

Center for Exhibition Industry Research

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Center for Exhibition Industry Research

EXHIBITION INDUSTRY
FOUNDATION

Co-produced with



M&A for the Media & Information Industries

Digital + Exhibiting Marketing Insights 2010

Improving Exhibition Marketing Performance Through Better Digital Integration

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Forced to contend with a slowly recovering global economy and lingering unemployment, as well as renewed pressure to deliver bottom-line results, corporate brand-side marketers and show producers are increasingly integrating digital media into their face-to-face activities.

Findings from the *2010 Digital + Exhibit Marketing Insights* report show that respondents are more actively exploring the application of digital media to their events and lining up the tools and talent to capitalize on the opportunities available.

At this critical juncture, the Center for Exhibition Industry Research (CEIR) has again partnered with George P. Johnson Experience Marketing to explore the intersection between digital and exhibit marketing, providing data to guide strategy, allocate budget, audit capabilities and benchmark results.

Co-produced with The Jordan, Edmiston Group, Inc. (JEGI) and with the support of the Event Marketing Institute, this year's report highlights the evolution of the industry's approach to digital, with a special focus on the purpose of different digital tactics and their use across various stages in the event lifecycle. The findings reveal that the exhibition industry is finding digital, in its many forms, to be an excellent means of increasing reach and improving efficiency.

As expected, respondents report an increasing use of digital media across the board, yet some channels are more frequently leveraged than others. Interestingly, exhibition and event marketers seem to be using conventional digital communication methods, such as e-mail and website "platforms," to build new tactics such as social media, choosing incremental integration over outright revolution.

The significant uptick in digital usage and investment among marketers in the exhibition industry speaks to the evolution of the exhibition engagement model and how quickly marketers in this space are making strides to enhance the attendee experience, deepen engagement and measure performance.

Specifically created for exhibition and event marketing executives with P&L responsibility, the *2010 Digital + Exhibit Marketing Insights* study sheds light on where this community can focus its energies to yield optimal results. The data can be used to create the case for increased exhibition marketing budgets, to link more closely with digital assets, and to deliver better results.

Digital + Exhibit Marketing Insights 2010

Top Ten Facts*

10. Event and exhibition professionals' focus on digital continues to increase, with 72% of respondents expecting to have digital event strategies in place by the end of the year.
9. For 27% of respondents, digital marketing decisions are made by a resident digital expert within their company's event marketing function, with 44% of respondents reporting the intention to build up their digital marketing capabilities internally.
8. Measurement of digital's impact on exhibition performance is significant but not yet a best practice among those surveyed, with only 43% measuring these activities.
7. Forty percent of respondents report having up to 10% of their exhibition budgets allocated to digital sponsorship.
6. The digital tactics respondents most frequently integrate into their event promotion lifecycle include online advertising (48%) and e-mail (39%) pre-event, SMS/MMS (41%) during the event, audio downloads (40%) post-event, and RSS (57%) throughout.
5. Over half (61%) of respondents use virtual events (inclusive of webcasts/webinars as well as 2D/3D simulated trade show environments) to complement live events.
4. Although social media is seen by 47% of those surveyed as providing significant ROI in the promotion of an event, 69% of respondents do not have the means to measure its impact.
3. While exhibition and event marketers continue to look for innovative digital media to engage audiences, interestingly, e-mail marketing (85%) is perceived as the tactic that provides the greatest ROI in the marketing of an event.
2. Forty-six percent of respondents report increasing the use of digital marketing in event promotion over the past year; 78% believe digital marketing increases the effectiveness of exhibition promotion.
1. The leading motivators for exhibition and event marketers to integrate digital marketing into their event marketing promotional plans are to drive awareness (71%), extend reach (70%) and increase event attendance (61%).

* Top ten findings are based on the response of the entire survey sample.

Methodology

Conducted online between May and June of 2010, the *Digital + Exhibit Marketing Insights 2010* study was fielded and managed by a third-party market research firm to insure objectivity. The research focused on capturing the perspectives of corporate brand marketers who manage exhibition portfolios and exhibition producers who create and produce exhibitions and other events.

The online survey was conducted among 242 professionals mainly from the U.S. (86%) who identified themselves as a business-to-business (B2B) exhibition producer, business-to-consumer (B2C) exhibition producer, corporate brand marketer (CBM), or advertiser (ADV).

Thirty-three percent of exhibition management respondents and 15 percent of corporate brand-side respondents maintain executive level titles. Fifty-two percent of corporate brand-side marketers represents companies that generate more than \$1 billion in annual sales revenue. (See Figures 2 and 3.)

FIGURE 1. Where is your company's headquarters?

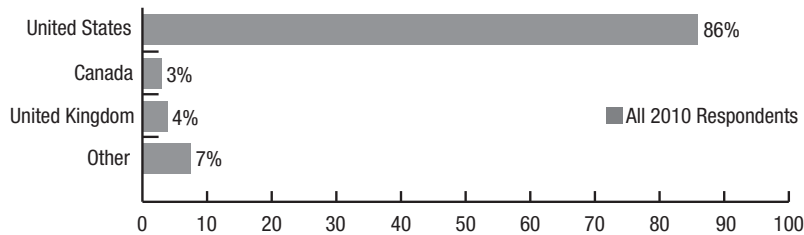


FIGURE 2. Which of the following best describes the approximate annual revenue of your company?

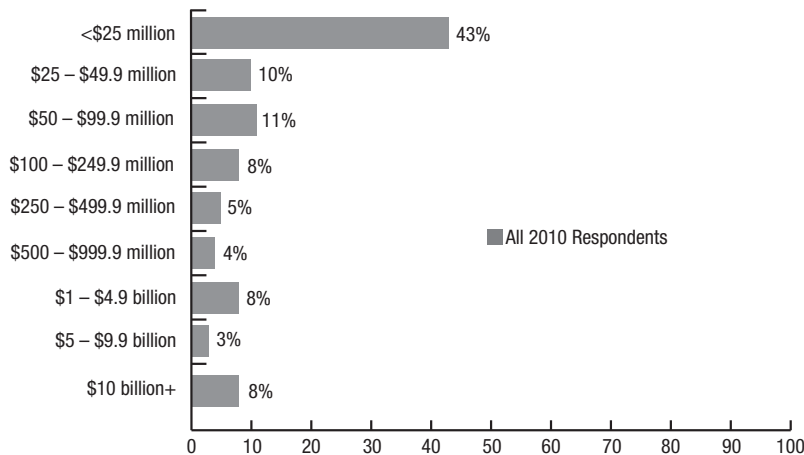
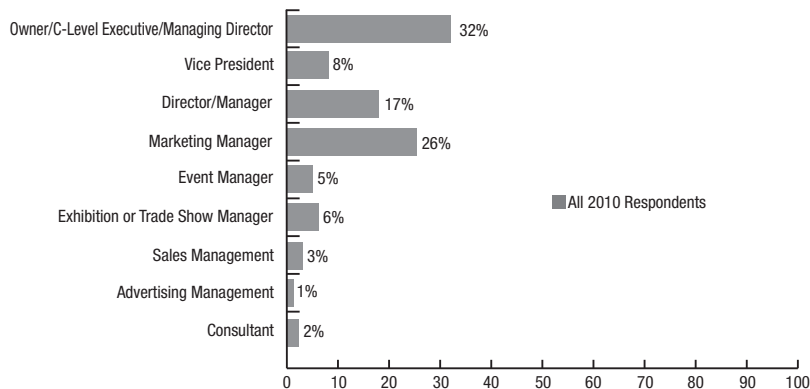


FIGURE 3. Which of the following best describes your official title or position?



Digital Media Taxonomy

For the purposes of this report, digital media includes the following tactics:

- E-mail marketing/advertising
- Online advertising (banner ads, search marketing)
- Audio downloads/podcasts
- Webcasts
- Online video
- Online games
- Web site/microsites
- Social media sites (Facebook, LinkedIn, Twitter, etc.)
- RSS
- SMS/MMS Mobility
- Virtual media/virtual complements to live events
- Web-based event management tools
- Blogs
- Google Adwords

Virtual media includes:

- **Webinars:** seminars conducted over the Internet. In contrast to webcasts, webinars are designed to be interactive between the presenter and the audience.
- **Live Webcasts:** live audio, video or multimedia distributed via the Internet or on digital networks (webcasts can only be considered events when the content is live).
- **Web Conference:** a group meeting or live presentation over the Internet. Web conferences use screen sharing accompanied by voice communication via telephone or VOIP. Text chat is sometimes used to complement, or in place of, voice communication.
- **Events in Virtual Worlds:** meetings that take place in virtual worlds such as Second Life. These can be as simple as a speaking opportunity, or as complex as a full-blown virtual conference with robust multimedia, multiple speakers and sessions, networking opportunities, product demonstrations, virtual tours, etc.
- **Virtual Events:** similar to face-to-face exhibitions, but all elements are online. Virtual events include such elements as an exhibition hall, a conference center for keynotes, panel discussions, breakout sessions, a lounge for attendee networking, and a resource center for distribution of content.

