

Digital Playbook

A concise guide to
digital insights in action

Are you making **the right calls?**



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We hope that the **Digital Playbook** gives you some new ideas, broadens your perspective and gives you some data that you can apply right now.



Framing the Social and Digital Debate

The debate among Brand Marketers and exhibition executives about the value of social media and digital marketing is fierce. New social platforms appear with startling frequency. Standards and benchmarks are only now emerging. And in the words of one senior marketer interviewed for the research, “My CEO is telling us we’re not moving fast enough.”

That’s why a special cross-industry group came together to create the Digital Playbook. This research report represents the opinions and activities of the major stakeholders in trade shows and conferences: Brand Marketers architecting trade show portfolios, as well as Organizers, including independent show producers and association event executives who create business and consumer events.

By looking at and comparing the data from these different groups, we aim to triangulate how the industry can better use social media and digital marketing to achieve greater ROI.

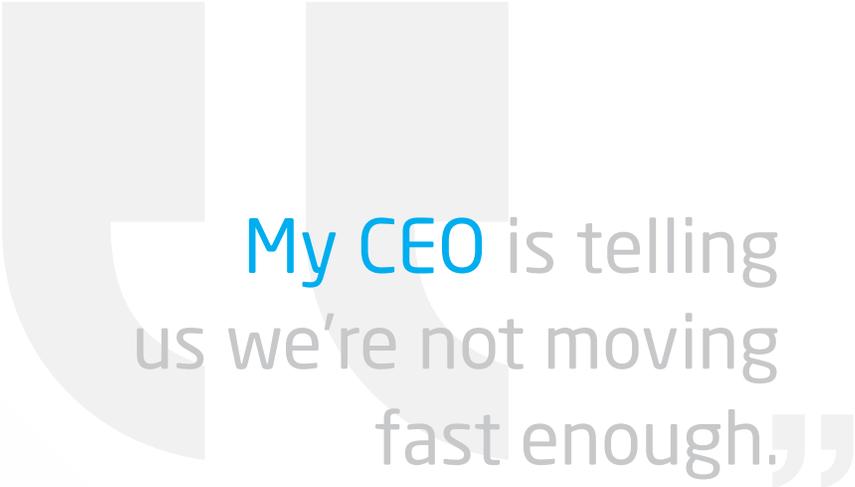
To do that, we’ve organized the Digital Playbook around the three major goals common to the industry:

- Revenue generation,
- attendee engagement
- and cost containment.

This report will provide hard-hitting, useful insights.

Something to keep in mind as you read this research and pass it around: We’re serious about the “Playbook” part; we’ve tried hard not to just diagnose the current state of things but to offer up different “plays” – strategy-tactic alignment, resources etc. – that you might consider when evaluating any social and digital activity. It’s concise and to the point; we’ve stayed away from creating something too big to fully understand or apply in a meaningful, efficient way.

We hope that the Digital Playbook gives you some new ideas, broadens your perspective and gives you some data that you can apply right now. We’ll be happy even if it only reinforces that you’re on the right track right now; debate is good and healthy as long as it is well-informed. The Digital Playbook is an effort to do just that.



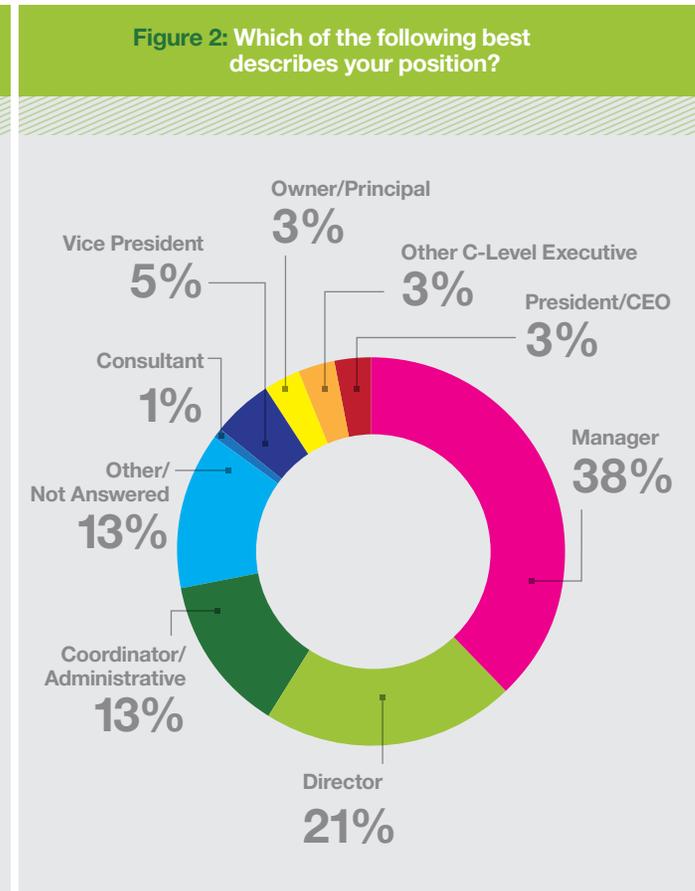
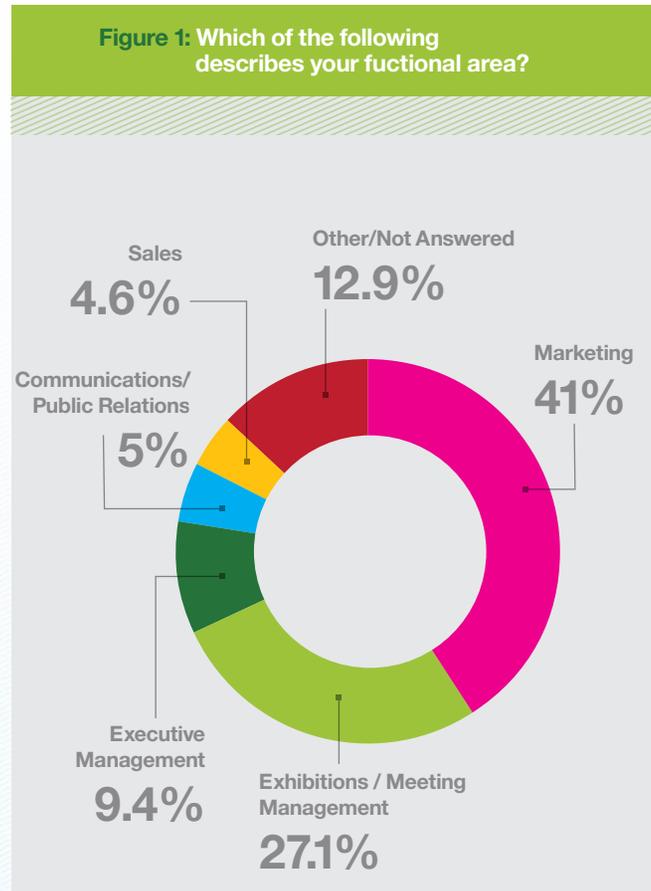
My CEO is telling
us we’re not moving
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Methodology

A unique collaboration among the Center for Exhibition Industry Research (CEIR), George P. Johnson Experience Marketing, INXPO, the American Society of Association Executives, the International Association of Exhibitions and Events and EXHIBITOR magazine, the Digital Playbook is based on an online survey of 480 exhibition and sponsorship decision-makers, including senior corporate Brand Marketers, independent show producers and association event executives.

The online survey was conducted in June 2013; titles skew upward and include directors, vice presidents, chief executive officers, chief marketing officers and similar titles. A full 85% of respondents have manager titles or above. Respondents are primarily from the United States.

Most respondents (95%) report that their organizations are using digital tactics today, while five percent still have not jumped onto the digital bandwagon. This report is based on activities and perceptions of organizations using digital media tactics today in tandem with the exhibitions they organize or participate in as exhibitors.



