyers

29% Decision-makers

ATTENDEE PREFERENCES AND EXPERIENCE

79%

Likely to attend
again
(extremely/very likely)

82%

Satisfaction with
exhibits visited
(extremely/very satisfied)

67%

Anticipate making a
purchase in next 12
months

+37

Net Promoter Score® of
brands (exhibits) visited

Top Reasons for Visiting Exhibits

67% Check out what's new

55% Learn more

33% Just browsing

26% Get detailed info

Source: EVOLIO Marketing | 13,664 attendee survey respondents, B2B tradeshiows | April 2021- September 2023

ATTENDEE ACQUISITION CHALLENGES

Are attendees registering later?

49%

Registering more than 4 weeks out

29%

Registering less than 2 weeks out or onsite

[Center for Exhibition Industry Research - Attendee Acquisition Trends Driving Growth \(ceir.org\)](https://ceir.org)

ATTENDEE ACQUISITION OPPORTUNITIES

Is Bleasure a thing? **Yes.**

24%

of business travelers plan to take friends and family with them on at least one trip in 2024

>33%

of Gen Z and millennials will extend a trip for leisure

Source: Hilton's 2024 Trends Report

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ATTENDEE ACQUISITION STRATEGY

1. Who are our (and our exhibitors') specific targets?
2. What is our audience's reasons for attending?
3. What are attendees most interested in seeing and doing?
4. What are attendees most interested in learning about?
5. What challenges can our event help attendees solve?
6. Why should they attend my event versus others'?

**Your answers
create your
attendee
acquisition
KPIs/OKRs,
strategy,
communications
plans, messages,
and CTAs**

KPI: Key Performance Indicators

OKR: Objectives, Key Results

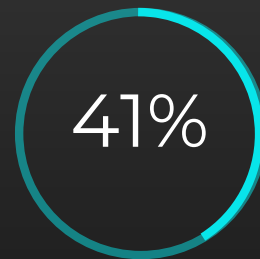
CTA: Call-to-Action

ADDRESSING EXHIBIT & SPONSORSHIP SALES CHALLENGES

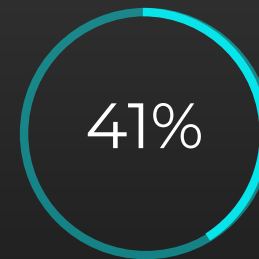
Compared with 2019

2023 Exhibit & Sponsorship Outlook

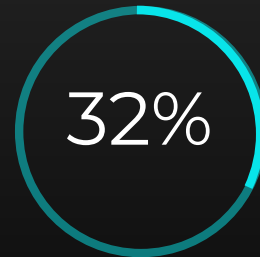
Source: EVOLIO Marketing & Lippman Connect April 2023 Survey | N=43 Large show organizers, >125K NSF



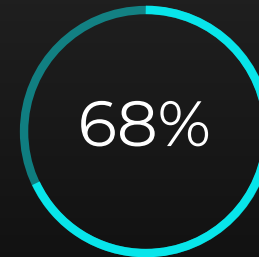
Increased # of exhibitors



Increased sponsor revenue



Increased # of sponsors



Increased cost per NSF



Exhibitors Need More Actionable Data

Honest, clean attendance numbers

Attendee profile details

Attendees' interests & challenges

Demand gen opportunities and outcomes

Connections a.k.a. Networking

Cost transparency

Tradeshow Sales Models are Shifting



Customized options

Exhibitors want more flexible sponsorship options and pricing tailored to their needs.



Transparency

Sponsors want clarity on what is included like media, promotion and support.



Connections

Brands want to connect with customers and prospects in many ways, beyond the booth

Exhibitors and sponsors are demanding more flexible and customized tradeshow packages that are backed by data.