Digital Marketing Best Practices

In the last 12 months, the mandate to “do more with less” motivated both exhibition management and corporate brand-side marketers to further explore the cost efficiencies afforded by online media, resulting in usage across a broader range of platforms.

The ever ubiquitous e-mail, however, remains the favored digital tactic among respondents overall, followed by exhibition producers choosing social media and corporate brand-side marketers relying on websites as the second-most-used digital communications channels.

Respondents’ use of social media, blogs, virtual events and online video has flourished since 2009. Corporate brand-side marketers in particular have embraced online gaming and increased their usage of mobility marketing and RSS over the past year.

B2C organizers use blogs to a much lesser degree than B2B, 35 percent versus 53 percent, respectively. B2B organizers (37%) use mobile/text messaging to a lesser degree than their B2C counterparts (45%). Perhaps a marketing opportunity for B2C organizers is to use online video to promote their events, as only 32 percent use the medium versus 47 percent of B2B exhibition organizers.

While the impetus for increased usage across the spectrum of digital media is partially related to budgetary constraints, closer inspection of the data reveals that marketers are choosing the online channels that not only provide greater insight into their customers’ preferences but also give their audiences a platform to engage with the brand on their own terms.

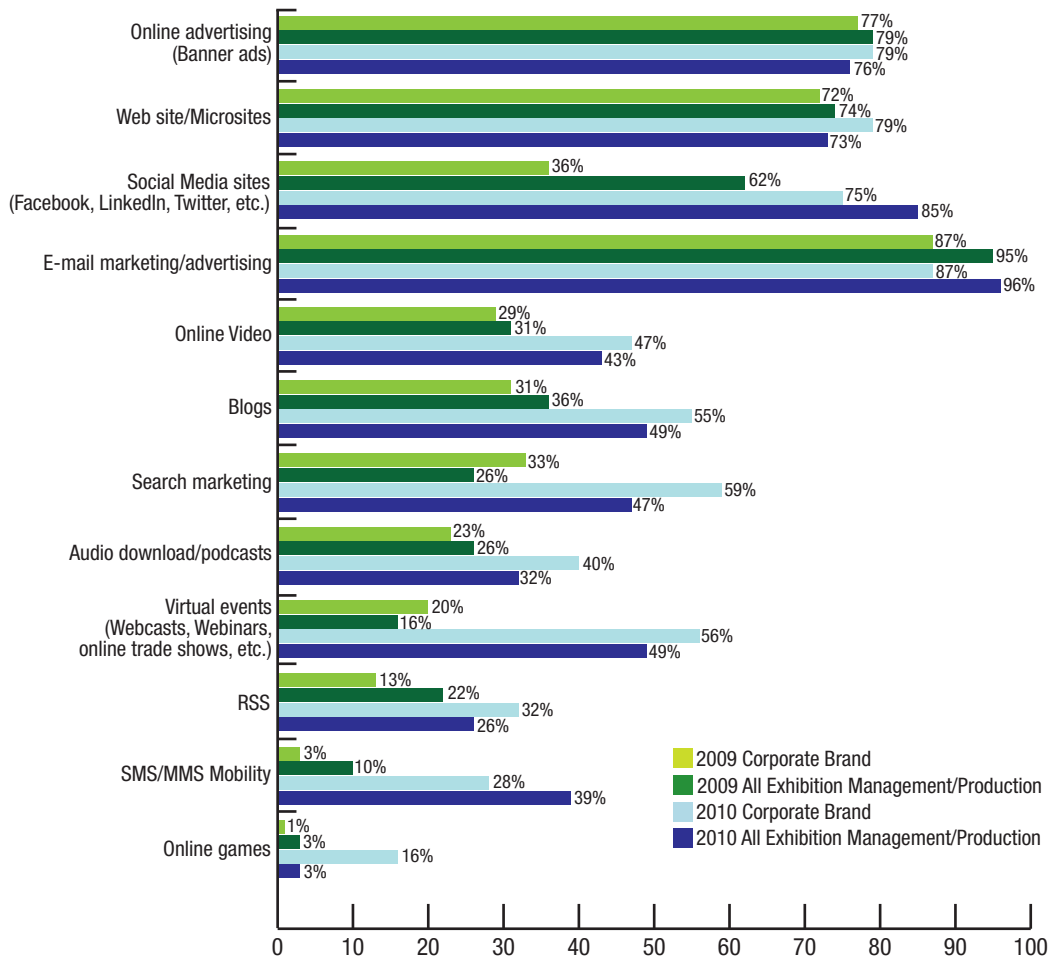
This lean towards interactive, content-based tactics (rather than interruptive, more broadcast-type messaging) suggests that marketers and their producer counterparts are intuitively replicating the most potent aspect of experiential activity – creating dialogue and relationships through personalized interactions on the show floor – in complementary digital media.

This customer-centric approach aligns with the increasingly experiential nature of the exhibition engagement model and marketers’ efforts to build and nurture communities of interest around their events.

“The digital medium has already proven to be most effective in terms of market penetration and cost containment for overall marketing strategies. High Point’s marketing program, for some time, has embraced a strong social media component as well as more customized and highly targeted communications that can reach directly into the hearts and minds of the customers we seek to engage.”

– Brian Casey, CEM
President & CEO, High Point Market Authority

FIGURE 4. Which of the following digital marketing tactics do you use?



The Right Digital Tools at the Right Time

Exhibition marketers are charged not just with creating on-site, physical connections, but also with driving demand via a consistent drumbeat of communications across numerous channels.

To that end, this year's survey asked respondents to point out the digital marketing tactics they used at different points across the event lifecycle. Overall, respondents most frequently integrated the following tactics into the event promotion lifecycle: online advertising (48%) and e-mail (39%) pre-event, SMS/MMS (41%) during the event, audio downloads (40%) post-event, and RSS (57%) throughout the cycle.

FIGURE 5. Please specify at what point in the lifecycle of an event you use the following digital marketing tactics: Before, During, After or Throughout?