Definitions

Defining Digital

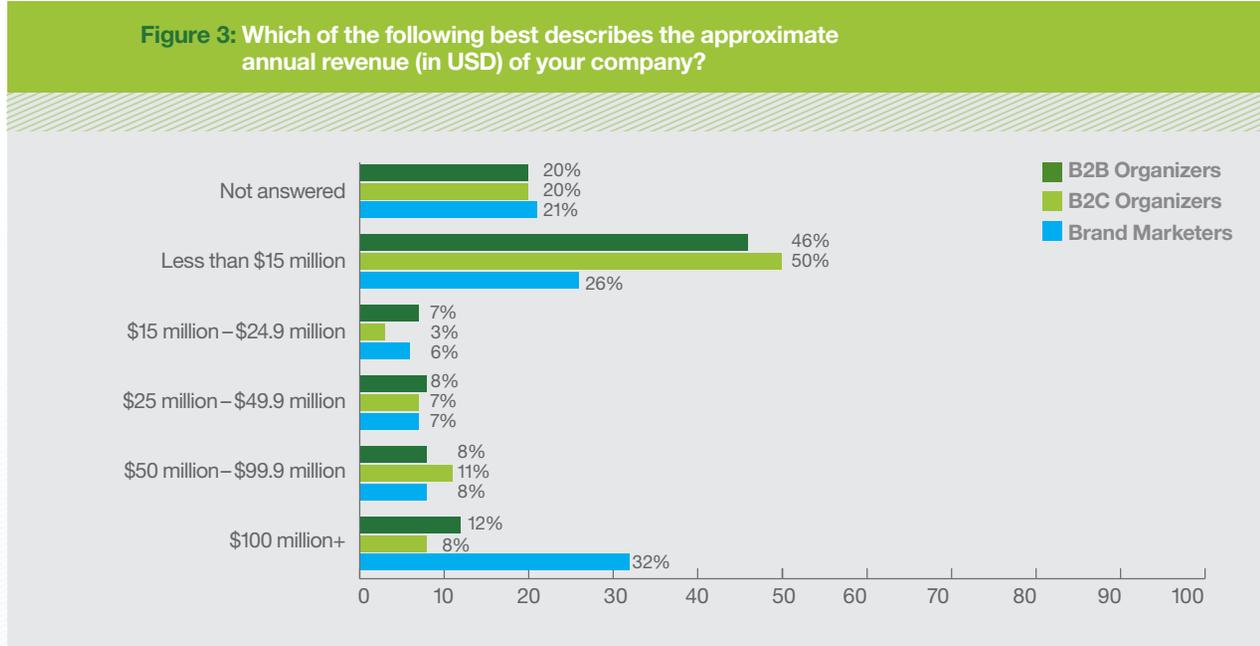
To give this research a solid framework, we have purposefully taken a narrow definition of the broad “digital marketing” world, focusing on the activities most commonly used by producers and corporate Brand Marketers.

Communication

- Digital content and media: streaming and downloads
- SEM advertising: banner and text
- Microsites and similar “pop-up” event-branded websites
- Content sharing: Slideshare, iTunesU, YouTube
- Email: both email marketing and updates/advisory
- Twitter (or similar) as backchannel during presentation

Participation

- Online/mobile gaming and sweepstakes
- Mobile-specific applications such as attendee networking/notification
- “Virtual/Hybrid” events and content distribution (“remote” education, networking, etc.)
- Physical interactive touchscreens, interactive environments
- Augmented reality, enhanced reality



Propagation

- Tablet-guided discussion – animations, imagery, diagrams
- NFC, RFID – lead capture, measurement, gamification
- QR Codes – more info, check-in’s credential exchange
- Blogs and similar one-to-many publishing platforms
- Twitter, Facebook and other one-to-one engagement platforms
- #Hashtags
- RSS and other content syndication

Top Findings

Creating a Game Plan



In line with attendee expectations for digital

48% Brand Marketers
44% B2C Organizers
48% B2B Organizers



72%

of all respondents forecast an increase in their digital spend

68% currently have a digital strategy



Shrinking role of direct mail

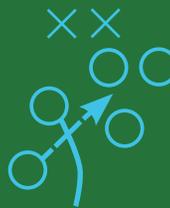
56%

of respondents are moving from traditional to digital tactics



Winning Plays

21% Brand Marketers
18% B2C Organizers
13% B2B Organizers



Rely on internal experts for their digital strategy

51%

of B2B organizers have at least one digital tactic in all exhibitions – most common is email marketing

For **86%** of users, microsites met or exceeded expectations for cost savings

The Impact of Digital on Attendee Engagement

83%

See the Value

70%

of all users customize their digital tactics to reach different segments of their audience

Roughly **40%** keep conversations going all year



Building a Dynasty

Revenue attributable to digital marketing activities is on the move.



Only five percent report \$0 in digitally derived revenues. The median of total revenue attributed to digital marketing is 15% across all respondents, and its predicted to increase in the next few years.

2014: Mobile and Social



67% of all polled expect to be doing more in the next few years

Other Exciting Tech:

- Augmented Reality
- Near Field Communication
- Second Screen
- RFID



Both B2B and B2C organizers as well as brand marketers expect to be spending the same or more across all digital marketing tactics

1. Revenue

The Digital & Revenue Connection

Marketing ultimately aims to drive revenue. Never shy to embrace the latest technology to bolster sales efforts, the exhibition industry is adopting social and digital marketing to meet that objective. In fact, over 56% of respondents are moving from traditional tactics to digital tactics. Among those making changes, no traditional tactic has felt this more than print – direct mail was the highest tactic to be reduced (36%) or eliminated (26%) in favor of digital tactics.

It seems to be working. Roughly half say that social and digital marketing are valuable or highly valuable for driving revenue (Fig 4). While 33% of all respondents attributed 10% or less of total revenue to digital tactics, one out of 10 respondents indicate 26-50% total revenue attributed to digital.

These findings, coupled with an estimated 69% of all polled anticipating revenue from digital tactics to increase over the next several years (Fig. 5), suggest that social media and digital are paying off.



Cheat Sheet



Brand Marketers are interested in qualified leads and quality of attendees over raw attendance numbers (ROI is ultimately measured in leads; all other measurements are secondary). The top two measurements for Organizers are overall attendance to the event and unique visitors to the event website.

89% of all polled indicate they measure the ROI of digital activities, most often doing so post-event at a rate of **94%**. Additionally, **62%** of B2B Organizers measure post-event.

While **33%** of all respondents attributed **10%** or less total revenue to digital tactics, there is a noticeable bump estimating **26–50%** total revenue attributed to digital – more than one out of 10 of all polled.

Email marketing is still highly valuable, with **72%** of all respondents considering it a top tactic for revenue generation. In-booth lead capture comes in second at **40%**.

40% of B2C show producers rank social media as one of the top three most effective digital tactics for generating revenue; **32%** of Brand Marketers and **27%** of B2B Organizers feel the same way.

1. Revenue (continued)

Figure 4: In terms of revenue, how do you see the results from digital activities as they relate to value created for the organization?

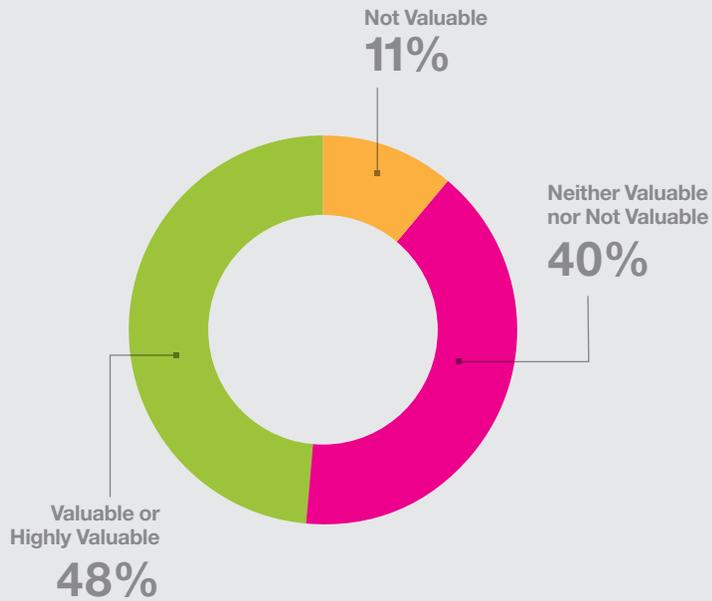
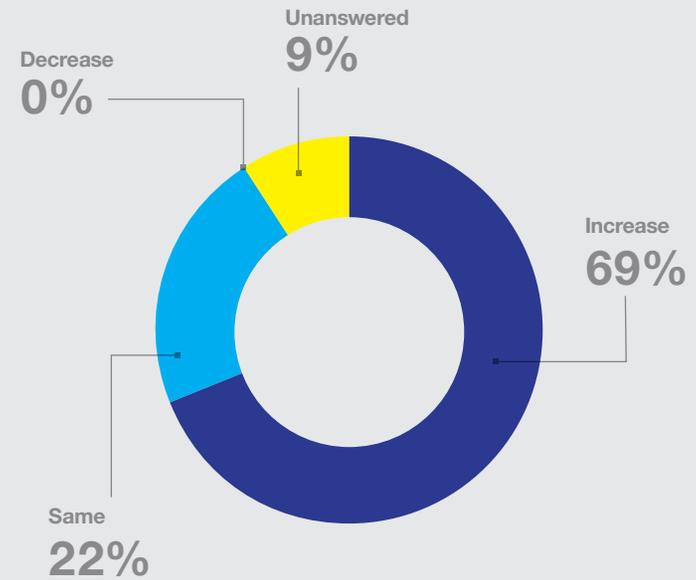