Exhibitors Top Challenges

Sources: EVOLIO Marketing Event Outlook Survey n=77 | Explori Global Exhibit Leader Insights Study n=254

1. Cost Pressures

- Costs continue to rise
- Budgets are constrained and scrutinized

2. Event Experience

- Quality & quantity of attendees
- DEI, Sustainability & ESG (environmental, social and governance)

3. ROI, MQLs and SQLs

- 71% of exhibitors are happy with events as a marketing channel
- 67% satisfied with events as a sales channel*

4. Brand Impact

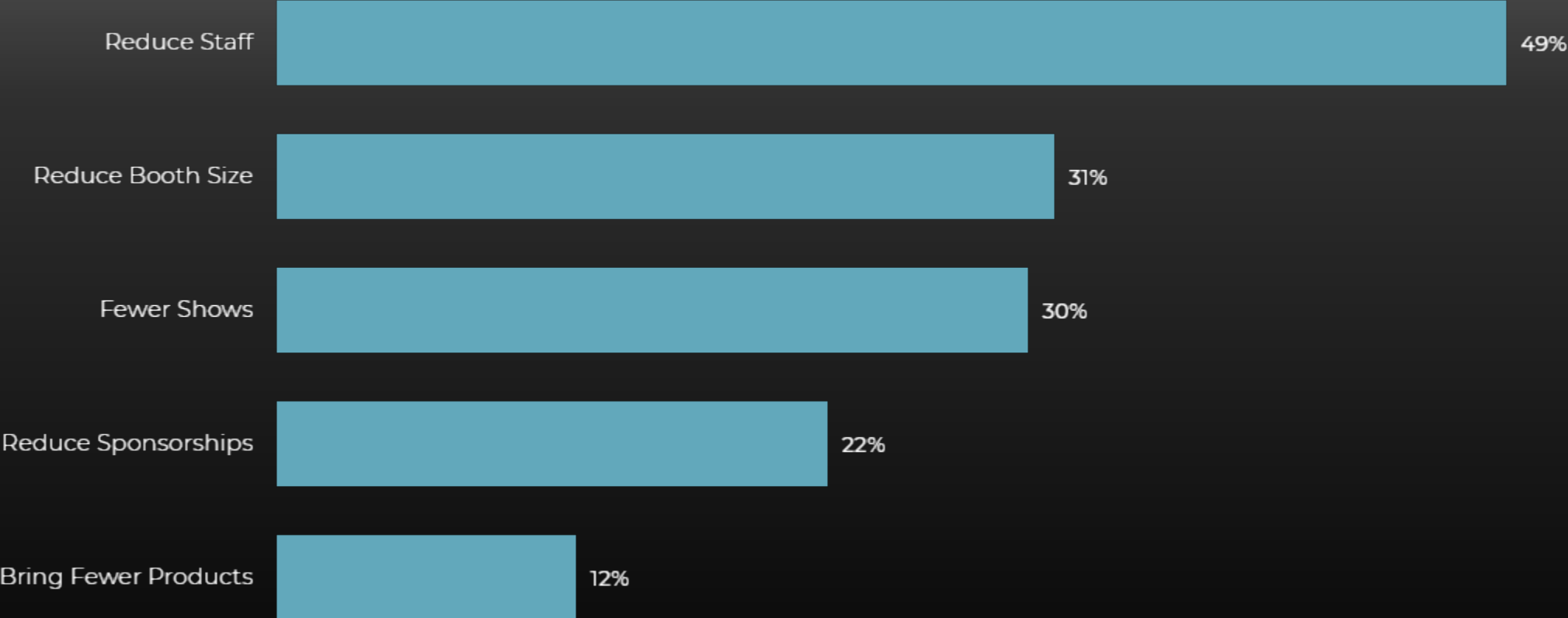
- Connections through event activities
- Beyond the booth

5. Event Portfolio Optimization

- Rightsizing budgets and events
- Shifting investments
- Own events vs tradeshow

How Exhibitors are Cutting Costs

Source: Explori Exhibit Leader Insights Study | January 2023 | n=254



SAMPLE SCENARIOS

Cost Avoidance

Help exhibitors calculate how *investing* in your show saves them money and time.