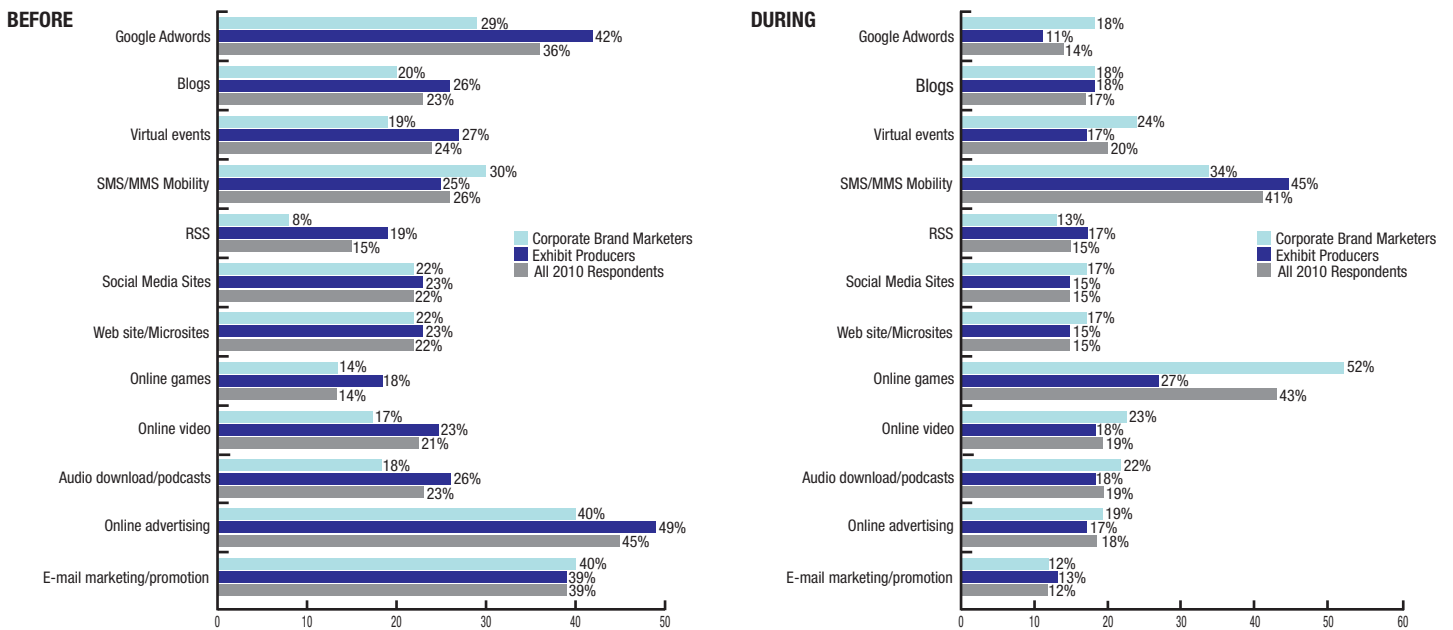
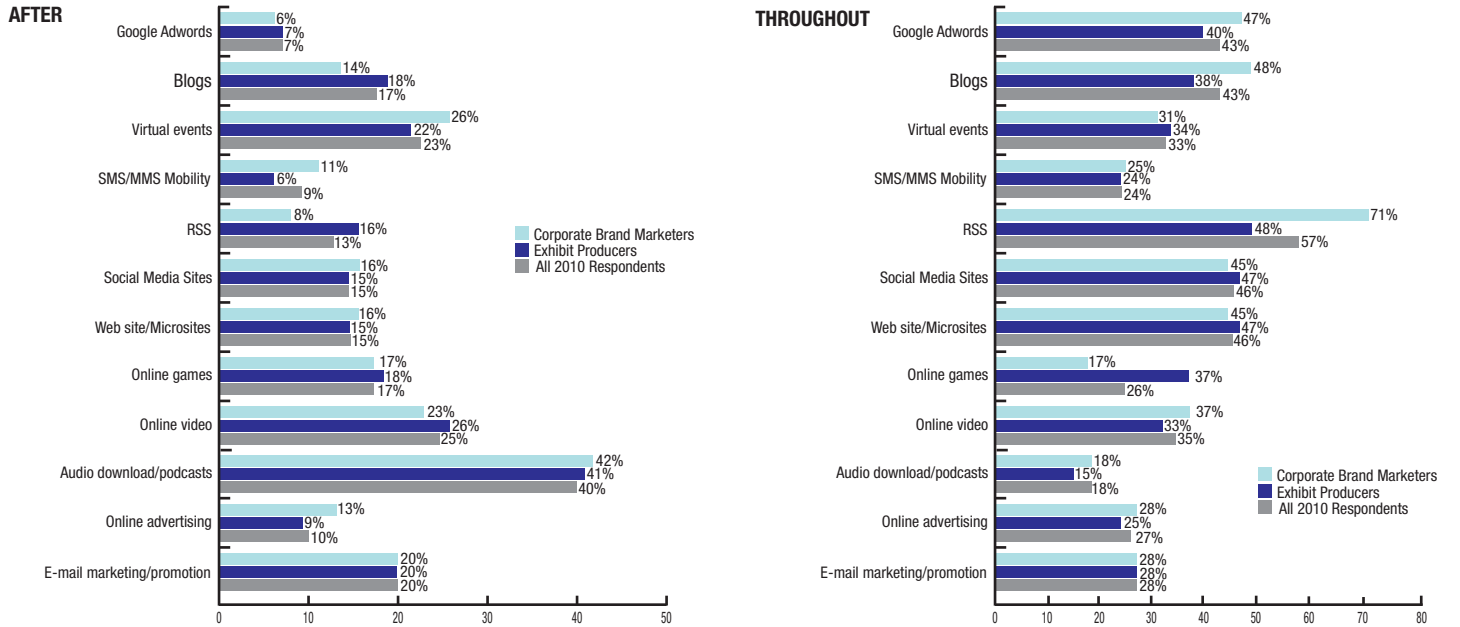


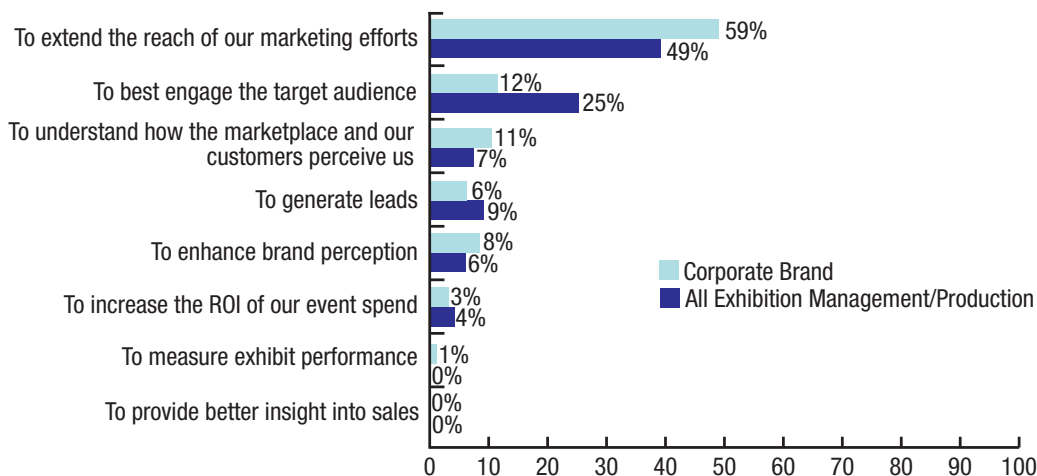
FIGURE 5. Please specify at what point in the lifecycle of an event you use the following digital marketing tactics: Before, During, After or Throughout?



Social media was another medium favored nearly equally by both exhibition producers (47%) and corporate brand-side marketers (45%) for use throughout an event. Seen as another means of extending reach (Figure 6), respondents have more enthusiastically embraced social media this year, likely spurred by audiences' increasing adoption of social media platforms.

The industry seems to understand the importance of staying aligned with how audiences are consuming media and creating their conversations and are adjusting accordingly.

FIGURE 6. Which one of the following statements best describes why you include social media tactics in your marketing efforts?



In general, the respondents seemed to align on timing and usage of many of the digital channels, but there were a few disparities. Exhibition producers tended to leverage online advertising pre-event and SMS during their events more frequently than their consumer brand counterparts. For their part, corporate brand-side marketers more aggressively incorporated online games during events and RSS and blogs throughout their events.

These unaligned media preferences illuminate the different roles and objectives of show producers versus exhibitors. Exhibition producers are focused on driving overall attendance and engaging a broad audience, while corporate brand marketers are concerned with creating more custom contextual content to resonate with clients and prospects.

Understanding this important difference can help both groups ask the right questions of one another and develop more integrated strategies that will, in the end, deliver a better experience to the community. The data suggests that digital should be part of the upfront conversation between these two groups.

The Rise of Digital Strategy in the Exhibition Industry

It is not surprising that, for the second year in a row, the majority of exhibition marketers surveyed cited digital's ability to extend reach as the reason for integrating the medium into their event promotion efforts (Figure 7). However, only 39 percent of B2C organizers have developed a digital marketing strategy when compared to B2B organizers (54%) (Figure 8).

This ongoing focus on using digital media to optimize the event spend has given rise to the development of digital event strategies among this group: nearly three-quarters (72%) of respondents report that they will have digital strategies in place by the end of the year, with 46% of exhibition producers and 40% of corporate brand-side marketers planning to bring digital marketing capabilities in-house (Figure 9).

FIGURE 7. Which of the following statements best describes why you include digital marketing in your event programs?