Figure 5: Do you anticipate revenues generated from digital aspects of exhibitions to increase, decrease or remain the same?



1. Revenue (continued)

A Strategy & Revenue Corollary

Over two-thirds (68%) of respondents say their organization currently has a digital strategy, with 29% indicating they do not have one in place; however, 21% from the latter group plan to define one within six months to a year. What we are seeing is an industry-wide push to have at least a basic plan in place. Only eight percent of those with no digital strategy have no plans to implement one.

The reason for the strategy push? Respondents tell us that social media and digital marketing work for revenue generation.

Those with a strategy in place are more likely to attribute a larger slice of revenue to their digital tactics, and conversely, nearly half of those without strategy or plans to implement in the next six months attribute 10% or less total revenue to digital tactics. What's more, those with a strategy are also more likely to supplement more established tactics such as email marketing with new technology such as mobile apps, webcasts/webinars and content sharing, at near double the rate of those without a strategy.

It would seem that strategy is viewed as a solid foundation for improving the ROI of social media and digital marketing, as well as experimentation with new tactics.

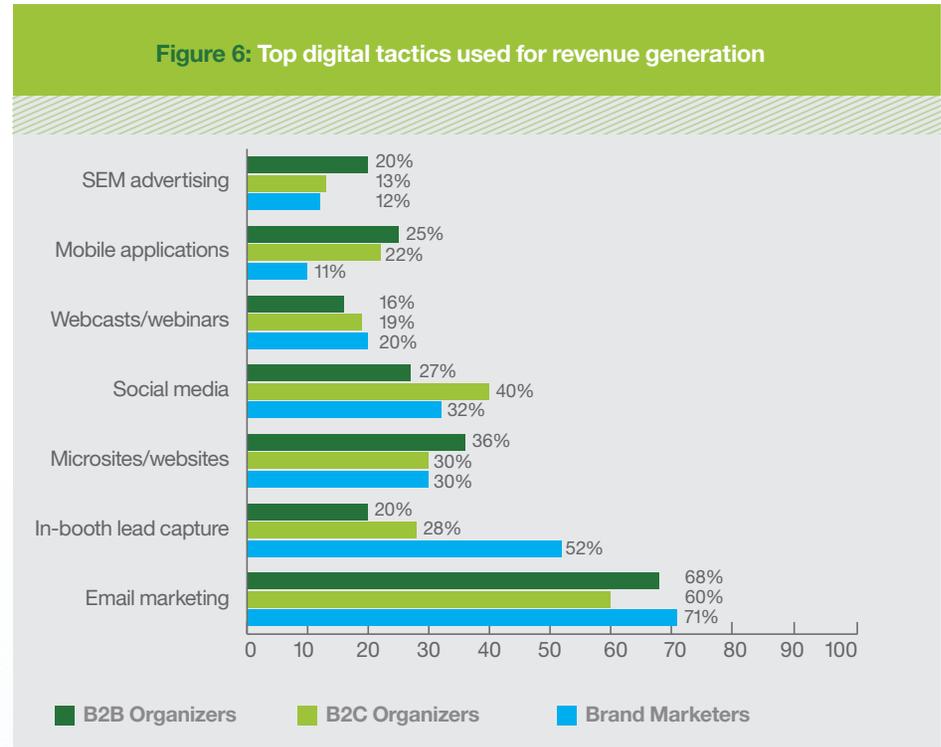
Email Marketing Evolves

Email marketing continues to be a cornerstone of most digital efforts in the exhibition space. When asked to rank the top three digital tactics for revenue generation, email marketing was consistently included, with 71% of Brand Marketers, 68% of B2B Organizers, 60% of B2C Organizers and 60% of B2C Organizers prioritizing the tactic (Fig. 6).

When we dug deeper into the data, some interesting relationships cropped up. When asked to name the #1 tactic for revenue generation, nearly a third (31%) of Brand Marketers ranked email first, leaving 69% who gave higher priority to another tactic: 26% ranked in-booth lead capture as the most important for revenue generation, followed by 9% ranking microsities and websites as the most important to revenue.

The same trend emerges among Organizers - 43% of B2B and 35% of B2C ranked email marketing

Figure 6: Top digital tactics used for revenue generation



the #1 tactic for revenue generation. While not used at quite the rate of Brand Marketers, in-booth lead capture and microsities/websites were also important vehicles of revenue generation for Organizers.

Clearly, email is a powerful tool for the exhibition industry. With that comes the need to be able to handle customer data at the individual level more effectively and integrate with other social media, digital marketing and technology systems. From marketing automation to sales fulfillment, data management is now a core skill set.

1. Revenue (continued)

What Is Measured... and When

Just about nine out of 10 respondents (89%) say their organizations measure the ROI of their digital activities. Among organizations that do, not surprisingly, 95% of Brand Marketers determine the ROI on these engagements post-event. The real story is that nearly half - 47% - also monitor ROI of digital activities taking place *during* an event. Technology is increasing the speed at which brands can interact and respond.

It's also apparent that Organizers clearly prioritize attendance numbers when talking about ROI of digital tactics, with around 60% using overall event attendance to judge the ROI of digital tactics. One interesting stat is that fewer judge digital ROI through the lens of sponsor or partner feedback - 40% of B2B and 35% of B2C Organizers (Fig.7).

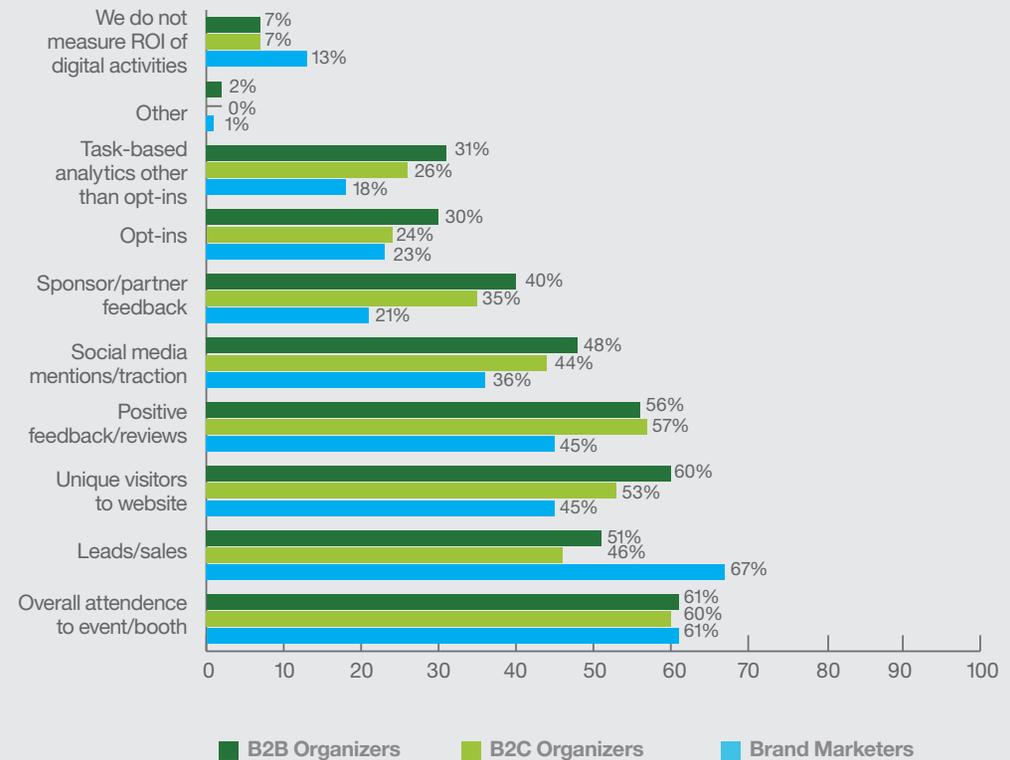
The importance of pre-event engagement through social media and digital marketing explain the 62% of B2B Organizers who measure ROI leading up to an event (only 41% of

Brand Marketers do this) (Fig.8). This ties in directly with their systems of measurement - 60% of B2B Organizers measured ROI through unique visitors to their website. By monitoring their web presence, social media mentions or traction, recording positive feedback and reviews, and triaging potential issues, Organizers can help ensure successful, sold-out exhibitions year over year.

