

Scenarios for the Future

Convention Exhibits & Tradeshows of 2016



A Study Presented By

**The ASAE Foundation, Center for Exhibition Industry Research Foundation,
Freeman, Gaylord Entertainment and PCMA Education Foundation**

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Scenarios for the Future: Convention Exhibits & Tradeshows of 2016

Executive Summary

The ASAE Foundation, Exhibition Industry Foundation, Freeman, Gaylord Entertainment and PCMA Education Foundation joined together to fund a unique industry project to help predict and plan for the future of convention exhibits and trade shows. This elite industry group believed there would be negative consequences for the future of exhibits if significant changes are not made in the way the industry currently functions.

As stated by PCMA President and CEO Deborah Sexton, FASAE, "The convention exhibits and trade shows professional needs new options versus the current model. Today, with the click of a few key strokes, buyers can obtain immediate answers and quotes to their queries on a 24/7/365 basis. So the goal of this investigation was to have some very smart people collaborate to envision what the future may look like and provide some guidance for discussions and actions that can happen to help our industry position for success."

The methodology for this study was multi-pronged. It included in-depth, shirt-sleeves explorations with small groups of industry professionals; larger group discussions; outreached to non-industry professionals who both do - and do not - attend tradeshows/conventions, LinkedIn postings and on-line discussions of a wide variety of challenges and trends.

"Change is the only constant" and this exercise was designed to help our industry see what changes may be on the horizon and capitalize on trends that will set up the exhibit floor for success long into the future.

There were many key findings which are fully illuminated in the full report. The highlights of what you will find in this Executive Summary are examples from the :

- **Five Scenarios for the Future**
- **Four Essential Elements to Create an Unrivaled Experience**
- **Top 10 Takeaways for Updating Your Exhibits Plan**
- **Key Questions to Ask to Determine if You're on the Right Track**

Five Scenarios for the Future

From all of the rounds of discussion, data and feedback, five "scenarios" emerged. Each of the five scenarios was developed based upon clusters of data that had common characteristics to that particular scenario. These scenarios are stated "as-if" it is already 2016. These scenarios are not business plans but rather descriptions of the 2016 destination. These 2016 scenarios invite thought and discussion of what is, or could be, a path from 2012 to reach this future outcome.

Each scenario was given a name to characterize the composition of the attributes within that scenario. In addition to the name, each scenario was further defined by a Manifesto that says what this scenario stands for and the potential mindset of those aligned with this scenario. Each scenario also includes the Risks associated with that scenario missing the mark in describing what the 2016 outcome could be.

Not all may be ready for the scenario below. Perhaps another is more fitting for you. For a specific show, taking the best parts of each scenario might create the best course of action.

5. Sample Scenario (See all 5 scenario descriptions and discussions in the full report.)

5. "The Big Reset"

- **Manifesto:** *We are committed to reinventing our show from whole cloth*
- We are building new ideas, never seen before, from the bottom up
- Top industry professionals select the best products and services from our industry to be showcased in this juried event
- Strong entertainment and "public-oriented" component to the event that has nothing to do with former exhibitors
- No direct b2b business will be done at the event
- Promote the event to raise public awareness of our industries best products and services; and what we do (as an industry or association or group)
- Possibly look for a strong equity partner or sell some/all of the equity in the event

Summary: Work with industry best products and services to show/tell public who we are and what we do

Risks: Was a mistake; no big idea; too much money spent for too little return

The full scenario summaries capture the essence of each of the scenarios. The body of this report carries the complete description of, and additional information about, each scenario. The additional information about each scenario includes the following:

- Manifesto
What is it this scenario stands for? What is the mindset of those aligned with this scenario? How might they think in general?
- Design Principles
What are the key elements of the scenario we should look to measure or manage? How might we manipulate factors in this scenario to make it work in our favor or toward our business advantage?
- Risks
What are the risks posed by this scenario to those in the industry? Who is more or less affected? What will warning signs look like?
- Business Model Indicators
Current and future data points and measurements that should be utilized to monitor the progress and success of a scenario as an evolving business model

Four Essential Elements to Create an Unrivaled Experience

Two group discussions stood out for the additional insights they provided to this study. Each group was asked a question which they discussed extensively. The results of each discussion are illuminating.

Group 1 Question: "What are the elements of experience that factor into the show of the future?"

Answer: *There are four essential elements to an exceptional and unrivaled experience:*

1. "It will disorient participants to make them more present" (Translation: Engagement)
2. "It will be meaningful at the individual level" (Translation: Value)
3. "It will enhance the identity of the attendees" (Translation: Community)
4. "It will make attendees co-creators" (Translation: Ownership)

Group 2 Question: "What are the operating principles of the show of 2016?"

Answer: After a day of discussion and a range of ideas introduced into the mix, the outcome was that:

1. **Access** to the event, physically and digitally could be controlled for our benefit
2. **Conversion** of customers both physically and digitally could be managed for our benefit
3. **Data** that will surround the entire in-person experience on the floor, at the booths, and before, during and after the actual event can be gathered and monetized in new ways. This does not exist yet.

Core insights from these two groups are that today's key concepts of "engagement", "value", and "community" are projected to evolve with increasing importance. Event "ownership", by opening an event to have the stakeholders play a larger role in its focus and design, is a newer concept that has been emerging with "crowd sourcing" technology now coming on the scene. "Ownership" gives stakeholders an incentive to participate in an event they helped design. The well-known South by Southwest (SXSW) event has been doing this to tremendous success. We need to look outside our industry for inspiration.

Data in the future can play a far larger role than it ever has; and in a far more invisible sense than ever. As a result, many more opportunities for profiting from the event experience could be leveraged by the planner and exhibitor/vendor than ever before. For example, extending brand awareness, increasing exhibitor loyalty, increasing top and bottom line results, stronger positioning in your marketplace, greater engagement, more value, etc.

Top 10 Takeaways for Updating Your Exhibits Plan

Top 10 major takeaways from this study are featured in the full report. Additionally, a companion document with insightful discussions on the top ten list is available. Excerpted below are three key ideas (of the top 10) to help you start to reimagine the future and think about building a business plan and program model for your future event.