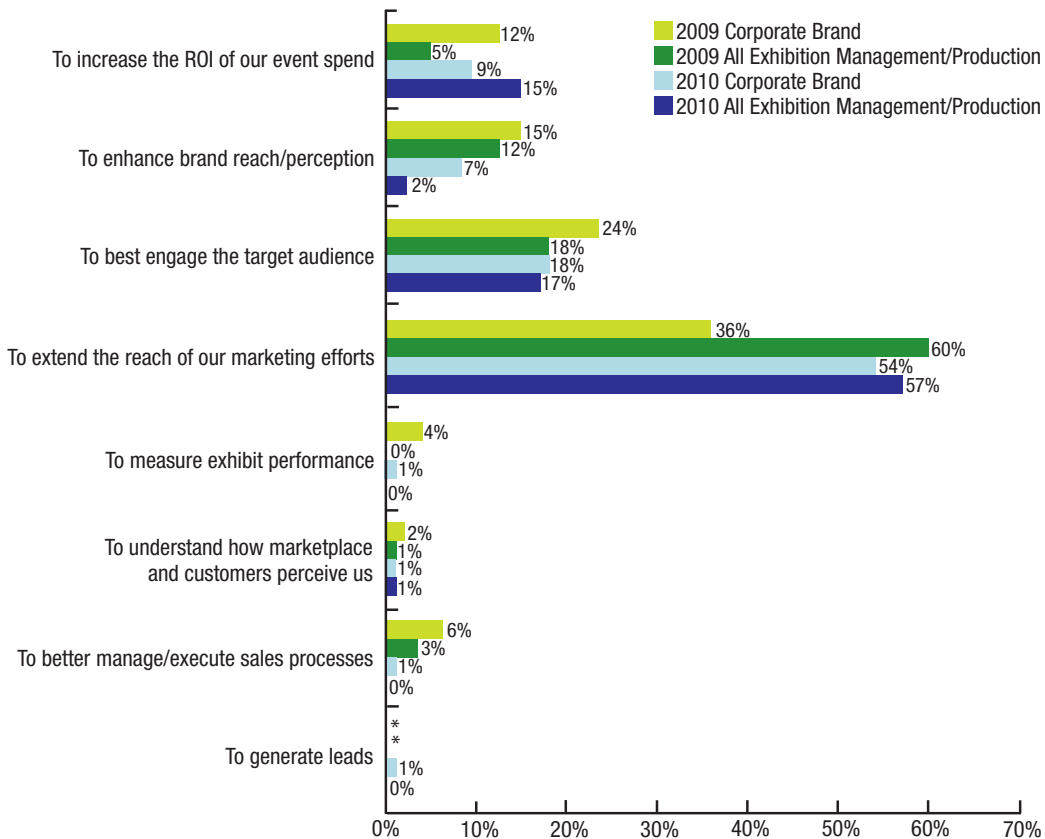


FIGURE 8. Do you have a cohesive digital marketing strategy for your events?

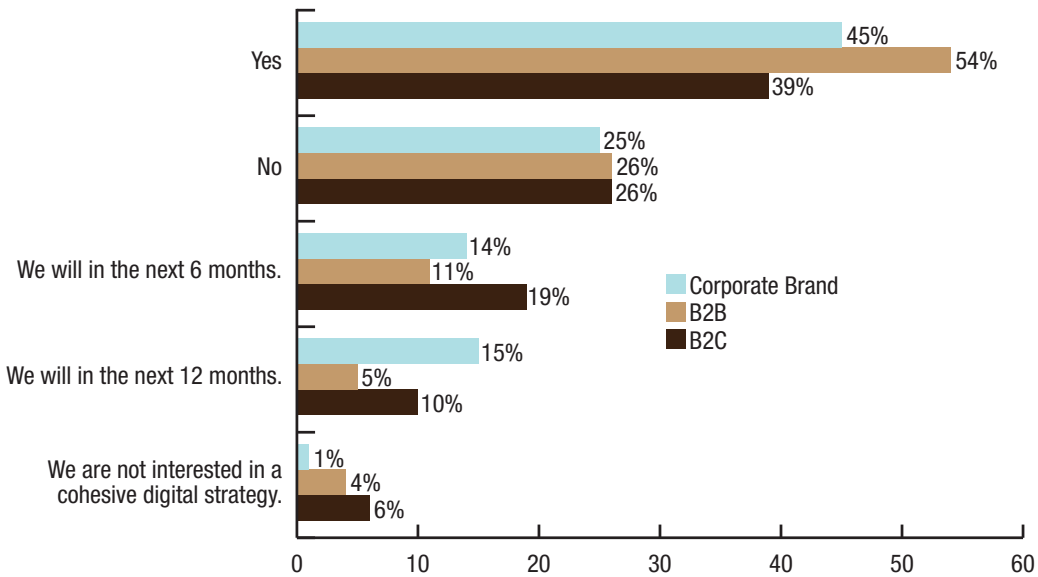
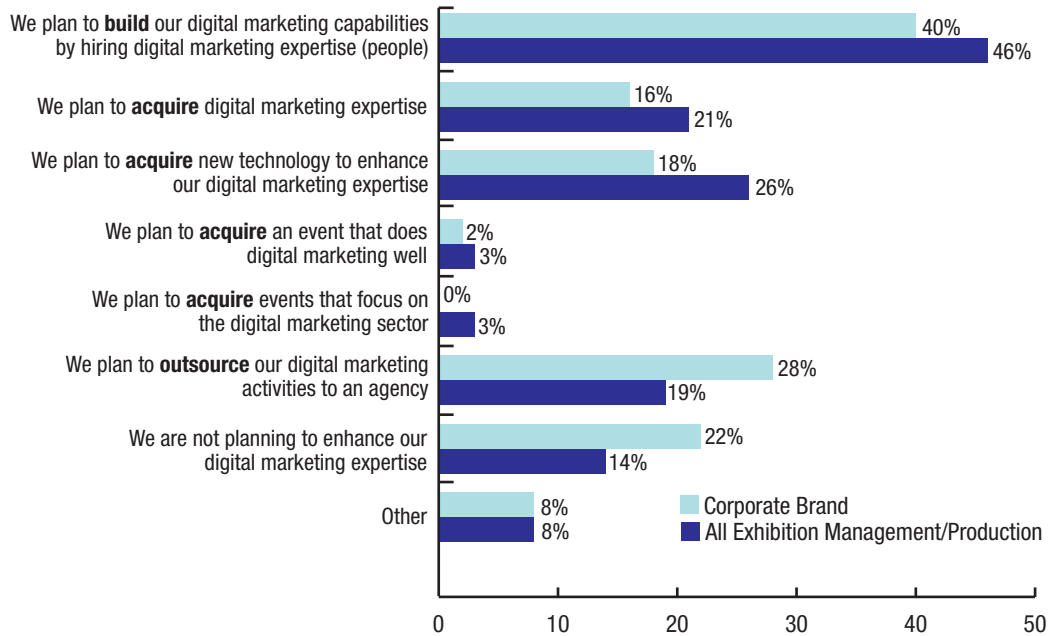
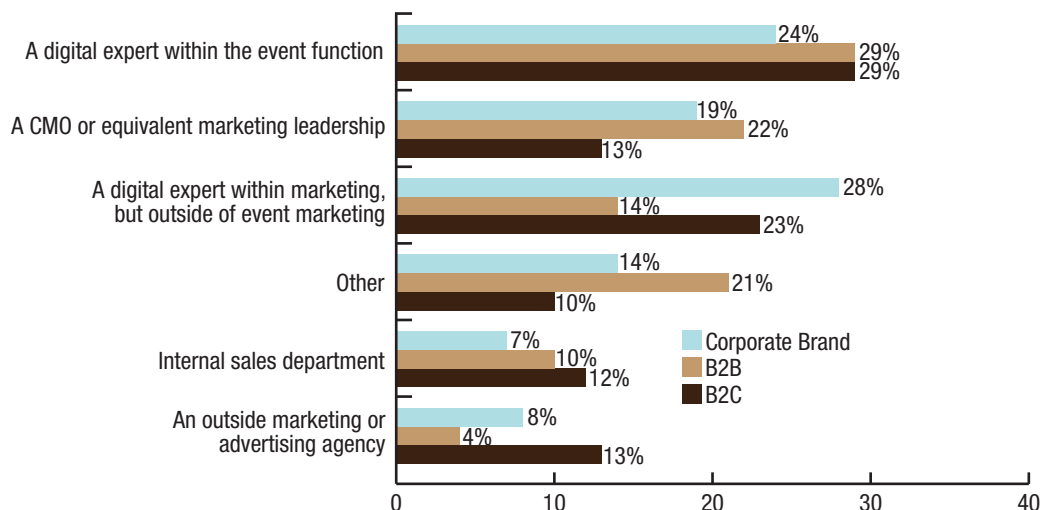


FIGURE 9. Do you plan to build, acquire or outsource your digital marketing expertise? Total < 100%



At present, respondents indicate their digital strategy is influenced by three primary groups: digital experts within the event function, CMO's or equivalent marketing executives (especially among corporate brand-side marketers), and digital experts within marketing but outside the event function (Figure 10).