Though 95% of B2B Organizers who monitor ROI agree that post-event is a crucial time to measure the ROI of digital activities, they of course get much of their return via sales prior to the event (followed by the all-important re-book) (Fig.8). So for this group, increased sophistication in social and digital marketing in support of sales efforts is key to success.

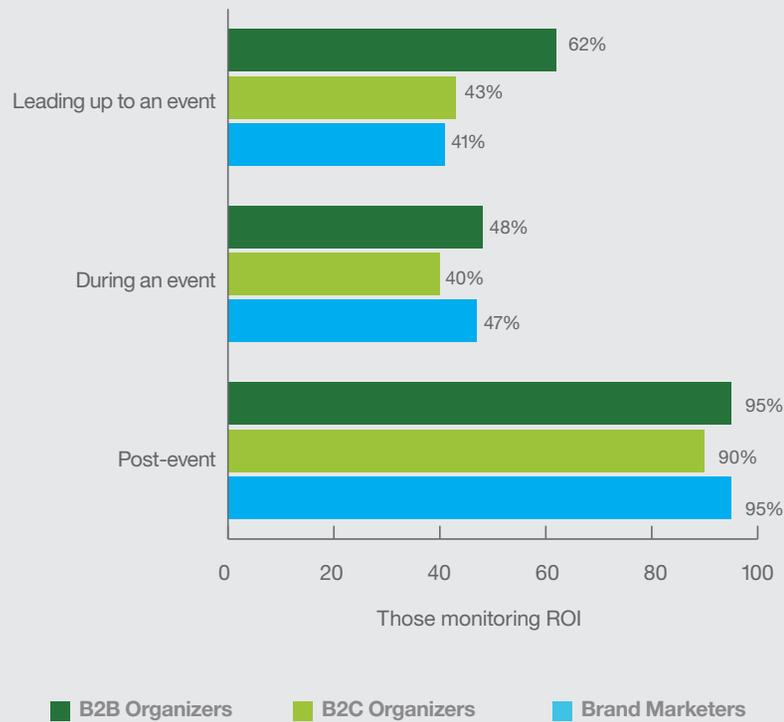
Brand Marketers also measure digital tactics post-event, prioritizing leads/sales and overall attendance to the event/booth.

Figure 7: How do you measure ROI of your digital tactics?



1. Revenue (continued)

Figure 8: If you measure ROI of your digital activities, when do you do so?



Recommendations

- Executing social and digital marketing tactics without a cohesive strategy (with clear goals, insights and success metrics) leaves money on the table.
- Email still ranks as a powerful tool, but not all email campaigns are created equal; optimize email for better results.
- Analyze and segment your target audience as much as possible in order to personalize communications across multiple channels.
- Invest in more sophisticated information capture and marketing automation to create a campaign approach underpinned by rich data and insights.
- Measuring post-event “for next time” isn’t enough; create a measurement system that tracks throughout and allows you to make changes in real time.
- Now is the time to explore mobile solutions for lead and audience acquisition and management.

2. Attendee Engagement

Engagement: First, a Definition

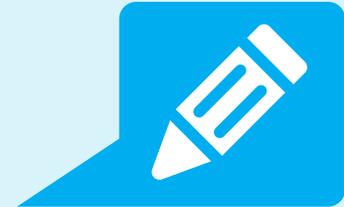
For the purposes of this research, we've defined engagement as the measure of an organization's ability to create a brand community and galvanize it to action in ways that go beyond one-time transactions: engagement is about creating multiple, ever-deeper interactions that occur over multiple channels and tactics.

Reach Out and Touch (Your Customer)

The data show that all respondents generally agree that social media and digital marketing are important to attendee engagement (Fig. 9).

The industry has embraced the importance of measuring the success of their digital tactics aimed at engaging their target audiences, with roughly eight out of 10 respondents overall identifying one or more methods used to measure success.

In terms of how the industry is measuring engagement via digital tactics, Brand Marketers consider leads the strongest indication of engagement while both B2C and B2B Organizers prize overall attendance as the foremost indicator (Fig 10). Interestingly, Brand Marketers ranked attendance second, implying they measure digital's ability to engage first by the number of qualified leads, and then by the total volume of interactions in the booth.



Cheat Sheet

88% of respondents who use digital tactics in 100% of their exhibitions consider them valuable or highly valuable for attendee engagement.

55% of respondents feel it is important to connect with attendees throughout the event lifecycle, with 41% finding it important to do so throughout the year.

More than 70% of all respondents customize their digital offerings to target different segments of their audience, enabling personalized engagement.

50% of Brand Marketers determine how successful digital tactics were in driving engagement through leads/sales. This is a secondary measurement for Organizers, who consider overall attendance as the foremost indicator of engagement.

The majority of respondents find that the best opportunity to act on information gleaned from digital activities is in real time, either manually by staff (52%) or via automation (18%), demonstrating that you are responsive to their needs and desires.

2. Attendee Engagement (continued)

Figure 9: Percentage of respondents rating digital tactics valuable for attendee engagement