1. DELIVER SOMETHING NEW. New forms and formats...of and within... events will need to be developed to accommodate the future novelty, education and networking needs of an event's audience and stakeholders. These new forms and formats look to be "aggressively-evolutionary" as opposed to strictly evolutionary....so the audience can adapt to them. Event Management will need to stay ahead of the changes taking place so it will have the awareness and management flexibility to design and implement the appropriate responses to meet the changing needs of the marketplace.

Examples – Figure out how to implement the newer social media function “Pinterest” now so attendees can “pin” products of interest to their account. Or, "virtualize" a piece of your next event to engage an audiences not in attendance and expand your market. Tools are available today to help you keep relevant.

8. FIND CREATIVE WAYS TO DELIVER LEADS. Leads will continue to be the exhibitors' key focus and underpinning metric. Helping exhibitors generate leads will continue to be an important part of Event Managements' job.

Example – This study revealed that leads remain a critical metric. Are you doing everything possible to help your exhibitors make connections? Are you setting appointments? Creating specialized social functions for target verticals? Actively matching buyers and sellers? Do as much as possible in this area.

9. CREATE AN EXPERIENCE THEY CAN'T GET ANYWHERE ELSE. Attendees want experiences they can't get anywhere else...or they will stay home. Delivering this will require Event Management to continue to monitor both the digital space and the competitive in-person space – inside and outside our industry - to assess what is going on and how they can create and deliver a unique experience to their own attendee universe.

Example – If your event is predictable, straight-aisle rows of 10 x 10s or even including some newer elements but has a dated feel with no surprises and the same information could be found anywhere, that spells trouble. Today, participants expect to be entertained and creating a “wow” experience they can’t get anywhere else could be the key to keeping buyers on the floor and the event healthy. What is this for your event?

Again, the complete Top 10 list is in the full report and a Top 10 Discussion Guide is available.

Key Questions to Ask to Determine if You’re on the Right Track

In assessing the scenarios of 2016, and seeking to implement new ideas designed to build a business plan to get from here to there, it is also necessary for Event Management to assess where they are now with their event and ask questions. Dozens of questions for discussion with your team are included in the full report (see especially the Assessment Metrics tables). These questions can be used at your regular team meetings to investigate and address challenges and trends; which you can then meet and improve your event. Here are some examples:

1. How compelling is your current business plan to today's marketplace and audience?
2. How far ahead does it look? Does it include digital technologies impacting your industry?
3. Does it have the appropriate assets, both financial and technical, to meet the challenges it now faces - enough to quickly respond to change and challenge?

Constant change is needed today in every industry. Some of the smartest people in the convention, exhibit and trade show space were involved in developing this insightful material designed to help you envision changes that might need to be made in the future to keep your event healthy. We believe that this exercise was useful and that the key findings outlined - when thoughtfully consumed, discussed and put into action - will help meeting and event professionals improve and advance their exhibits and tradeshows while positioning their events for long term future success.

This study was designed to make our industry think.

We encourage continued vibrant conversations by sharing and discussing these results within event teams; and across various sectors of our industry.

Extensive additional information and detail is included in the full report, including metrics for event assessment.

(End Executive Summary, begin Full Report.)

Full Report - Study Findings and Details

The ASAE Foundation, Exhibition Industry Foundation, Freeman, Gaylord Entertainment and PCMA Education Foundation joined together to fund a unique industry project to predict and plan for the future of convention exhibits and trade shows. This elite industry group believed there would be negative consequences for the future of exhibits if significant changes are not made in the way the industry currently functions.

Freeman and Gaylord Entertainment are both passionate and participative supporters of this project. "We are firmly committed to discovering the trends, ideas and solutions that will impact trade shows in the future," says Carrie Freeman Parsons, Vice Chair, Freeman. "Our obligation is to ensure the health of conventions and trade shows. This project has stimulated creative thinking and idea generation that will enhance the experience for attendees, organizers and exhibitors."

As stated by PCMA President and CEO Deborah Sexton, FASAE, "The convention exhibits and trade shows professional needs new options. In the original model, buyers had to wait 12, 24 or even 36 months to meet face-to-face with suppliers to seek out new products, solutions and innovations. Those days are long gone. Today, with the click of a few key strokes, buyers can obtain immediate answers and quotes to their queries."

"One of the things ASAE has noticed is how the digital environment brings an added dimension to the attendee experience at trade shows through different expectations about what is delivered, what platforms the experience is delivered through, and in the case of social media, the ability to share their experiences immediately," said ASAE President and CEO John H. Graham IV, CAE. "By participating in this project, ASAE is discovering how the digital environment will impact future trade shows, so that we can inform our members and allow them, and ASAE, the opportunity to plan and incorporate experiences that will enhance attendee experience and overall value."

IAEE President David DuBois, CMP, CAE underscores the importance of this project to his members, "as communications channels and society continue to evolve, it becomes more essential than ever that IAEE and its members fully understand how change may usher in new opportunities as well as new realities. One of our principle challenges is to understand how

technology may enhance the exhibition experience in the future. The 'Trade Show of the Future' is expected to yield valuable new insights that can help lead us along an imprecise path."

The sponsors of this research focused on the future and believe that one size doesn't fit all. This study has crafted five "scenarios" of the potential 2016 trade events. These scenarios have been influenced by discussions around the country with numerous industry leaders, associations, conference and trade show organizers, and others (both in-person and online) over the course of a year.

The readers of this report may align with one or more of the scenarios, or design their own hybrid, along the continuum of change and innovation presented in this report. The initial reader reaction and alignment may likely change/evolve as these scenario frameworks are better understood vs. today's and tomorrow's business environment. Scenarios the reader does not align with may be used as tools for brainstorming or innovation... or possibly to stimulate thinking more outside of the box.

The tradeshow, convention, and related industries are flooded with research that is very valuable to the work everyone in the industry is performing today. The purpose of this study was to get outside of the current context and jump forward to 2016. In order to do so, a number of techniques were used that have proven valuable in scenario planning.

Methodology

A rigorous process was followed that has involved wide ranging representation from the industry. It was critical to include a complete breadth of industry representation and to utilize a number of venues and technologies for industry professionals' involvement.