- Average cost of salesperson's meeting

$\$1,000 \times 50 \text{ meetings} = \$50,000$

- Loss of revenue from upset customer

Meet with unhappy customer(s), fix problem x average annual revenue from that customer(s)

- Average cost of executive's meeting

$\$3,500 \times 10 \text{ meetings} = \$35,000$

- Value of new contacts (SQLs/MQLs)

Obtain 500 targeted, qualified contacts instead of buying a bad list

2022 Material & Labor Rate Report

Compares average labor and material handling rates across 16 major U.S. convention cities.



29% increase in display, labor, and material handling rates since 2017

Electrical labor has the greatest increase at 32% compared with installation & dismantle labor (26%) and material handling (28%).

Rates far outpace increases in prices compared with most other business services.



"To adapt, tradeshow organizers must offer more actionable data and metrics and consider evolving promotional opportunities to help brands achieve greater outcomes."

Joe Federbush, EVOLIO Marketing

Metrics that Matter to Exhibitors/Sponsors

Operational

visitor activity

demos

interactions

Aspirational

values

brand sentiment &
perception

social good

Actionable

outcomes

leads and
demand gen

relationships



CASE STUDY:

ATTENDEE SEGMENTATION FOR ACQUISITION STRATEGY & MARKETING

Case Study: Attendee Segmentation Analysis

2022 In-person Conference: Registration vs Attendance (EXAMPLE)

Total Audience Breakdown	Registered		Attended		Difference	
	#	%	#	%	Difference #	Difference %
Attendee: Academia (free)	211	11%	115	9%	-96	-45%
Attendee (mix of guests/free and paid)	952	51%	602	45%	-350	-37%
Media/Analyst (free)	90	5%	68	5%	-22	-24%
Speaker (free)	103	6%	80	6%	-23	-22%
Sponsor/Exhibitor (paid)	502	27%	461	35%	-41	-8%
Total	1858		1326		-532	-29%

Total Audience Job Roles	Registered		Attended		Difference	
	#	%	#	%	Difference #	Difference %
Business Execs (CEO, CFO, COO, CSO, CMO, President, VPs)	567	31%	448	35%	-119	-21%
Technology Decision-makers (CTO, CIO, CISO, Engineering Manager, ITDM)	355	20%	262	20%	-93	-26%
Software Developers (Programmer, Integrator, Data Scientist)	331	18%	184	14%	-147	-44%
Hardware Developers (Designer, Engineer, Architect)	224	12%	170	13%	-54	-24%
Academic (Educator, Researcher, Student)	147	8%	88	7%	-59	-40%
Media/Analyst	88	5%	67	5%	-21	-24%
Other (Government, Self-Employed)	104	6%	75	6%	-29	-28%
Total	1816		1294		-522	-29%

Case Study: Attendee Segmentation Analysis

Develop an attendee acquisition strategy and marketing approach based on understanding attendees' objectives and how they differ by key audience segments; Develop targeted messages.

Attendee Survey Results by Segments (EXAMPLE)

Reasons for Attending		All Respondents	IT Decision-makers	Software Developers	Hardware Developers
HIGH PRIORITY	To learn about current technologies	76%	81%	75%	72%
	To learn more about the industry roadmap	67%	88%	61%	51%
	To connect/network with peers and industry experts	66%	76%	60%	61%
MIDDLE PRIORITY	To learn about developer solutions	59%	40%	72%	66%
	To connect with other developers and tech professionals	52%	55%	50%	51%
	To collaborate with the technology ecosystem	40%	49%	41%	31%
LOW PRIORITY	To advance my career	38%	27%	47%	41%
	Get access to Developer Toolkits and SDKs	32%	20%	33%	44%
	To start new business opportunities	17%	12%	26%	12%

Case Study: Attendee Segmentation Analysis

- 1. Attendee targets:** Lack of personalization in event promotion
- 2. Attendee no-shows:** Lack of communications after registration; no calendaring
- 3. Content and education:** Effective based on developing tracks based on attendee-types and interests
- 4. Event outcomes:** Event NPS=+57; 88% extremely/very high satisfaction; 76% highly likely to attend again
- 5. Sponsors/Exhibitors:** Low satisfaction; low number of leads



Resources

Additional Resources and News

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marketing

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EVOLIO & Lippman Connects Roundtable Resource Center

Thank you for visiting! Please download any of the recent presentations and studies prepared by EVOLIO Marketing and Lippman Connects by clicking on the images below.