FIGURE 10. How are decisions made with regard to digital marketing practices at your organization?



The Reality of Virtual Media

There has been great anticipation, as well as apprehension, for virtual events and the impact they will have on live exhibitions. The data suggests that the industry views the benefits of virtual events as outweighing the potential risks. As might be expected, IT industry respondents report the highest adoption rate of virtual events, with usage among those in the events space coming in a close second (Figure 11).

The potential for significantly reducing travel and event management costs makes virtual particularly valuable to brand-side marketers. Using virtual to complement live events and attracting would-be attendees is what appeals most to exhibition producers (Figure 12).

The value of virtual events comes into question, though, when looking at the ability of these events to engage audiences. The majority of respondents feel virtual is only somewhat effective at this task (Figure 13). Interestingly, when asked to compare the effectiveness of virtual exhibitions with face-to-face exhibitions in terms of driving sales conversions, exhibition producers and corporate brand-side marketers have similar opinions on the subject, with only one-third of respondents (35%) believing the face-to-face event format is more effective.

Yet what is more telling is how many of those surveyed could *not* make an evaluation: On average 29% of the sample do not attempt to compare the two event types, 19% simply do not know which is more effective and 16% *cannot* compare effectiveness because success for the two formats is measured differently.

These findings suggest that more experimentation is needed to develop methods and analytics to determine the effectiveness of virtual events versus traditional exhibition marketing. For now, the perception of cost-savings – not effectiveness – seems to be largely driving the conversation around virtual events, especially for corporate brand-side marketers.

FIGURE 11. [Yes to Virtual Events]: Which of the following best describes the industry in which you work?

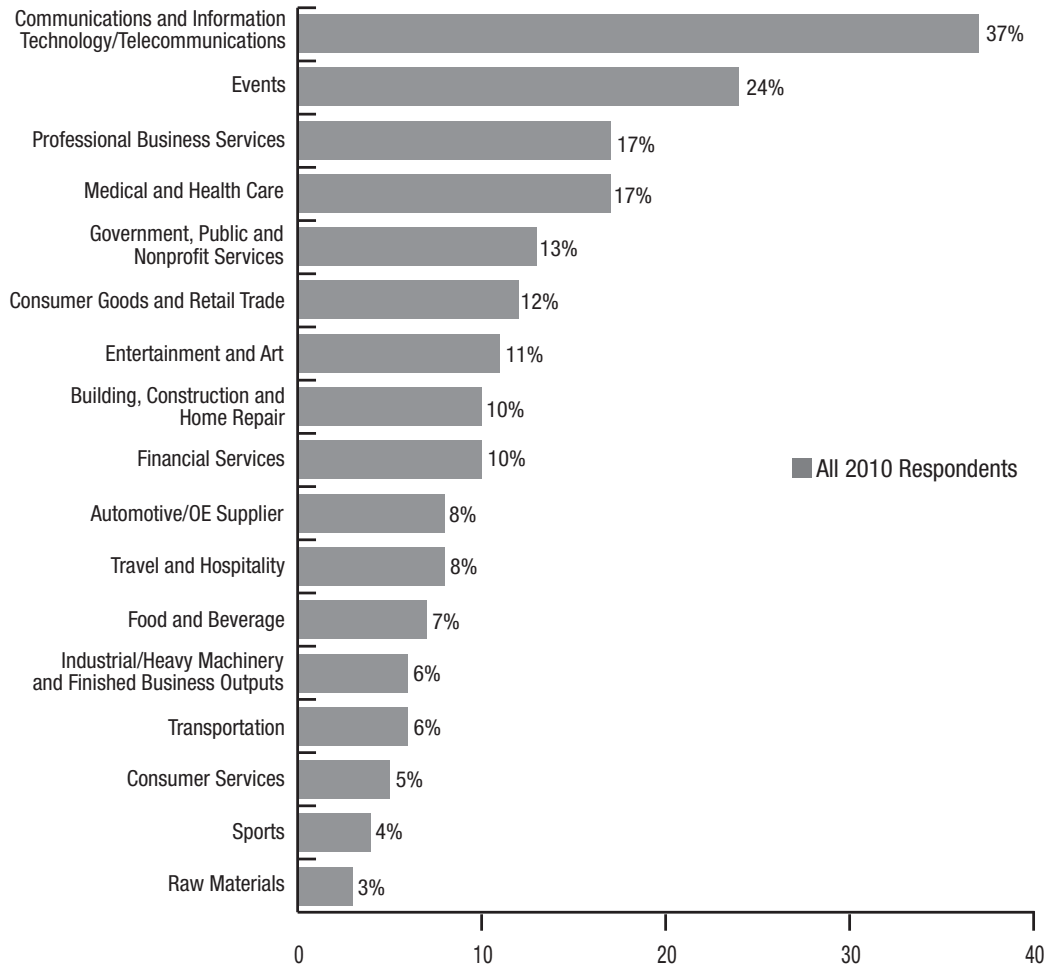


FIGURE 12. Which of the following represent the top three reasons you use virtual events? Total > 100%

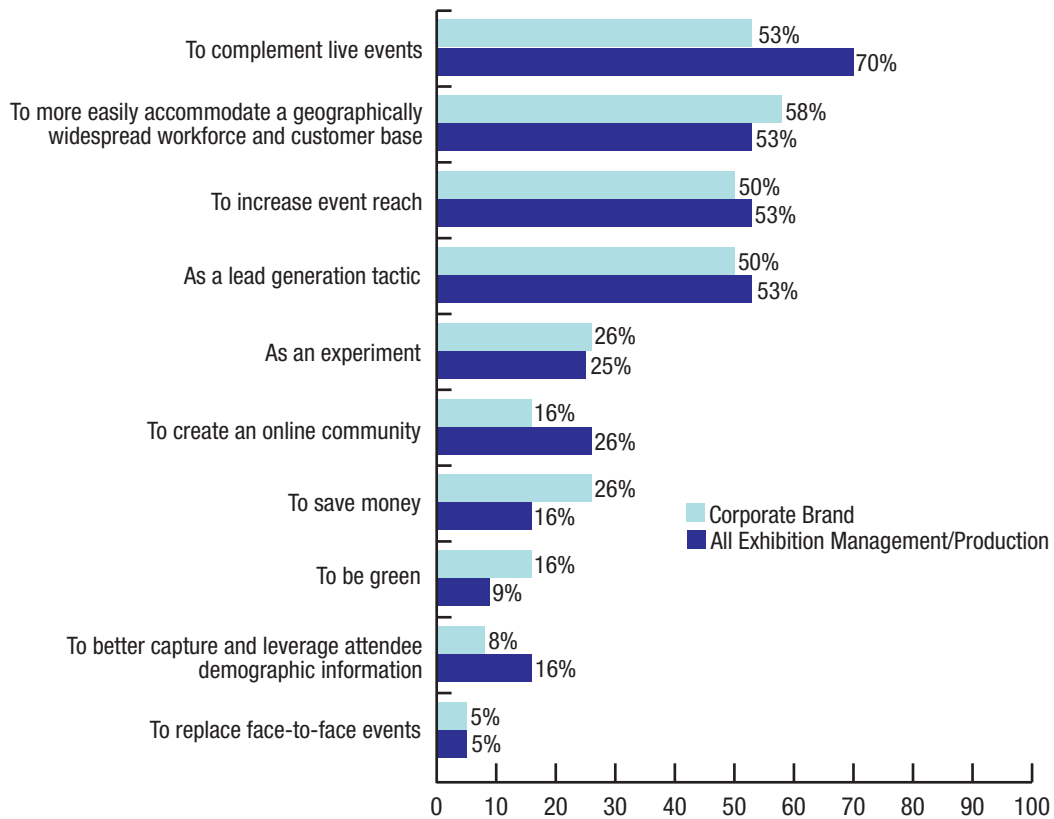


FIGURE 13. How effective do you think virtual events are at engaging audiences?