The following progression of thought was utilized to develop useful future-facing scenarios:

- Define/Refine the Question
- Define the Elements of Experience
- Explore Experiences to Organize Patterns
- Refine Patterns to Reveal Business Models
- Test Draft Structure

Define/Refine the Question

Make Live Experiences Meaningful

An in-depth discussion was held with 14 participants, many of which were not industry professionals, but rather, those who attended tradeshows and conferences. A second small select group of industry leaders were also included and participated in these discussions to gain first-hand experience with the research subjects.

The primary finding from these discussions: Do less better. Many aspects of trade shows and similar events can be replicated online. But a few crucial aspects can't be. In an age of increasingly mediated interaction, those direct connections have increased in value. In short – For trade shows and conventions to survive the coming decade, it's critical that they stay in touch with their basic reasons for existing.

Define the Elements of Experience

Designing a Meaningful Future for Conventions, Trade Shows and Events

With an extended group of 14 participants, primarily industry professionals this time, the following problem was offered to the group: What are the elements of experience that factor into the show of the future? What matters most to your audience? Your participants?

From this discussion there were insights that all agreed were showing the potential to change the face of the industry. These insights included the discovery of *four essential elements* to an exceptional and unrivaled in-person experience:

1. *It will disorient participants to make them more present* (Translation: Engagement)
2. *Be meaningful at the individual level* (Translation: Value)
3. *Enhance the identity of the attendees* (Translation: Community)
4. *Make attendees co-creators* (Translation: Ownership)

Explore Experiences to Organize Patterns

LinkedIn Discussion Group

With a total of 70 participants, a structured discussion was held to build out from the general premise developed in the first two sessions. LinkedIn was utilized because it was determined

that it was the best first place where trade show executives were willing to meet on a regular basis.

PCMA Toronto Leaders of Thought Summit

To a new set of 25 discussion participants the following problem was posed: "*What is the future of the show, and what is blocking that best-case future from happening?*"

In addition, a two-hour discussion was held which confirmed previous findings about experience design principles that were vital to building a trade show.

Broader discussions with this group covered a range of obstacles in the industry, mostly revolving around the inability of contracts and structures to keep pace with the rapid changes surrounding them. It turned out that these obstacles are being worked around by innovative, often younger trade show executives partnering with more advanced event spaces.

Refine Patterns to Reveal Business Models

PCMA Nashville Leaders' Summit

Six new industry leaders were combined with a selection of six leaders from the original group and were convened to address the following problem statement: "What are the operating principles of the trade show of 2016?"

This gathering resulted in the discovery of three core drivers underneath the experience of the future. After a day of discussion and a range of ideas introduced into the mix, the outcome was that:

- **Access** to the show, physically and digitally could be controlled for the organizers benefit
- **Conversion** of customers both physically and digitally could be managed for the organizers benefit
- **Data** that will surround the entire in-person experience: on the floor, at the booths, and before, during and after the actual show can be gathered and monetized in new ways. *This does not exist yet.*

The core insight resulting from this discussion was that a new show construct can exist. One in which data plays a far larger role than it ever has and in a far more invisible sense than ever. As a result of this finding many more opportunities for profiting from the tradeshow experience could potentially be leveraged by the planner/vendor (and on the design side) than ever before.

Test Draft Structure

First Viewing—PCMA Master Series

A meeting of 150-200 industry professionals was held and the group was asked what they believe, perception vs. reality, about the present and future of trade shows.

This group was then asked what they thought their nightmare and best case scenarios were for the future. This was not an easy assignment. The results of this discussion indicated that as a trade show or event organizer there is a need to spend much more time thinking about what is being done now and how that will look in one, three, or five years from now. Will today's approach still be appropriate or will some other approach or configuration be more appropriate and how do you get from here to there?

This session yielded group votes on seven comparative statements as follows:

1. *Majority of our vendors care or don't care about our association:* CARE
2. *Better to have 100 solid leads or 5 dates for dinner:* LEADS
3. *For vendors, trade shows are a must-have vs. trade shows are a nice-to-have:*
MUST HAVE
4. *The most important pay-off for vendors is leads or recognition/thought leadership:*
LEADS
5. *For current attendees, trade shows are a must-have vs. nice-to-have:* MUST HAVE
6. *In 2016, vendors will need us or won't need us:*
OVERWHELMINGLY THEY THINK VENDORS NEED THEM
7. *I can see the younger folks in our association as board members one day:*
MOSTLY NO

Compared to the scenarios outlined in the remainder of this document, the participants in this particular future-facing exercise indicated few problems with the current state of things and held an optimistic vision of the future. They felt a slow evolution of the current tradeshow model would suffice. That said however, the seventh point above is either a death-sentence for the current model or an indicator that the group encountered significant difficulty getting into the mind set necessary to envision a model of the future that differed much from the current status quo. If the youth in the industry—or those who need to be brought into the industry—cannot be seen by this group as the potential future leaders---then how far into the future can

these participants actually see and how resistant to change are they in preparing to actually meet the future? At one point in the past they too were the young people who have now moved into leadership roles.

Forecasting and Backcasting Business Plan Development

Part of the job of Event Management is to *forecast the future* and build business plans accordingly. The scenarios from this study however are charged with helping envision potential alternative futures "as-of" 2016. Looking back at the world of 2012 from the position of 2016 enables Event Management to *backcast from the future to the present* to gain deeper insights relative to the journey that must be taken to get an event from now to the future.

Scenario backcasting as-of 2016, and forecasting to 2016 from 2012, enables Event Management to determine if and how a business plan can be developed for one of the scenarios (or a customized hybrid scenario) that is applicable to its circumstances. Through this forecast-backcast approach, the business planning process ends up with more insights into how to conceive and build the future of an event that is better thought out than if it had not gone through this forecast-backcast planning process.

The Five Scenarios

Based upon this study, five scenarios have emerged as "most likely" outcomes in 2016. These are alternative outcomes but not necessarily individually discrete. Some features or aspects of one scenario may be applicable to another scenario, either as applied to a specific industry sector or on an evolutionary basis over time. Hybrid scenarios can also be created from these five scenarios where the hybrid may better fit an individual event's circumstances.

These scenarios are stated "as if" it is already 2016. Therefore, in evaluating each scenario it will be necessary to look at the underpinning assumption(s) that are inherent in the framework of the scenario to see if the roots of that assumption apply to a given event now; or if it will evolve into these assumptions in the near-term future (which might then make that scenario applicable to that event).