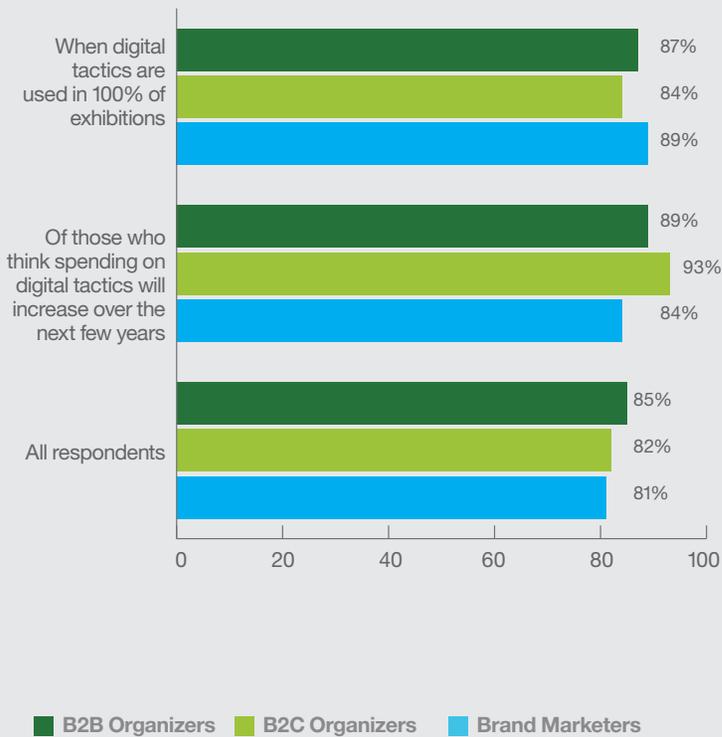
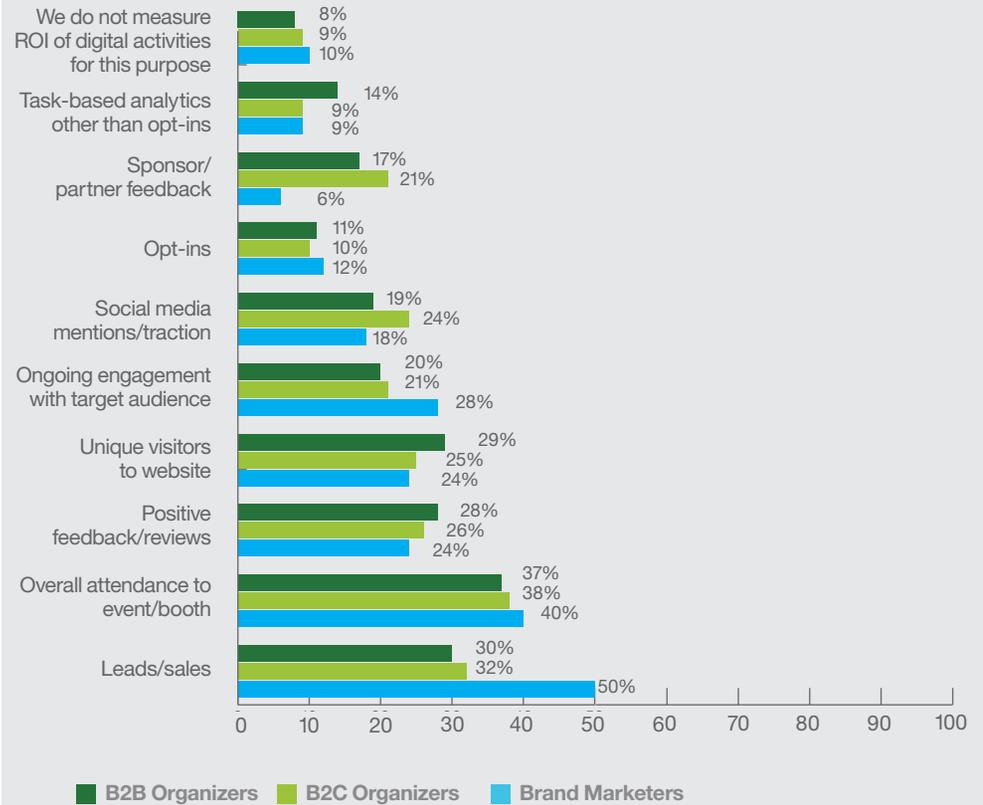


Figure 10: How do you measure success in using digital to enhance customer/attendee engagement?



2. Attendee Engagement (continued)

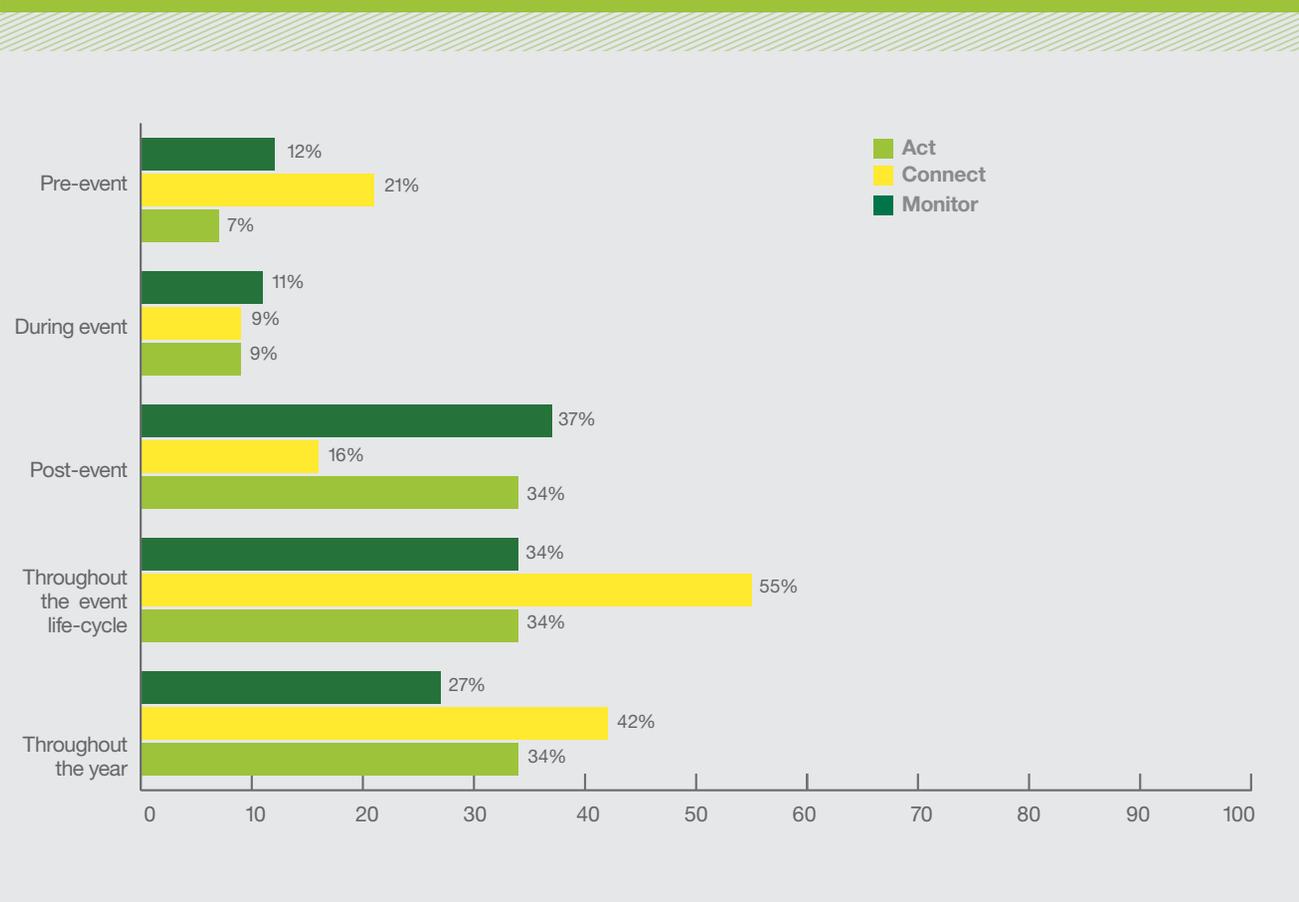
Timing Attendee Engagement

Determining when to activate and drive engagement is just as important as the manner in which it is done. Within the event lifecycle and throughout the year, best practices are starting to emerge around the ideal times to monitor audience behavior, connect with the attendee and act on insight gathered to increase engagement.

Understanding your audience through monitoring is the first step to generating engagement. Roughly a quarter of Organizers and Brand Marketers are monitoring audience behavior throughout the year (Figs. 11a, 11b, 11c), by evaluating channels such as websites, microsites, email metrics and social media outlets, as well as tracking outcomes onsite at an exhibition in terms of overall attendance, lead generation, and more (Fig. 10).

That activity spikes post-event, with 71% of all respondents, including those who monitor post-event only as well as those who monitor throughout the event lifecycle, intensely scrutinizing the flood of data from social and digital channels.

Figure 11a: Brand Marketers: When to monitor, connect and act to promote attendee engagement



2. Attendee Engagement (continued)

Figure 11b: B2B Organizers: When to monitor, connect and act to promote attendee engagement