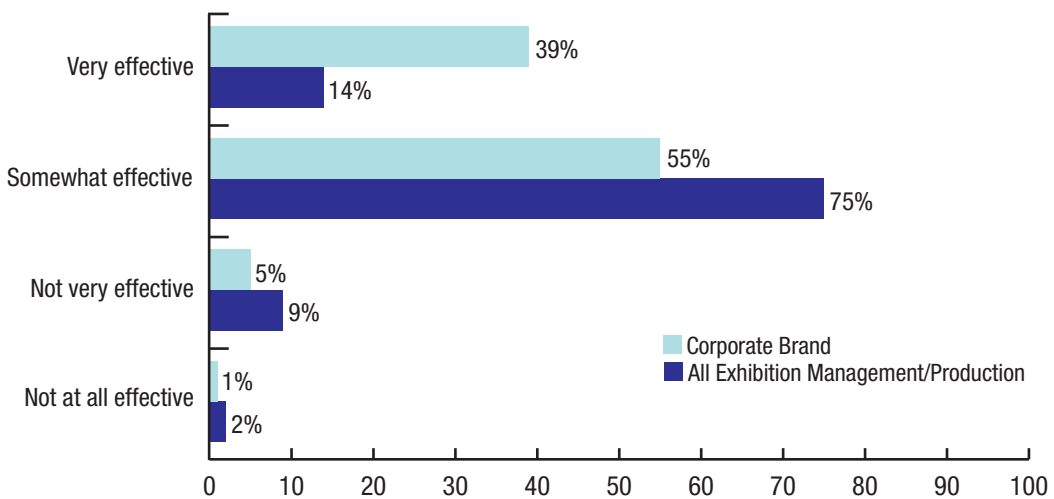
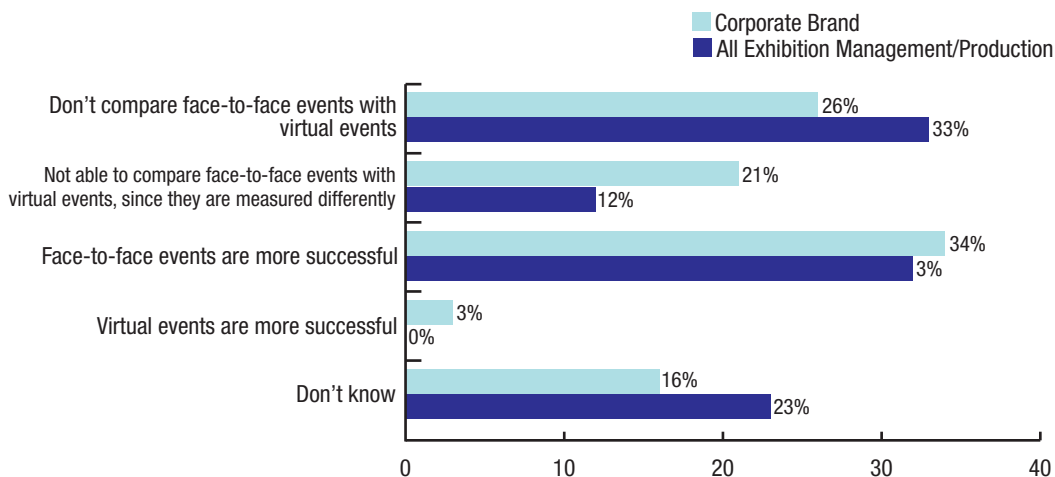


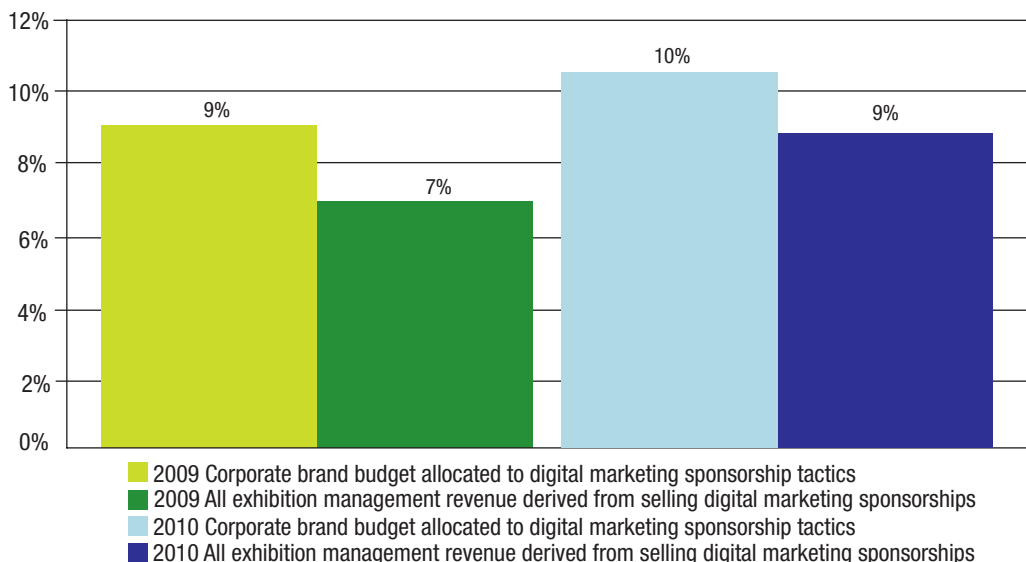
FIGURE 14. When comparing face-to-face versus virtual events' impact on sales conversions, in your experience, which event type has been more successful?



The Big Picture: Digital vs. Traditional Spend

The data reveals corporate brand marketer's average budget for digital sponsorships to have increased slightly to 10% (Figure 15). The revenue show producers derive from the sale of these sponsorships has also risen to 9%.

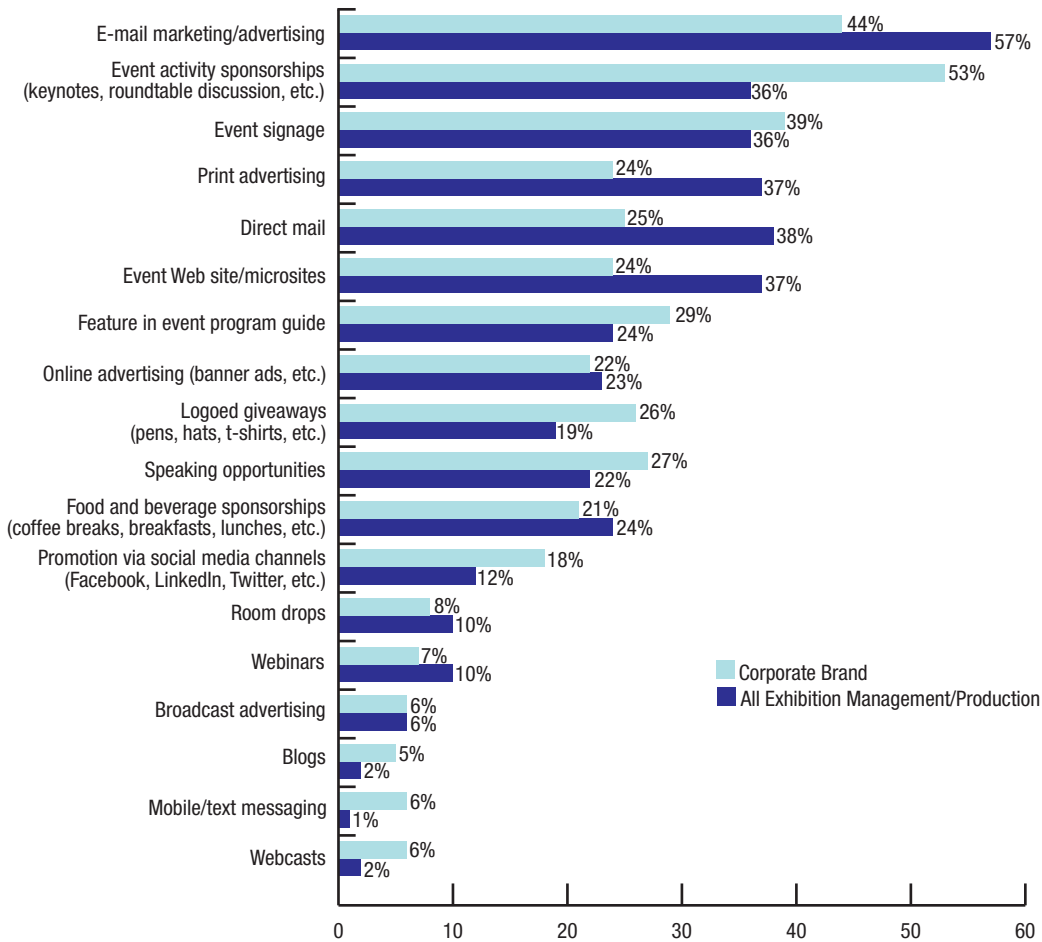
FIGURE 15. Budget Related to Digital



Looking at how exhibit spend breaks down between traditional exhibition marketing line items, such as on-site sponsorship, and more recent digital tactics, such as blogs, it is interesting to note that event marketers are spending nearly the same on proven digital tactics, such as e-mail marketing and advertising, as on traditional sponsorships such as keynotes.