Each scenario includes justification/explanation for its existence in the form of the criteria shown below. These criteria also help explain the scenario and its conceptual dimensions in more depth.

- **Manifesto**

What is it this scenario stands for? What is the mindset of those aligned with this scenario? How might they think in general?

- **Design Principles**

What are the key elements of the scenario that should be looked at to measure or manage? How might the factors in this scenario be manipulated to make it work in our favor or toward our business advantage?

- **Risks**

What are the risks posed by this scenario to those in the industry? Who is more or less affected? What will warning signs look like?

- **Business Model Indicators**

Current and future measurements that should be utilized to monitor the progress and success of this scenario as a business model.

The five scenarios have been named as follows:

1. "The Future is Now"
2. "The Future is the Future, and We Will Build it All"
3. "Slow Walk to the Future"
4. "Show's Over (But Let's Keep Playing)"
5. "The Big Reset"

The text included in the descriptors for each scenario is designed help the reader imagine what each 2016 scenario is all about. From this description the reader can then apply his/her own industry experience and overlay his/her own event circumstances to 'flesh out' the scenarios that have the most interest/value.

The forecasting and backcasting planning approach noted above can be used to gain even further insights into how the reader can prepare to move his/her event from "now" to meet the challenges of the future. It is clear from this study, and from assessments of the larger global business environment, that standing still is not an option for the future. The questions to be addressed by Event Management include:

1. What is it that is/will change?
2. How fast will it change?
3. What is the direction of that change?
4. How does our event stay relevant and compelling in light of the change?

The scenarios presented in this study have been created by expert industry input. They, plus the forecasting-backcasting modeling approach, will enable Event Management to start the strategic thought, discussion and resource assessment processes necessary to build business plans to successfully meet the future challenges their event might face.

Scenario 1: The Future is Now

Manifesto: “We believe the future is right here.”

Because shows and events are the last bastion of face-to-face marketing, and the most convenient marketplace (i.e., everyone gathered in one place, say, one time each year), our existing model remains entirely viable. And, our staying power rests in the ability to meet face-to-face.

The most obvious obstacle for shows to overcome is recession. Our current concerns revolve around sustaining and improving the current model during the current down-turn. We continue to generate efficiencies that sustain our model, such as a more efficient show process-- everything from pipe-and-drape setups to part-time labor. In essence, we're trading people's time for money.

To know the way forward is to look to the trends of the past. Every recession ends, and we benefit. The inevitable recovery will give us all a further boost in attendance, momentum and in overall revenue.

We also know that you cannot manufacture or digitize trust. You cannot fake the power of face-to-face. And gathering once with many is far more efficient than gathering many times with a few. This is undeniable. The fact remains that shows and events are uniquely positioned for a major comeback.

Framework 1: Design Principles

Ignore the periphery: The bleeding edges--of technology, of trends other than the economy, and of the world outside of the show---are not really factors worth tending for us. So, let's focus on the *now* and move forward with what we know.

The future will happen gradually: The future of the event is not something that will sneak up on us. We are too expert to be caught off guard.

Belly-to-belly rules: As long as we meet our numbers for people in the hall, we're fine. Face-to-face gets it done, so that is our lead indicator. Nothing beats physical.

Economic recovery spells present and future success: Anticipate and design for an economic recovery. That is our second most important indicator, so we'd better assume it's just about to happen.

Youth are future adults and the same in every way: Our youth may be more tech savvy, but their underlying make-up and motivations are the same because human nature is universal. This means they will express themselves the same way as their predecessors, by showing up to events for the exact same reasons.

Scenario 1: Risks

If you believe the future of shows and events in 2016 is the same as the present, you run the risk that you:

Factor out the "unthinkable": Without the sense that you are in an era of major (and numerous) upheavals, there may be *no* reason to think about wild ideas or major risks. You utilize research to prove the past is dictated by economic recovery, and the future--where the unthinkable *lives*--is not relevant.

Stunt adaptation: Assuming the future is the present potentially slows down your response to change as it unfolds. You weren't expecting it, it's here, and you have no plan. Adaptation at this point is piecemeal rather than comprehensive.

React rather than set terms: With no plan, you react in fits and starts. Outside forces and competitors dictate a number of terms *to you* rather than collaborate *with you*.

Lose leverage: Being late to the future, you have less leverage in contending with demands placed on you by others.

Scenario 1: Business Model Indicators

Based on the scenario outlined here, current and future measures that should be utilized to monitor the progress and success of your event include those shown in the chart below.

Assessment Metrics

| Metric | Measure(s) | Trend(s) | Ask Yourself |
|--------------------------|--|--|--|
| Economic Trends | GDP, Stock Indices, etc. | Up/Down | If the economy is a core indicator, which direction is it moving and when will it turn. Your event will trend with it. |
| Replenished Demographics | Average age, alignment of thinking across demographics | Average up/down; aligned together/not | Are younger people joining your industry, event, leadership? If so, are they in-line with the current vision or on a track to understand it...or are they different? |
| Stability of Change | Technologies introduced, product/service turnover | Pace of change and your adaptation to it | Is change moving at a pace that fits your vision of the future? Are you accurately predicting its direction and movement? |
| Predictability of Change | Small bets (document predictions about next year's show) | Accuracy | Are you accurately predicting what is happening or are you surprised more and more often? |
| Relevance of Convenience | Third-party measures of attendee satisfaction | Audience disposition | Are people who attend the event truly finding it to be the most efficient and effective method for achieving their goals? Do they reveal any hints of other options they might explore? |
| Rate of Change | Technologies introduced, impact of introductions | Velocity and direction of change | Is the pace of change moving in a linear fashion or is each change exponentially charging the next so that the window for prediction is effectively closing in on you making your assumptions invalid? You're too late to respond appropriately? |

Scenario 2: The Future is the Future, and We Will Build It All

Manifesto: “The future is entirely different than the present (and the past)”

The digital side of 2016 is so disruptive that we have to build a new world for shows and events to protect our future. We are world-builders. And we believe that the future is so entirely new, so fundamentally digital, that the event of 2016 must be its own, self-contained, world.