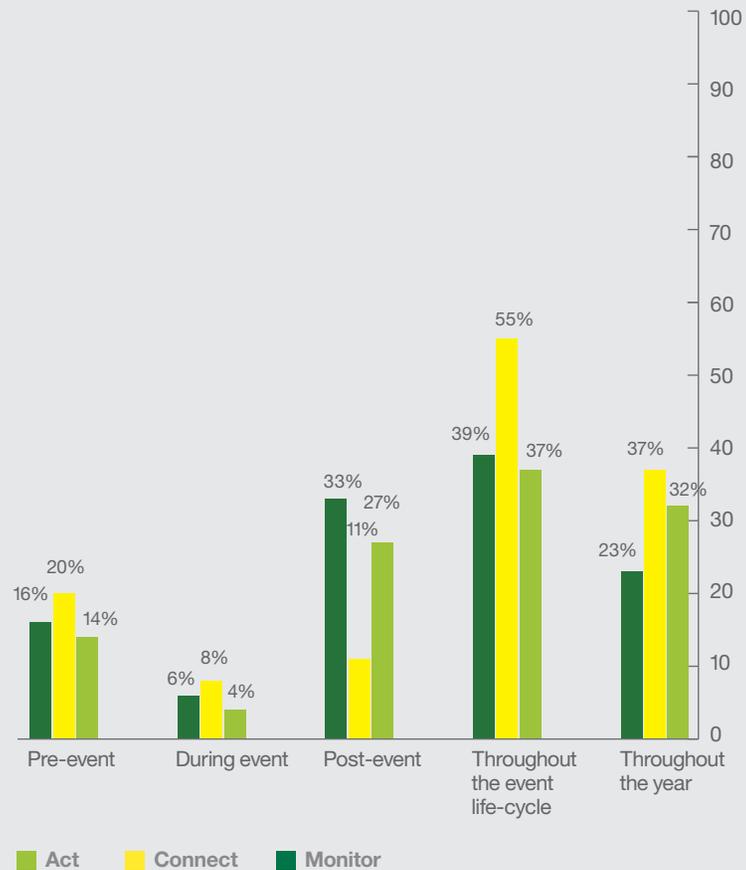
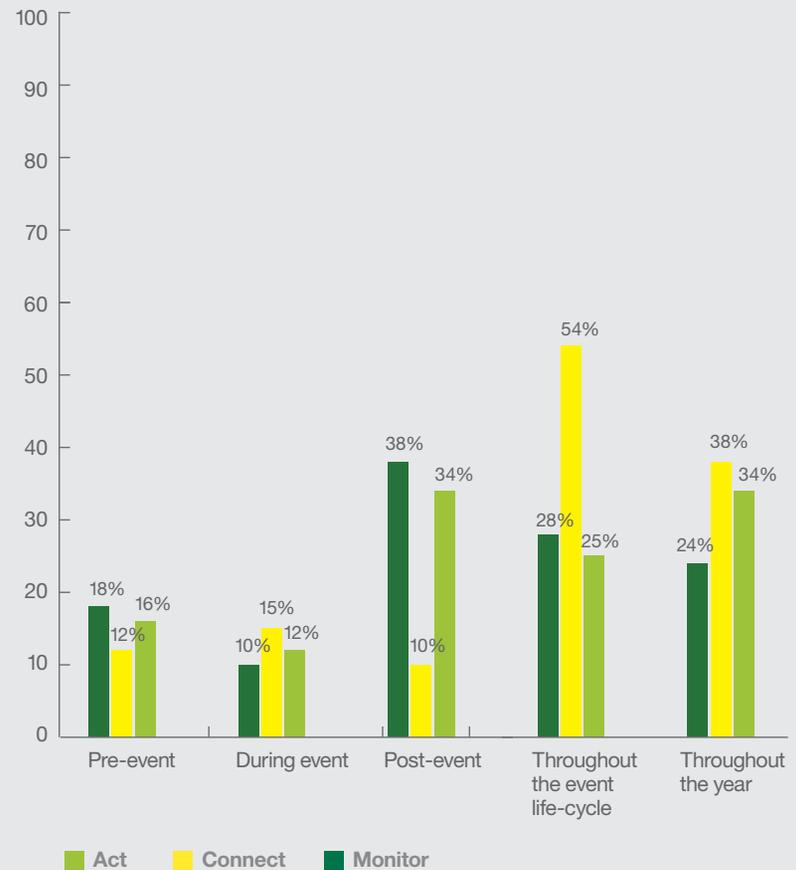


Figure 11c: B2C Organizers: When to monitor, connect and act to promote attendee engagement



2. Attendee Engagement (continued)

Timing Attendee Engagement

Over half the Organizers and Brand Marketers find it valuable to extend the connection with their audience throughout the event lifecycle, pre-, during and post-event. But many are finding that this is not going far enough - 41% of all respondents say it's important to keep conversations going throughout the entire year. (Figs. 11a, 11b, 11c).

Converting attendees to leads and leads to customers is not just the fortunate confluence of a great show experience and a productive conversation with a brand representative - it is the product of an ongoing conversation enabled by social and digital technologies and supported by data that allows brands to have a more relevant, personalized discussion onsite and year-round.

From the perspective of B2B and B2C Organizers, when it comes to engagement, list-buying and partnerships with media and publishers still have their place. But, with roughly two-thirds or more of B2B and B2C Organizers expecting to be doing more of it in the next few years, clearly social and digital media have a role to play in that communications stream.



Recommendations

- An annual content marketing plan powered by social and digital technologies is preferable to a once-a-year communications and sales strategy – ongoing conversation supported by analytics drives personalized discussions, turning leads into customers.
- View the event as the trigger for leads/sales, audience acquisition and sponsorship sales – part of an ongoing continuum.
- Ask yourself, “What kind of value should I be creating for my audience year-round that makes the event the natural next step in their buying process?”
- Engagement is most often the product of great content, so customize content streams to align to your different audience segments (don't forget to test).
- Investigate your target audience's technographics to determine what technology they are using and their content consumption habits.
- Social media continues to be an important way to measure and drive attendee engagement in the digital space, creating a community around your brand and making it easier to continue the conversation throughout the year, and steadily increase engagement.

What kind of value should I be creating for my audience?

3. Cost Containment

The Truth About Cost Savings

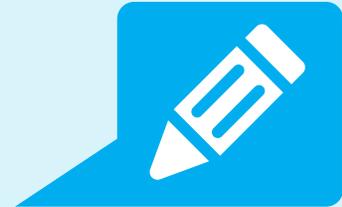
One original selling point of social media and digital marketing was the potential for cost savings. In some cases there is a lot of truth to that claim. But now that digital marketing has matured somewhat, do these assumptions still hold true?

Even though 53% of all respondents believe that social media and digital marketing are valuable or highly valuable in driving cost containment, at the level of specific tactical execution the data are mixed.

Here is one example, using mobile as a lens: 59% of B2B Organizers use mobile applications, and 19% are doing so primarily for cost savings. But nearly 32% of the B2B Organizers using this tactic for cost savings indicate that mobile has fallen short of expectations. It would appear that while B2B Organizers continue to experiment with applications to achieve any number of objectives so far, cost savings has not been a primary benefit. Only eight percent of Brand Marketers and 12% of B2C Organizers use mobile to save on costs.

Still, no matter where you fall in the industry, interest in mobile is high; 67% of all respondents anticipate spending more on mobile, tied with social media for the highest anticipated future spend on digital tactics.

Overall, the most-used digital tactics for cost savings are email (71%), social media (41%), microsites/websites (24%) and webcasts/webinars (18%) (Fig. 11). But when users were asked whether each tactic met or exceeded expectations, the top three ranked were microsites/websites (86%), virtual/hybrid events (84%) and email marketing (81%) (Fig. 13a). Respondents are thinking strategically about when to employ virtual/hybrid events, which are used at a significantly lower rate, but with great success at containing costs.



Cheat Sheet

53% of all respondents believe that digital tactics are valuable or highly valuable in driving cost containment, with 93% of all respondents identifying one or more tactics used for this purpose.

The most popular tactics used for this purpose include: email (71%), social media (41%), microsites/websites (24%) and webcasts/webinars (18%).

Though social media is the second-most-popular tactic for cost containment at 41%, 28% of all users consider social media falling short of expectations for savings.