If you're interested in having EVOLIO Marketing conduct your attendee and exhibitor surveys for your next event, [contact us](#).

To find out more about Lippman Connects, please visit their [website](#).

Exhibit Sales Roundtable Research



Download ESR Study: Sept '23

Attendee Acquisition Roundtable Research



Download AAR Study: July '23

Large Show & Midsize Show Roundtable Research



Download LSR Insights: April '23

Industry Data, Insights, and the Word on the Street



Download ESR Study: June '23

Attendee Acquisition Outlook & Challenges



Download AAR Study: March '23

Midsize Show Attendee Acquisition & Exhibit/Sponsorship Sales



Download MSR Insights: Nov '22

Exhibit and Sponsorship Sales Challenges



Download ESR Study: Feb '23

Attendee Acquisition Challenges & Outlook

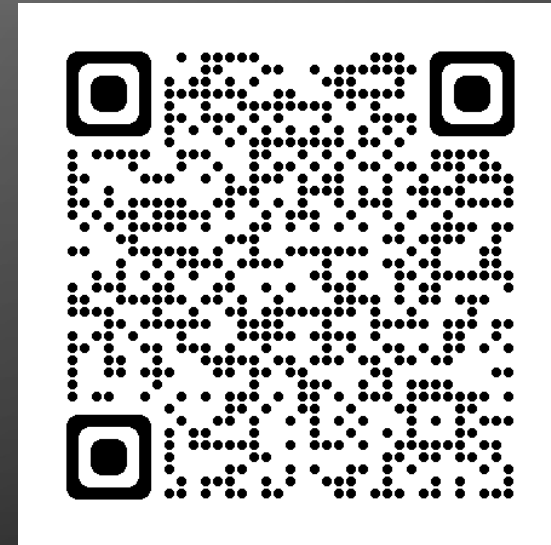


Download AAR Study: Oct '22

Large Show Roundtable



Download LSR Insights: Nov '22



WHAT MAKES AN EFFECTIVE ATTENDEE ACQUISITION CAMPAIGN?

\$49

ceir

ATTENDEE ACQUISITION TRENDS DRIVING GROWTH

REPORT ONE:
Planning, Performance Metrics, Costs, Gross Revenues and Outcomes

REPORT ONE:
Planning, Performance Metrics, Costs, Gross Revenues and Outcomes

REPORT TWO:
Marketing Channel Mix Messaging and Other Tactics that Drive Recovery

REPORT THREE:
Areas of Focus for Improvement for Future Attendee Acquisition Efforts



[Center for Exhibition Industry Research - Attendee Acquisition Trends Driving Growth \(ceir.org\)](https://ceir.org)

WHAT MAKES AN EFFECTIVE ATTENDEE ACQUISITION CAMPAIGN?



- 1. Focus messaging on key themes and personalization**
power of F2F, addressing urgent needs, personalized
- 2. Multichannel marketing is a must**
hyper-focused, connected, interactive
- 3. Collaborations and relationship selling**
exhibitor invites, key buyers, multi-staff, localization
- 4. Strategically use discounts and premiums**
deadlines, VIP programs, make it easy

[Center for Exhibition Industry Research - Attendee Acquisition Trends Driving Growth \(ceir.org\)](https://ceir.org)

Additional Resources and News

Freeman

Event Services Case Studies Resources About Contact Us

Research

Freeman Trends Report Q1 2023

Attendee demographics and attendance levels for Gen Z and millennials

[View Resource](#)

Event Planners, Meet Your New Generation of Event Goers

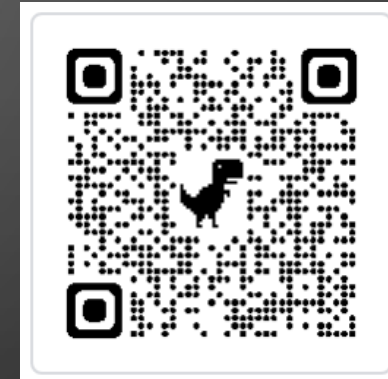
The industry has changed for **event planners**. And with new research data available, we have a better understanding of *why*. These changes have a lot to do with the changing demographics of **event goers** — they're continuing to get younger.