It will be built-to-suit by professionals in the industry who know how to create great immersive experiences that are also highly digital. It will do this while also building a level of security and knowledge for exhibitors and attendees not seen before. *Our model may be the same as today, as long as we can express and control that model digitally as well.*

To prepare for this future, we are beginning to close the event off from *digital* incursions by anyone who is not a partner or is outside our sphere of influence (Google, Quickbooks, anyone with a lot of information about our customers). These include steps such as halting free wifi, building private new data models and networks to capitalize off of access to attendees and exhibitors, and tracking the story of every inch of the show floor to optimize the experience. Outside the few days of any event, both before and after the event... you are still in the event.

Events of 2016 will be alive with relevant information and technology to provide every person there the best experience possible. We will build the future from the ground-up, and retain control of the digital side as well.

The idea is ***not*** to

- Use digital to rope more people into the experience.
- Use digital to engage people who aren't there.
- Use digital to pump our live experiences out to more people.

Scenario 2: Design Principles

In this future, the web has so eroded the value of events--and technology has become so cheap and abundant--that organizers and exhibitors have found a way to create their own standalone digital experience, their own web, their own digital booth and their own transaction/currency system (both kinds: financial and social).

Everything--from booth interactions to purchases--is controlled by the "event" or some service that builds the world of the event from the bottom-up for the organizer. We use digital to create an unbelievable live experience contained in a specific physical location.

Digital-physical booth experiences as efficient as pipe-and-drape: We can do this because the downward pressure of price performance in digital tells us screens will be cheap and plentiful, as will every other type of technology that we used to consider life-threatening to us.

Tools tell the story of each participant: A closed network keeps competitors from seizing market share from our event. Digital concierge service for every participant efficiently serves their needs, interests and potential purchases. Floors are digitized to see where people stop, stand and transact business. RFID tags track key points in the experience. Marketing models for all of the related data in that experience are built and maintained as a primary value-added service for providers and participants in the event.

Information wants to be expensive (and private): High quality information is the new engine of your event, the single thing that provides the most experiential and monetary value. And you guarantee your customer the privacy they now demand.

Control is key: You control the entire design and execution of the experience. Every inch of the event floor is digital. You know the transactions, you know who is where when, and you know how both exhibitors and attendee participate through the event.

Longer-range deals: You--the world builder--create contracts for floor space for more years/longer terms to allay the fears of your exhibitors. Namely, that booth costs will go up next year because you can track the total value of their transactions with attendees and then monetize that data for exhibitors into your booth prices.

Forget partners: Visa is out. Google is out. The only partners you are looking for are: a) one genius software coding team and, b) the right hardware to operate with.

Data, data, data: Your value lies in the data you now broker with every person at the show. You create essential rules to govern data brokerage and act accordingly.

Scenario 2: Risks

If you believe the future of shows and events is radically different than today, and that events should close-off their operations to prevent digital disruption, you may have to deal with the following:

Information wants to be free: Participants rebel against the idea of one creator holding the keys to their world. Privacy issues abound as you are labeled the next Mark Zuckerberg--pretending to honor privacy rules while consistently brokering data in ways that make serious segments of your market uncomfortable.

The future is all about losing control: In turn, events let go of controlling the future and hand more and more responsibility over to a range of digital partners (not you!). Events adapt to pressure from all participants to have a diverse, open set of solutions to participants' digital needs, hoping that diversity will force competitors to promise more in terms of personal privacy.

People, people, people: You obsess over technology as the only factor and forget the importance of the human experience. While you prize the value of exceptional data, the participant decides that your design is intended to harvest information, not provide the greatest value to them at your event, and they balk at this.

Building the wrong future: You neglected signs and milestones warning you of wrong turns in your plans. Your core team building this new digital world turns out to have gone in the wrong direction. You are now stuck with an inferior product as a competitor with better vision--and listening skills--swooped in to take the lion's share of the marketplace.

Scenario 2: Business Model Indicators

Based on the scenario outlined here, current and future measures that should be utilized to monitor the progress and success of your event include those shown in the chart below.

Assessment Metrics

| Metric | Measure(s) | Trend(s) | Ask Yourself |
|-----------------------|---|---|--|
| Technology Benchmarks | Current measures accumulating over time | Relevance of benchmarks and their directional changes | If you were to predict technological or other advancements in your event, compared to where you are today, can you understand what's coming? Are meaningful technology improvements on the horizon that you can make sense of in your context? |
| Privacy | Pace of erosion or strengthening of privacy concerns / issues | Societal and/or business acceptance | Is privacy moving in the right direction for your business goals? Are you in line with people's personal expectations or with the expectations of business? Are you charting new ground with data acquisition or sharing? |
| Exhibitor Support | Volume of exhibitors capable of supporting your mission | Exhibitor growth or attrition from your enterprise | Are exhibitors arriving who can service your vision of the future show? Are they competent insiders with an understanding of the implications of your business decisions? |
| Ecosystem | Volume of measures and interconnectedness of those data capture systems | Volume and connectivity | Is a digital ecosystem forming (or are you creating one) that you can wall-in and control? Do we need to use another vendor's or business's ecosystem in order to service your vision? |
| Long-Tail | Engagement during walk-up to, or Walk-away from, your event | Engagement over time outside the physical event | Are your events thriving outside of their in-person dates? Do forums, idea sharing, planning, or other online activities pre-date or outlive the event in meaningful ways? Has an exhibitor popped up to support this interest? |

Scenario 3: Slow Walk to the Future

Manifesto: "Gradual changes in energy, the economy and technology dictate our world."

Change is a slow march, and our show builds toward the future by gradually meeting it. Because so much change lies on the horizon, we must find the right partners--and new partners--at every level. We can't build the future, but we can build toward it.

We demand a new relationship with exhibitors. If that does not happen we will be totally irrelevant to them, and they to us. Coming soon will be deeply customized experiences for participants (exhibitors and anyone at our event/s). This will be one of several ways we continue to delight and cultivate our audience.

There are four main concerns we have about building the 2016 future:

1. **Digital:** We must have digital partners who provide firepower in terms of cutting edge, relevant products and data models (for show organizers and participants), *and* who work with--rather than against--our interests.
2. **Financial:** We will explore new financial and revenue models.
3. **"Experience" partners:** We will find exceptional partners to provide the missing-piece of the current show "experience".
4. **Transparency:** All of this must be done in an open environment, where information flows freely (Google, Visa and Twitter are of course welcome) and the attendees and exhibitors not only come together, but also enjoy a complete experience the likes of which they cannot find today and could not experience in a completely contained show.