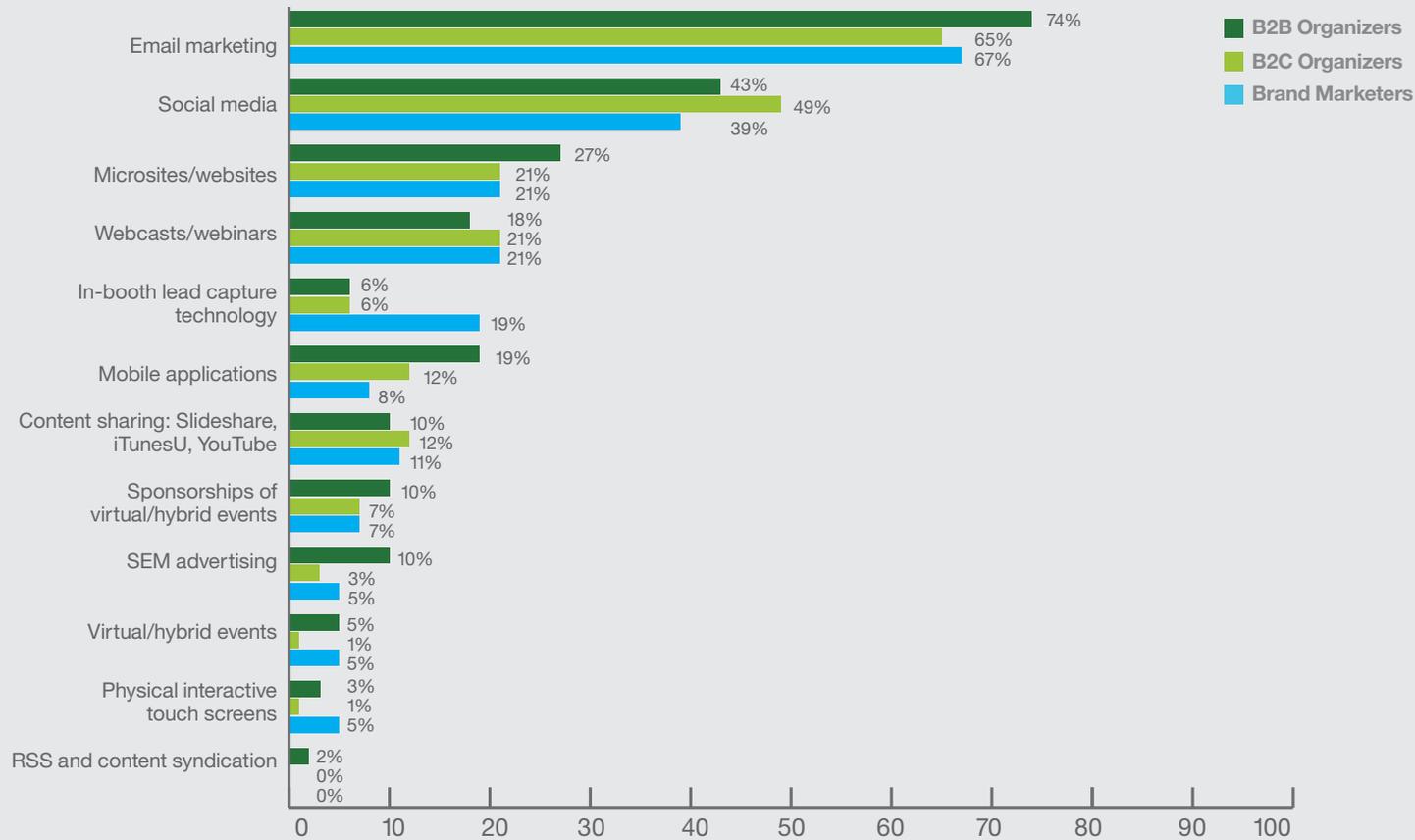
Email consistently delivers, with 71% using it for cost savings, and 81% of all users saying their needs are met or exceeded.

Microsites and webinars are top performers for organizations that use them. 89% of B2B Organizers and 83% of Brand Marketers who use this tactic indicated that microsites met or exceeded expectations for cost savings. Webcasts/webinars also exceeded expectations for cost savings for 24% of all users.

Mobile may not be saving money upfront for most respondent organizations – just one out of 10 of all respondents use mobile applications for cost-containment purposes. And one quarter of these users feel it has fallen short of expectations.

3. Cost Containment (continued)

Figure 12: Tactics used for cost-savings purposes



3. Cost Containment (continued)

Figure 13a: Success of digital tactics used for cost-savings purposes across all audiences

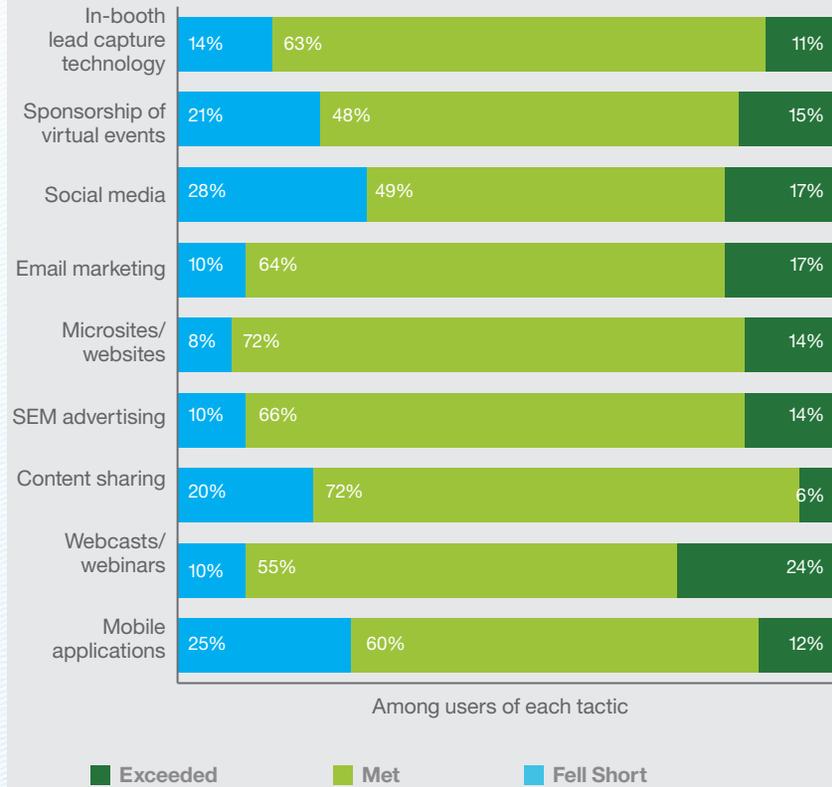
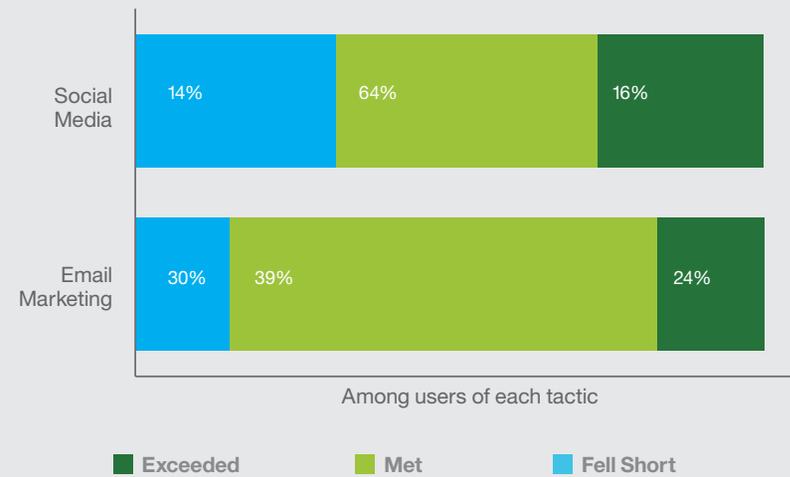


Figure 13b: Success of digital tactics used for cost-savings purposes across B2C Organizers



3. Cost Containment (continued)

Figure 13c: Success of digital tactics used for cost- savings purposes across Brand Marketers