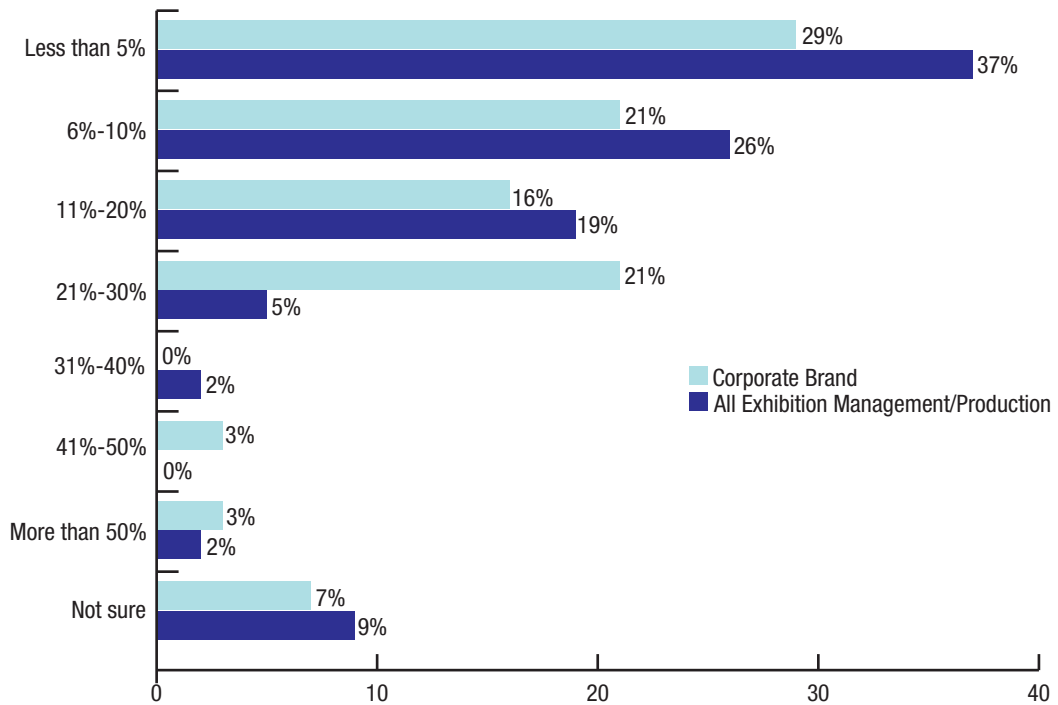
The top three sponsorship options chosen by corporate brand marketers are event activity sponsorships (53%), e-mail marketing/advertising (44%), and event signage (39%). For comparison, much discussed digital tactics, such as blogs, SMS/text campaigns and webinars, still represent mid-single-digit percentages of the overall exhibition budget (most likely a function of their lower cost and nascent popularity) (Figure 16).

FIGURE 16. Which of the following traditional and digital sponsorship options represent the largest percentage of your event/exhibition budget? Total > 100%



The continued popularity of virtual events, inclusive of such media as 2D/3D environments and webcasts, is seen in the fact that 21% of marketers are spending between 21% and 30% of their exhibition budgets on virtual events (though the majority is spending less). Those numbers are roughly in line with the producers' budgets (Figure 17).

FIGURE 17. Which of the following best approximates the percentage of your event/exhibition budget that is allocated to virtual events?



Promotional Performance and ROI

More than three-quarters of respondents (76%) confirm that they perceive digital to have a positive impact on the promotional efforts of their exhibit program – indicating that the overall effectiveness of the promotion “increases strongly” or “increases somewhat.”

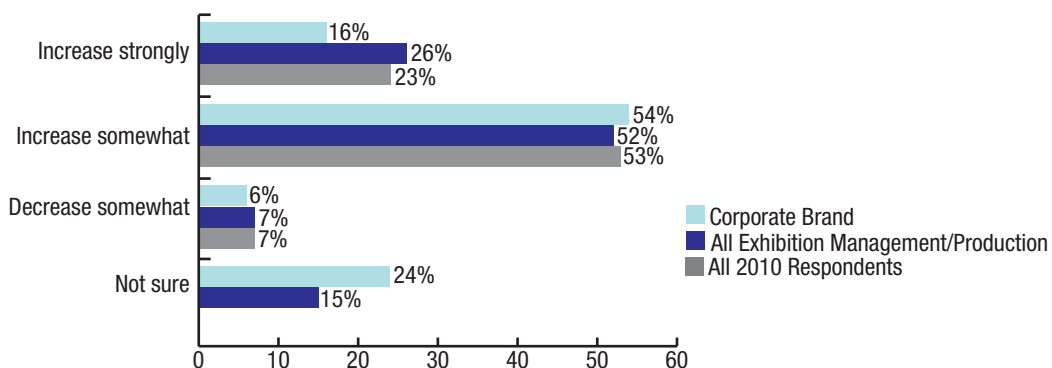
“There is no question that digital marketing is a critical component of our marketing mix – for some of our events we can attribute up to 25% of our attendees directly to our email marketing.”

– Nancy Hasselback

President & CEO, Diversified Business Communications

No respondent indicated a negative impact on promotion, and 17% indicated that they are unsure of the impact (Figure 18). Measurement has emerged as a crucial factor here, a topic which is explored in greater detail in the next section.

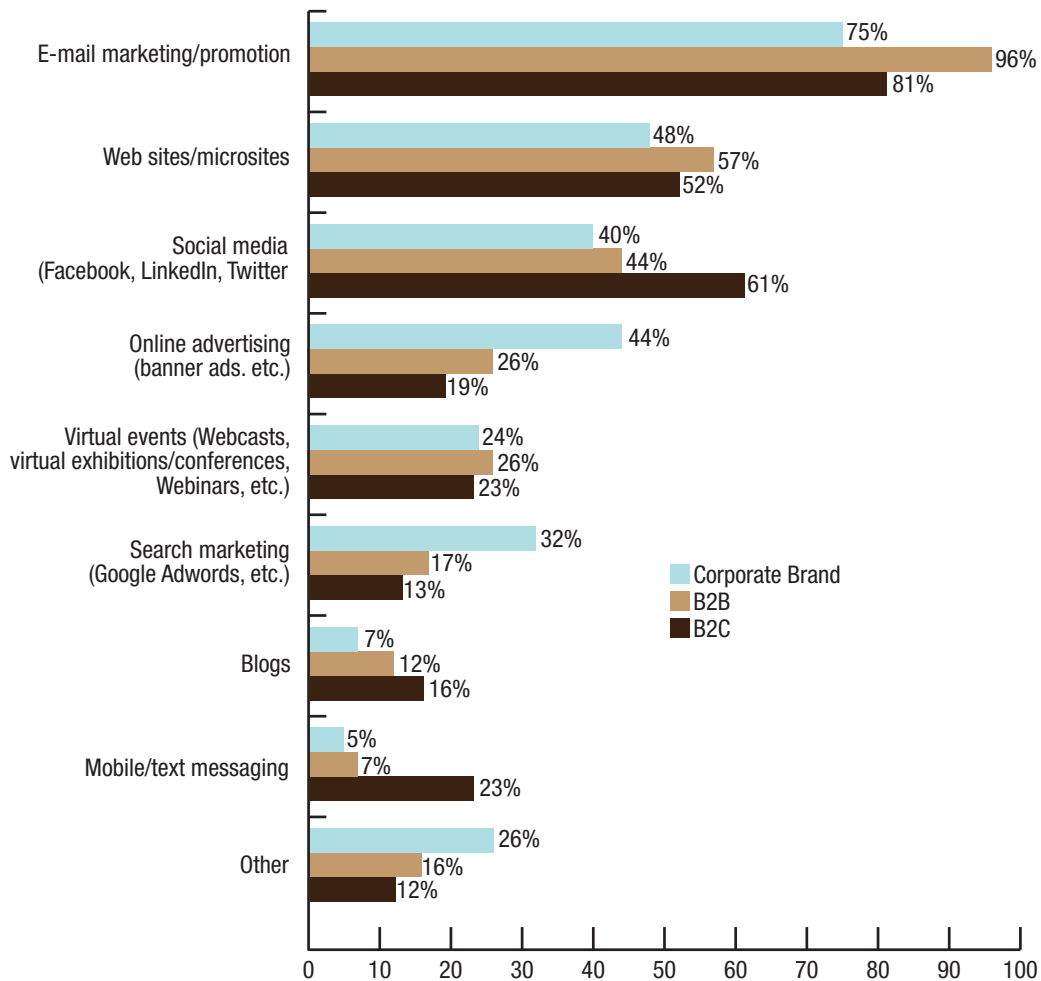
FIGURE 18. In your experience, when integrating digital marketing tactics into the promotion of exhibition programs, does the effectiveness of the overall promotion...