Scenario 3: Design Principles

You are convinced that the future is *not* the present, but you're not in a big hurry to get there. You believe some work will be done, some transactions made at the show, but you also must have a larger entertainment or educational component. You're sure that there is time enough to "adopt, adapt and improve". That said, you're also looking for partners in digital to avoid further (major) erosions in your marketplace.

Here are a few design principles to live by:

Pace yourself: Going at a steady pace means you operate from a position of strength. In seeking out digital partners you'll look to see both who has the upper hand over the long term as a service provider and who is diplomatic enough to work in tandem with you (rather than aggressively at odds with you).

Invent the models of the future: You will build the models of the future and then find the right partners to experiment with and fill those models (financial, technological and otherwise).

Be transparent in everything you do: Through openness you will have the decided advantage over anyone who is building a closed system because you will be able to iterate faster, offer services more cheaply and assemble models at a faster pace.

You U: Your education component must be so exceptional that it rivals the best in class (or exceeds it!)

Experience rules: To keep your exhibitors and attendees happy, you must focus as much on the experience/entertainment component as you do on the rest of the event.

Scenario 3: Risks

You're toast? Possibly: By accepting change as a very gradual occurrence, you expose yourself to competitors who do not hold your worldview. You're the tortoise, they are the hare.

Bleeding-edge risk: You may have to move faster than you originally thought in order to make necessary changes. By plodding along you keep your ideas long after they need serious updating due to the bleeding edge technology incursions into your marketplace.

Openness strikes back: You attract allies (maybe too many allies) through being open with your ideas and plans; and your competitors skip ahead of you due to their quiet, cunning ways.

Scenario 3: Business Model Indicators

Based on the scenario outlined here, current and future measures that should be utilized to monitor the progress and success of your event include those shown in the chart below.

Assessment Metrics

| Metric | Measure(s) | Trend(s) | Ask Yourself |
|---------------------|--|---|--|
| Linear Progression | Predictable evolution year-over-year...as opposed to non-linear interruptive progression | Accuracy and effectiveness of the trend projections | Are your moves from one event to the next linear, predictable? Are the adjustments you make having predictable impacts on your performance? Do incremental changes add up to meaningful outcomes? |
| Iterative Testing | Comparative models and pace of comparison. Requires assessing current model for its continuing relevancy | Accuracy of outcome and volume of tests | Are the tests you are performing on an iterative basis happening quickly enough or with enough volume to know you can head off a major change before the market shifts? |
| Leadership Position | Delivering outstanding education and maintaining leadership perception | Holding or improving | By regular measurement/survey, does the community see you as a core thought leader and expert throughout the year and across multiple channels/platforms? |
| Focus of Experience | Narrow vs. broad audiences; and audience interests or influence sets | Refining, narrowing, or shifting your focus | Have you revamped your event experience to create shared, meaningful experiences? Are you reliant on any data points from historical data sets that need to be re-thought into a more narrow focus to make the new iteration even more effective? |
| Transparency | Incorporating audience insight and understanding in a two way dialog between organizer and audience | Deepening stakeholder connections with the event | Is transparency leading to actual dialog and new innovations between you and your attendees/exhibitors? Are these interactions able to happen outside traditional event dates and to some degree still on your terms? Do you listen and implement? |

Scenario 4: Show's Over (But Let's Keep Playing)

Manifesto: "Many associations are tiptoeing on the verge of irrelevance."

The pace of technological change demands we do more than shift our attitude and adjust our strategy, and time is the scarcest commodity of all. Both demand we completely rethink who we are.

Our size has made us more efficient, but the slowness of our approach is life-threatening. We are now so large that we cannot keep pace with the changes around us to remain relevant. This means more than irrelevance: *it means the end of our event by 2016*. The future is a relationship with our exhibitors *in an entirely new context*. Again, we must **not** be a trade show any longer.

We must find compelling financial and experience models for exhibitors or build a new model and change our relationship with them for the better. *Nimble, holistic and quick* are the three key adjectives to describe our new model.

We will condense the relationship between the exhibitor and attendee to provide serious financial value back to the exhibitor. This new model may well be open to marketing to anyone, not just association members, with a focus on marketing to those with overlapping interests with our exhibitors. This new model must be so remarkable and so unique that we can see 2016 and beyond clearly once it is established.

This event exposes us to an entirely new audience, and our exhibitors are able to capitalize on relationships in a more relaxed setting. There isn't the sense that the pressure is on to sell, sell, sell and buy, buy, buy. It's a party where a sliver of business happens to get done.

By re-imagining who we are, we intend to move from "big" to "fast" and take our exhibitors with us.

Scenario 4: Design Principles

In this scenario your trade show as you know it is gone but you keep your relationships with exhibitors. Together you create something new and it's not a show. What it is remains to be seen.

Consider these design principles:

Focus on being fast (not on being big): Those with huge events are less likely to adapt. If you move faster, you will naturally have to scale down.

Same exhibitors, new audience: Who have you overlooked as an audience--or better yet never considered--because you felt they were unattainable? Depending on how your offer changes due to scaling-down (or scaling different), you may have a brand new audience you had never considered before.

Natural efficiencies create natural value: If the show is dead, you can do whatever you want. Consider scaling back. For example, by scaling back an event to 700 attendees from 3,000. Look for a more upscale audience where you are potentially able to offer more value. You could potentially create each show as a new experience. And you can **create more and shared experiences** because everyone can be at the same events, and those events can be far more tailored to a smaller group.

Scenario 4: Risks

Here are three risks assumed by committing to Framework 4 (Show's Over):

Bigger was better: Your show was best when it was big, because big attracted the right mix of people.

Lose your audience, lose your exhibitors: By electing to seek out a new audience of attendees, you have traded in loyalty for further profitability (or faster, smaller scale). In turn, *no* audience joins your cause and you are left with little to no new attendees.

Efficiency is for robots. Face-to-face is messy and profitable, and "lots of people present" is fine: You commit to scaling down the show, but the fact is that there is always some messiness to your industry. Scaling back harms that delicate balance that brings you a profitable show, whether it's a mystery how it happens or not! And your show wasn't about "shared experience". Instead, it's really about the serendipity of large numbers of folks convening and you can't replace that with a reduced-size show.