So let's dive in and meet your **Next Gen Event Goers** (think Gen Z + millennials) and get to know what's motivating them to attend (or not attend) events and *why*. Get to know their values, expectations, and how these are different from previous generations. You'll be able to translate this next-gen information into planning next-level engagements worthy of all attendees.

So what exactly are the next generation's expectations?

Find these insights and more right here in the **Q1 2023 Freeman Trends Summary Report on Event Attendee Intent and Behavior**.

3 key takeaways rated G for general audiences (of all ages)



Additional Resources and News



Global Activities

In-person Meetings Roaring Back in 2023!

In-person meetings and events came back in 2022 faster and at a higher level than predicted. Our survey respondents believe they will continue to outpace expectations in 2023.

Sustainability remains a priority

Four in five respondents (80%) say their organization takes sustainability into account when planning meetings and events.

Of these organizations, over ¾ of them have a defined sustainable meeting program strategy in place.

76% Sustainable meeting program strategy

Attendee numbers are going up

Meeting types with the largest anticipated increase in attendees:

1. Internal team meeting/training
2. Product launch
3. Small/simple meetings

Meeting spend is rising

Companies expect to invest more in M&E

65% say meeting spend is increasing

10% see increases of more than 11%

35% say meeting spend is staying the same or decreasing

There will be more space

Meeting professionals expect more guest rooms and meeting spaces to be available in the next two years.

Percentage of respondents predicting increases in:

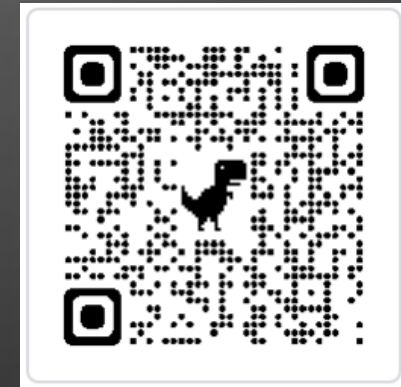
	2023	2024
Hotel rooms	45%	59%
Meeting space	49%	58%

And the cost per attendee will increase

"Average rates continue to rise due to higher labor, food, and other fixed costs, along with the impact of inflation – we believe that trend will continue with high demand."

– Jonathan Kaplan
VP, Global Sales Strategy, IHG

Source: North American, European, Latin American, and Asian Pacific Surveys and Interviews from American Express Meetings & Events, 2022.




Additional Resources and News

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News Properties Leasing Sales Funds Tenants Professionals Markets Public Record Marketing Center Benchmark

Hilton Outlines Generational Travel Trends

Hotel Guests Expected To Prioritize Sleep, Connectivity

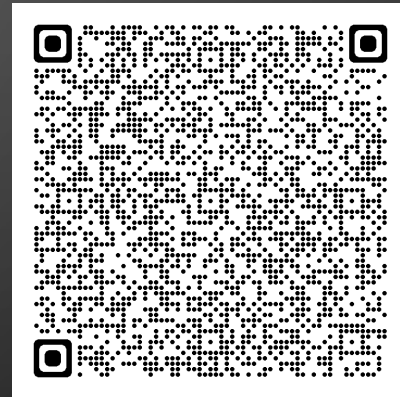


Hilton's 2024 Trends Report highlights the top priorities among different generations of travelers. (Hilton)

By Sean McCracken
Hotel News Now
October 5, 2023 | 9:17 AM

The idea that the main product hotels sell is sleep isn't new, but [Hilton's 2024 Trends Report](#) claims that will be more true than ever next year.

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Thank you!

Joe Federbush

President & Chief Strategist

Joe.Federbush@evoliomarketing.com