In terms of the value of the tactics related to marketing an event, the theme of “combining old and new” continues, with respondents ranking e-mail (85%), websites (54%) and social media networks (47%) highest in providing ROI.

One interesting conclusion to be extrapolated from questions of performance and ROI is that the exhibition marketing community is taking cross-channel integration very seriously. The results indicate not only that the industry is actively using online display advertising, search marketing, blogs, SMS and other digital tactics, but that they are using them enough to understand which ones produce ROI and measureable performance.

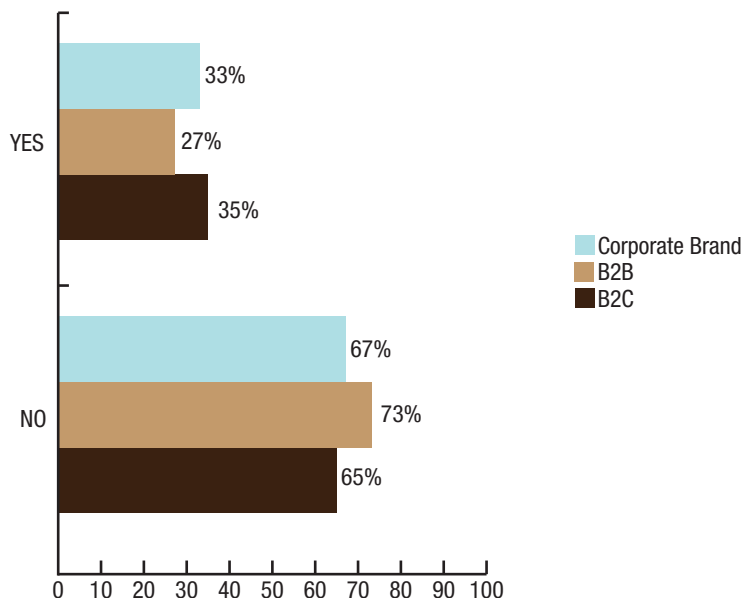
**FIGURE 19. Which three of the following tactics provide the greatest ROI in the marketing of an event?
Total > 100%**



Measurement

An interesting insight arose from analysis of response data on the ROI of social media: a full 69% of respondents indicated that they are not able to quantify the ROI of their social media tactics (Figure 20). Yet, as seen in the previous section, social media ranks near the top in terms of ROI in the marketing of an event. What would account for that conflict?

FIGURE 20. Are you able to quantify the ROI for your social media tactics?



One explanation could be that social media networks, such as Facebook, and platforms, such as Twitter, are seen by the exhibition community as a relatively low-cost way to create online buzz and awareness. Results can include conversations on Twitter, comments on blogs, and postings on a Facebook fan page. In terms of event ROI, however, there are still few who have built measurement and analytics models that accurately capture the specific impact social media has on their events in regards to revenue generated.

It seems that the community views social media as a lower-cost event promotion tool rather than a sales enablement medium, two different objectives that would skew an assessment of ROI, depending on its intended purpose.

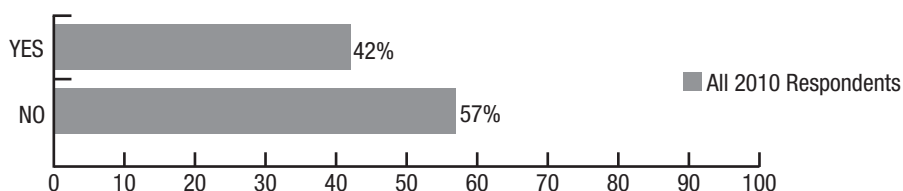
“Understanding the level of impact social media and virtual events has on our event and exhibition performance is something we’re looking at very closely right now. The prevalence of the smart phone has certainly increased the level of participation in social media on site. Now we’re focused on surfacing the correlation between that participation and on site engagement and post event conversions. One big challenge in particular is assigning value to the qualitative aspects of this medium.”

– Christine Jacobs

North America Demand Program Leader, Digital Marketing, IBM

Looking at measurement of the results of the broader digital marketing spend, it is clear that the exhibition marketing community needs to improve its digital measurement models. Fifty-seven percent of respondents indicate that they do not have methods in place to measure the outcome of digital marketing efforts within the exhibit marketing program.

FIGURE 21. Do you have methods in place to measure the outcome or results of your digital marketing efforts in exhibit marketing?



The gap between apparent industry-wide confidence in digital and the current effort/ability to capture its impact requires the immediate attention of marketers and producers. Under pressure to deliver results, the exhibit marketing community will find it increasingly difficult to allocate funds to digital marketing that do not have a measurable impact on program performance.

Conclusion and Recommendations

The increasing role of digital has been a great boon to the exhibition marketing community, but it also represents a significant challenge in terms of tying investment back to measurable performance. It is up to senior exhibition marketing leaders to draw upon the latest insights, guidance from partners and a fine-tuned understanding of their audience in order to set the right goals and put the right resources in place.

“Strong digital content-rich presence on the Web brings in new constituencies for our events; year-round digital e-letter contact with existing attendees enhances the effectiveness of marketing and raises our attendance; and both of these, along with social media, enhance our brands and credibility in our served markets.”

– Don Pazour
CEO, Access Intelligence LLC

Successful marketers will continue to incorporate digital into their exhibition marketing formulas, focusing on the strategies and tactics that enhance performance. Producers will continue to experiment with digital to figure out how to use it to differentiate their brands and serve the changing needs of their audiences.

The key to success for both groups in regards to the adoption of digital lies in collaboration—how well these two groups take an early and proactive approach to sharing goals and working to serve their shared communities more effectively.

To that end, the following are recommendations based on the data from this report:

- Conduct research into audience attitude and understanding of technographics
- Attain a deeper understanding of how audiences use social networks, mobile technology, blogs, Twitter, and other digital tactics to create a more specific and effective digital strategy.
- Audit internal and partner digital capabilities and understanding.
- Work to identify the right talent internally and externally to make better use of your resources and capabilities, as well as fill key knowledge and investment gaps.
- Institute more rigorous measurement of digital tactics.
- Use data to measure digital's impact and ROI, whether you start small and grow or embrace a comprehensive measurement model.
- Operate from an understanding of digital as both a promotional and sales tool.
- Go deeper into the data and require further exploration of these topics.

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GPJ is a worldwide experience marketing agency that creates great ideas and brings them to life through integrated live and online experiences and environments, helping clients cut through marketplace noise, differentiate from the competition and create lasting relationships that directly impact the bottom line. Ranked by *Advertising Age* as the “#1 Event Marketing Agency” and consistently placed among the world’s top marketing agencies, GPJ provides its services through 26 offices around the world. The agency’s clients won 37 awards in 2008, five Ex Awards in 2009 and took home both the Grand Ex Award as well as the Best 100% Virtual Ex Award in 2010. Follow us on Twitter at www.twitter.com/georgepjohnson.

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The Exhibition Industry Foundation (EIF) is a non-profit organization exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code. The principal purpose of the Foundation is to ensure the success of the exhibition industry as the premiere marketing medium by supporting research and education.



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