Scenario 4: Business Model Indicators

Based on the scenario outlined here, current and future measures that should be utilized to monitor the progress and success of your event include those shown in the chart below.

Assessment Metrics

| Metric | Measure(s) | Trend(s) | Ask Yourself |
|-------------------------|--|---------------------|--|
| Fast vs. Slow | Efficiency of change, rate and pace of change | More nimble | Are you able to react to new audience needs or business trends? Does your efficiency reveal relevance you'd missed previously and are you learning from it? |
| Lean vs. Fat | Ability to edit, try new ideas and keep-toss new ideas quickly | More nimble | Do you have the stomach for change? Have you trimmed where you know the show might be becoming trivial? |
| Holistic Change | Appetite for and effectiveness of major shifts in the business environment or in your stakeholders needs, wants, desires | Show transformation | Do you have a comprehensive plan to revamp, rather than piecemeal, to win? Are you hitting your targets when you set out to do so? If not, are you making substantive changes in order to be more accurate next time? |
| Past standard practices | Erase and replace | Overhaul it | Are there measurements built into the new model ensuring you don't go back to old habits? Have you cut some things that require reintroduction? Can you reintroduce elements without losing focus on the new leaner model? |
| Exhibitor Relations | Survey and show experience | Speed-to-adapt | By survey and show experience, are exhibitors being heard and adapted to rapidly? Are you doing so with discipline? Are you avoiding death-by-committee hang-ups? |

Scenario 5: The Big Reset

Manifesto: “We are committed to reinventing our show from whole cloth.”

Let's not even call it "re-inventing." We are building new ideas from the bottom-up. It's a brand new experience never seen before. We imagine it as the Olympics of our industry.

Top thinkers and executives select the best products and ideas from our vertical market to be showcased at the event. There is a strong entertainment or “public-oriented” component that has “nothing” to do with our former exhibitors. No business (not direct B2B anyway) will be done here. (A “juried event”?)

Instead, we will promote our world and raise awareness about the best-performing products and services. In the process we will educate the public about the value of what we do. That's our goal. That's it. Oh, and turning a serious profit.

We may also sell serious ownership to a partner to operate and manage the event, and enjoy the revenue stream (without the hassle).

Scenario 5: Design Principles

In this framework, your show is over, your attendees are out and your exhibitors are gone. You still have this essence of what was an event, but now you're on the hunt for an entirely new audience and partners.

The gigantic advantage? There is no precedent to rely on or hold you back. You have a clean slate and a chance to really aim at a great idea. What do you do?

Here are several proposed starter principles.

Little Bets: Experiment your way into the future with a number of small bets and small risks, rather than one *Big Idea*. The more small risks you can take at once, the more likely you are to run into some exceptional ideas for how to evolve the future of your... "gathering".

Blue-sky: The world is yours, so act accordingly. Design from scratch and take big risks. Enjoin partners you have always wanted, rather than relying on the tired old formulas of the past fifty-odd years.

Sharp decisions: Be a dreamer, but be decisive.

Startup mentality: Be as lean as possible for as long as possible. Experiment with your model in your market. Test it until you have something truly mastered and then think about scaling.

Stick to it, iteratively: Don't run off trying to flip the profit on your idea like someone would flip a house. Don't over-expose yourself to heavy risk early-on. Instead, rely on several key partners to build this idea into a powerhouse.

Scenario 5: Risks

There are plenty of risks simply blowing up your event once and for all. That aside, what do you risk by truly believing that the future is so radically different by 2016 that you get rid of your event?

No big ideas: Doubling down on multiple, smaller risks may mean you lose the grand vision needed to build this future. Too much time spent on experimentation, not enough time spent on the core solution.

Reality: Reality is always a risk. Dreamers dream and create some of the best ideas. They also risk a lot for those ideas. But reality is also the best testing ground once you have a concrete idea you need to test.

Sharp mistakes: You're decisive, but your strength in that area exposes you to making grand decisions down the wrong path; which then makes it incredibly hard to course-correct.

Spending too much money to make too little: The startup mentality is great, but make sure it's balanced with the right type of growth at the correct moments in time. It's equal parts art and science, no easy task, especially in this economic climate.

Scenario 5: Business Model Indicators

Based on the scenario outlined here, current and future measures that should be utilized to monitor the progress and success of your event include those shown in the chart below.

Assessment Metrics

| Metric | Measure(s) | Trend(s) | Ask Yourself |
|-------------------------|---|--|---|
| Mergers and Acquisition | Appetite for major integrations or divestitures | Major shifts | Do you have the indicators in place to know when you see a good fit for a major new relationship? Are you setup to measure it efficiently and make a decision that is both mature and expedient? Do you know the right people when you see them and are you judging them on the right criteria? |
| Lean Stance | Start-up mentality and practices | Stripping the pretense | Is your event beginning to act as a startup? Are you experimenting on the "public" stage? Do you have the intelligence, strength, and bravery to improvise in front of the crowd? When you do so, does your audience understand that you're not behaving oddly, but in their best interest? |
| New Audience | Value of audience (influence, impact, or financial strength) | Swap, acquire, or refine | Have you developed indicators to identify new audience relationships? Are you actively seeking them out? Do you consider entirely new categories on a regular basis, just to keep your thinking nimble? |
| Long Tail | Engagement outside of physical dates | Ability to port the event where the audience goes on a 365 day basis | Where is your event the other '362' days of the year? Is it happening online or in smaller venues? If not, should it be? If your audience were to show up in small groups in diverse places, could you meet them there easily and coordinate efforts among them to show yourself as relevant? |
| Audience Reflection | Tone-test, resonance of your event to their needs, wants, desires | Keeping your audience in the boat | Once you have a revamped audience, have you outlined the indicators you understand to be most meaningful to them? Can you match a new experience to their core needs? Do you have nimble research and implementation methods in place to ensure you stay in line with their evolution? |

Major Take-Aways From This Study in Building Your Business Plan For The Future

Major take-aways from this study in thinking about building a business plan for the future of your event include the following:

1. **BE RELEVANT NOW.** The more relevant your event is to its industry today, and the faster you can respond to change, the less likely it will be necessary to blow up your event and start over with something new
2. **TRANSLATE YOUR RESEARCH INTO ACTION.** Market research and industry economic research will play an increasing role for the Event Team in the development and execution of an event. In building your future business plans it will be necessary to review how you are using market research today and what must be done to increase its depth and predictive accuracy in building your plans for tomorrow.
3. **STAY ON DIGITAL ALERT AND IMPLEMENT TECHNOLOGY.** The rate of digital penetration in your industry will dictate how aggressive an event must be to incorporate new technology into its design and execution. The important point from this study is that the Event Team must be on "early-alert" to the changes taking place in its market-space and competitive environment, correctly assess those changes, and then implement an appropriate response to defend its event or even increase its competitive position in that market-space.
4. **DATA, DATA, DATA.** Data, about everything that goes on/in/at an event, will become increasingly more important as guides to the successful design and execution of an event for exhibitors, attendees and organizers. Therefore, a data collection system and protocol analysis will need to be undertaken now by an Event Team in order to determine what kind of system needs to be designed and implemented as part of the event production process in the future. Included in this analysis should be a look at how the collected data will be analyzed, utilized as part of the decision making process and how it can potentially be monetized.
5. **DETERMINE WHAT YOU NEED AND PLAN FOR IT.** As part of today's event planning process it will be necessary to do a capabilities audit to determine if the appropriate "digital" and "experiential" horse-power is on-staff and able to successfully meet future challenges. If these capabilities need to be outsourced, it will be necessary to search for and develop external expertise and vendor partners, you can trust, to get your capabilities in-place and positioned to quickly respond to future challenges.

6. **BE FLEXIBLE AND MAKE CHANGES**. Not getting stuck in "what-is", having flexibility in thinking, and adopting new approaches in looking to the future will be an important Event Management characteristic going forward.
7. **DELIVER SOMETHING NEW**. New forms and formats...of and within... events will need to be developed to accommodate the future novelty, education and networking needs of a given event's audience and stakeholders. These new forms and formats look to be "aggressively-evolutionary" as opposed to strictly revolutionary....so the audience can adapt to them. As noted in #5 and #6 above, Event Management will need to stay ahead of the changes taking place so it will have the awareness and management flexibility to design and implement the appropriate responses to meet the changing needs of the marketplace.
8. **FIND CREATIVE WAYS TO DELIVER LEADS**. Leads will continue to be the exhibitors' key focus and underpinning metric. Helping exhibitors generate leads will continue to be an important part of Event Managements' job.
9. **CREATE AN EXPERIENCE THEY CAN'T GET ANYWHERE ELSE**. Attendees want experiences they can't get anywhere else...or they will stay home. Delivering this will require Event Management to continue to monitor both the digital space and the competitive in-person space to assess what is going on and how they can deliver a unique experience their own attendee universe will want to have.
10. **STAY FOCUSED**. In short – For trade shows and conventions to survive the coming decade, it's critical that they stay in touch with their basic reasons for existing.

In assessing the scenarios of 2016, and seeking to build a business plan to get from here to there, it is also necessary for Event Management to assess where they are "now" with their event and ask the following questions (among others):

1. What is the business plan that is in place now?
2. How compelling is this plan to the current marketplace and current target audience?
3. How far ahead does it look and does it include digital technologies impacting our industry and event?
4. Does it have the appropriate assets, both financial and technical, to meet the challenges it now faces?
5. Are the budgeting and decision making processes clearly laid out and flexible/fast-enough to respond to change and challenge?

Building business plans to get from "now" to 2016 requires a firm understanding of where "now" is for a given event. Understanding where "now" is makes it much easier to assess the various 2016 scenarios, or build new hybrid scenarios, that enable an event to successfully meet the challenges of 2016.

With the five scenarios presented "as-if" it is already 2016, Event Management can look back, or "backcast", from 2016 to 2012 and also think about how it got from 2012 to 2016. In building a forward going business plan Event Management can use a combination of "backcasting" from 2016 and "forecasting" from 2012 to build a business plan that is more comprehensive than if it relied only on a forecasting approach.

In the larger business environment we are seeing major game changers being introduced that will profoundly affect the period of now through 2016. Microsoft is introducing Windows 8 which is graphically based and designed to run and integrate on all "device platforms". These platforms include phones, touch pads and computers. Microsoft has launched its own touch pad device to compete with the apple iPad as well as its own iPhone operating system.

The continuing rush of Social Media capabilities, free "content" as a major feature in today's marketing mix, and integrated "device" platform formatting (i.e. computers, phones, touch pads) mean that non-event competition is actively courting and selling event target audiences on a 24/7/365 basis. This high level of media-driven interaction means some or all of an event's target audience needs are being met outside of the event and as a result these potential attendees or exhibitors may feel they do not need to attend the event.

Keeping an event relevant over time also means researching and understanding the changes in technology surrounding the larger business marketplace and how these technologies are being used by exhibitors and attendees. These understandings will enable event management to make the right changes in their event at the right time and for the right reasons. Tracking changes in technology and the new social media introductions will require a necessary "external environment scan" as part of the on-going event research noted above.

This highly interactive and aggressive business environment mandates an appropriate competitive response from tradeshows and events in order for these in-person activities to

survive and thrive. Appropriate business planning, and the forecasting-backcasting scenario development noted in this report, are tools to assist event management to build and implement an event plan that is compelling, successfully meets the challenges of the marketplace, and brings people to attend face-to-face events.

Since no one size fits all, the you and your team are encouraged to review, digest and communicate about the scenarios presented in this report as they apply to your event. It may be necessary to create a "hybrid scenario" that is more appropriate to the your circumstances. From this hybrid scenario, you can then utilize the forecasting-backcasting approach outlined above to create a business plan that better targets your event needs.

This study investigation of how convention exhibits and trade shows may change in the future is designed to help you determine where you are now; and to assess what impact future changes might/will have on your long term, sustained event success. Investigate. Think. Adapt. Change. Use the results of this investigation to help you and your team position your event to remain relevant, competitive and highly sought after well into the future.

The bottom line from this investigation is...**Standing still is not an option.**

This study was conducted and presented by

**The ASAE Foundation, Exhibition Industry Foundation, Freeman, Gaylord
Entertainment and PCMA Education Foundation**