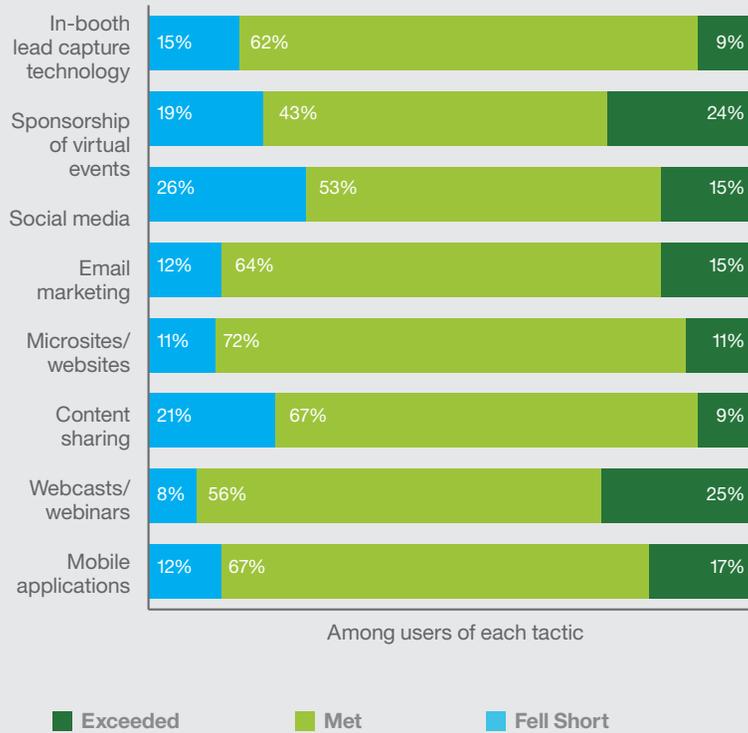
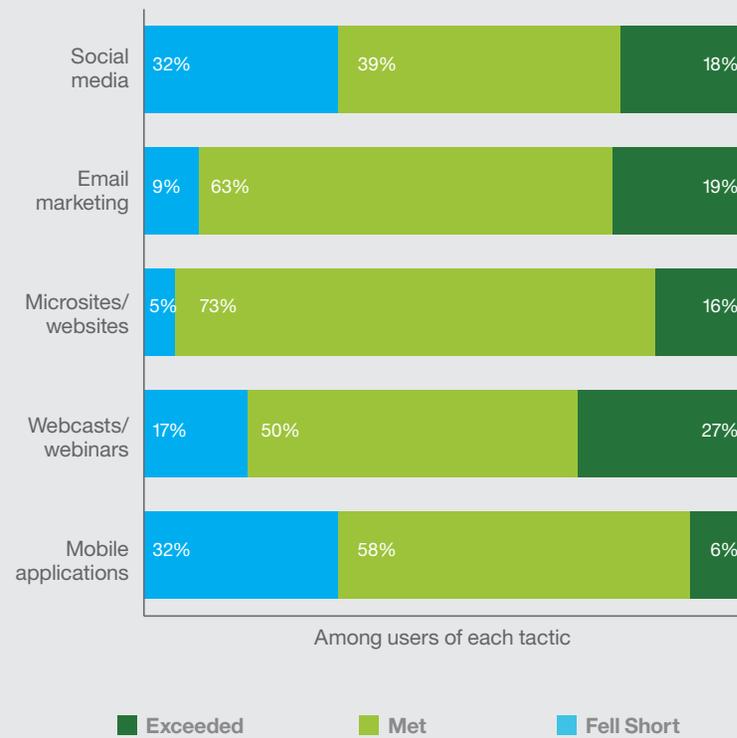


Figure 13d: Success of digital tactics used for cost- savings purposes across B2B Organizers



3. Cost Containment (continued)

Social Media and Cost Savings

Where does that leave one of our most-often used tactics, social media, in relation to cost savings? About 41% of all respondents indicate their organizations are using social media as a way to reduce costs, backing that up by shifting the budget: roughly 14% of those who have reduced traditional tactics and replaced them with digital tactics have increased social media.

And among all users who are embracing social media for cost-savings purposes, 66% indicate that effort has met or exceeded their expectations. That still leaves a large percentage who are not seeing as much success: 28% of all respondents considering social media falling short of expectations for cost savings. Among this group, we can speculate about how well they are executing, what they are measuring and to what objectives they are putting social media to use; this will help us see why they are falling short.



Recommendations

- Keep in mind that social media and digital are not the “cheap alternatives” to traditional tactics – content and time have hard costs that add up.
- All respondents seem to be trying a mix of tactics versus committing all resources into one activity; this hybrid approach may be the best way to experiment and arrive at the formula that works for your organization.
- For Organizers, email marketing reigns; perfecting email should be a priority, followed by microsites/websites, webcasts/webinars and social media.
- For Brand Marketers: streamlining delivery of content will save time and money; microsites and websites, mobile applications, and webcasts/webinars all meet or exceed expectations for 80%+ of Brand Marketers who used them for cost savings.
- Don’t underestimate webcasts and webinars. They can deliver crucial education for prospective customers.

This hybrid approach may be the best way to experiment and arrive at the formula that works for your organization.

4. Conclusions

The facts are these: Brand Marketers and Organizers are recognizing the importance of social media and digital marketing on key objectives, including revenue generation, attendee engagement and cost containment, and most either have developed or are planning to develop digital strategies to best serve these goals. From a Brand Marketer perspective, the digital interactions establish and/or nourish the relationship with the customer and should create a thirst for the face-to-face experience, where the product can be brought to life.

With 72% of all respondents expecting increased spending on digital media tactics, prioritizing is the first order of business. We've pointed out the most popular and impactful tactics for your consideration, as well as some interpretation of the data and subsequent recommendations. But we realize every situation is different.

Ultimately, your degree of success in using digital to optimize exhibition and conference investments rests on using data to frame the challenge and opportunity in terms of business impact, not technology hype. We hope the Playbook offers some relevant ideas and facts that further enable your progress in serving your audiences better while also improving business performance.

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5. Partners' Briefs

About CEIR:

The Center for Exhibition Industry Research (CEIR) serves to advance the growth, awareness and value of exhibitions and other face-to-face marketing events by producing and delivering research-based knowledge tools that enable stakeholder organizations to enhance their ability to meet current and emerging customer needs, improve their business performance and strengthen their competitive position. For additional information, go to www.ceir.org.

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About IAEE:

Trusted since 1928, IAEE provides quality and value to its members through leadership, service, education and strong relationships. IAEE is the largest association of the exhibitions and events industry in the world, with a membership of show Organizers, exhibitors and exhibition suppliers representing more than 20,000 exhibitions and buyer-seller events around the world. IAEE advocates and promotes the awareness of face-to-face exhibitions and events as the primary medium for business development and growth and provides relevant, timely and innovative education to its members and the industry. Visit www.iaee.com for more information.

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About George P. Johnson (www.gpj.com)

GPJ is the #1-ranked experience marketing agency enabling leading Brand Marketers to create great ideas and bring them to life through integrated experiential programs that leverage online, mobile and physical brand interactions. Clients in technology, healthcare, consumer goods, finance and other fields rely on GPJ to help them compete more effectively on a global basis by creating and accelerating relationships with customers, employees, partners, media and other influencers. GPJ is part of Project: WorldWide, the leading independent engagement marketing solutions network www.project.com. Follow GPJ at www.twitter.com/georgepjohnson.

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5. Partners' Briefs (continued)

About ASAE

ASAE is a membership organization of more than 21,000 association executives and industry partners representing 10,000 organizations. Its members manage leading trade associations, individual membership societies and voluntary organizations across the United States and in nearly 50 countries around the world. With support of the ASAE Foundation, a separate nonprofit entity, ASAE is the premier source of learning, knowledge and future-oriented research for the association and nonprofit profession, and provides resources, education, ideas and advocacy to enhance the power and performance of the association and nonprofit community. For more information about ASAE, visit www.asaecenter.org.

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About Exhibitor Media Group

The leader in trade show and corporate event marketing education, Exhibitor Media Group publishes the award-winning *EXHIBITOR* magazine - best practices in tradeshow marketing, and produces EXHIBITOR2013, the tradeshow and corporate event industry's top-rated educational conference; EXHIBITORFastTrak regional accelerated learning conferences; EXHIBITOR eTrak live online educational sessions; and GRAVITY FREE, multidisciplinary design conference. Exhibitor is the founder and sponsor of CTSM (Certified Trade Show Marketer), the industry's only university-affiliated professional certification program. Visit www.ExhibitorOnline.com. It is the tradeshow and event community's most comprehensive online resource.

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About INXPO:

INXPO is changing the way businesses communicate better with their customers, employees, partners and prospects. The company's next generation webcasting platform can be deployed as a link on a website or in an email, in an online virtual event on the company's award-winning event platform, or as part of an ongoing 365 community inside its Social Business TV product. It has more than 3,000 successful online communications programs for global customers, including Autodesk, Cisco, Freeman, George P. Johnson, Hilton, HIMSS, P&G, PCMA, TechTarget, UBM and the U.S. Department of State. For more information, please visit www.inxpo.com or via Twitter [@INXPO](https://twitter.com/INXPO).

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