

SISO CEO SUMMIT TOP NEW TECH TOOLS

MIAMI, MARCH 27TH 2017




MY BACKGROUND

- APPLE
 - +500 EVENTS DURING 25 YEARS. FROM COMDEX TO REED
 - B2B PUBLISHING & INTERNET (PEARSON+LIBERTY)
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- VESUVIO VENTURES. 35+ TECH/DIGITAL INVESTMENTS AND ADVISORY SINCE 2008
 - INTERSECTION BETWEEN FACE TO FACE/LIVE EVENTS AND DIGITAL

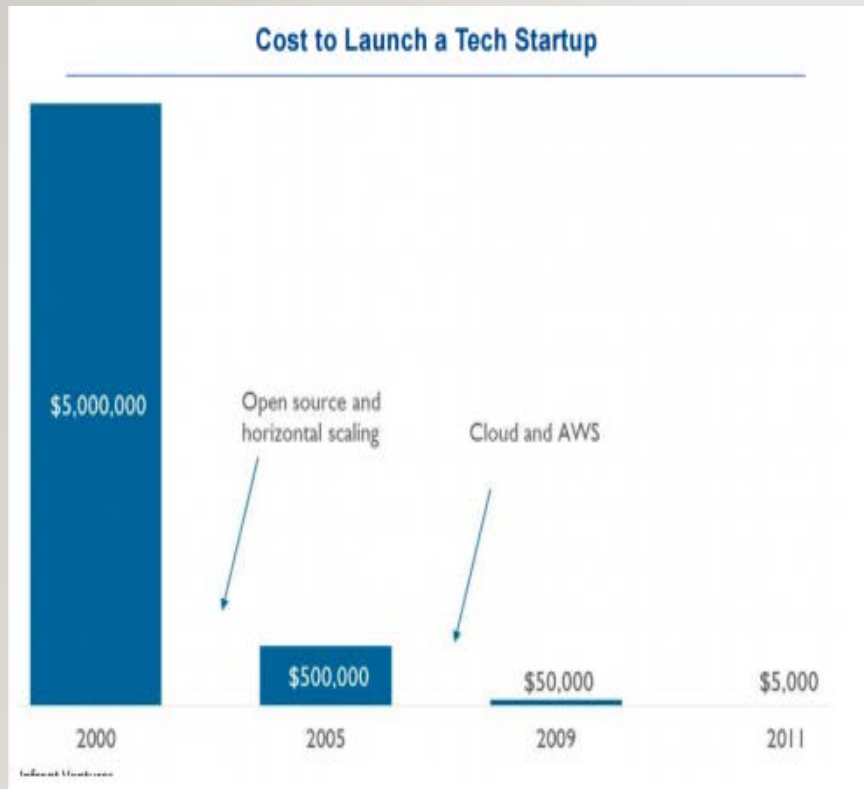


WHY EVENT TECH?

- Billions of \$ shifted from print to digital, TV to digital, music to digital
 - Dramatic disruption happening in every single industry (automotive, hospitality, retail, banking, etc.)
 - “Software is eating the world” by Marc Andreessen is five years old now but more relevant than ever
 - Startups as growth + R&D+ innovation opportunity
 - What about events/face to face to digital?
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AND WHY NOW?

Cost/Adoption/Access to capital (Seed, VC, CVC, PE). Source Mary Meeker KPCB report



HOW BIG?

- Events. \$565B+
- Digital ~2% (\$5B total market) and growing +20% CAGR
- \$1.96B during 2015/2016 (without M&A)
- 1605 companies and 372 of them VC backed and 91 companies on M&A/IPO category
- 25+ event tech related categories



MAIN CATEGORIES

- **Registration/Ticketing** +355 investments ~\$2.7B Eventbrite(\$200M), SeatGeek (\$100M)
- **Suite 23** investments ~\$605M.Active, Cvent, Etouches
- **Attendee mgmt.** \$240M DoubleDutch (\$81M) Quickmobile, Eventbase
- **Marketing** \$56M Feathr, EventFarm
- **Planning tools** \$278M HoneyBook, Eved, Social Tables
- **Big M&A deals.**Vista @ Cvent (\$1.65B) and Marketo (\$1.79B).

Source Tracxn report January 2017



POTENTIAL IMPACT

- Billions of dollars will be shifting from one category into another (remember print to digital)
- New revenue categories (i.e. retargeting to your own audience, live leadgen, live matchmaking, etc.)
- New efficiencies (more software less G&A)
- New event agenda (start way before and end way after)
- B2B marketplaces are now real.
- VR/AR coming soon
- Digital players executing live events



A full-page photograph of a surfer in a black wetsuit riding a yellow and orange surfboard on a massive, curling blue wave. The surfer is positioned in the lower center of the frame, dwarfed by the scale of the wave. The water is a deep, vibrant blue, and the wave's crest is white with foam. The overall mood is one of awe and adventure.

YOU CAN'T STOP THE WAVE,
BUT YOU CAN LEARN TO SURF.
JON KABAT ZINN