

Select The Right Partner To Drive Superior Digital And Hybrid Events Experiences

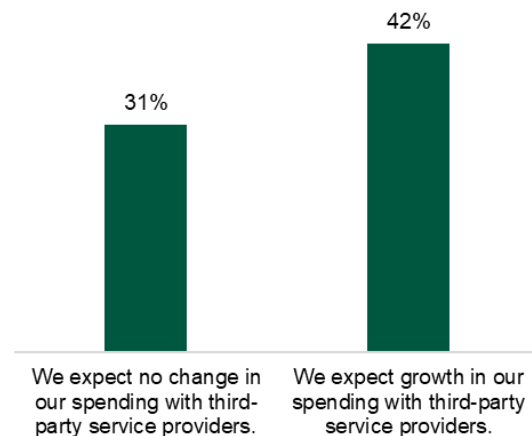
As the pandemic began in 2020, event teams quickly found themselves needing to shift to a digital-only delivery model, enabling their organizations to stay connected to customers, colleagues, and partners. At the same time, many were forced to confront the shortcomings of their digital skill sets.¹ Moving forward, events teams will need to expand their use of digital capabilities to maximize the effectiveness of events, including traditionally offline events. To do so, events leaders need to inventory their in-house capabilities and identify qualified partners to fill gaps.

NTT's Cloud Communications division commissioned Forrester Consulting to explore the state of digital events delivery, including the role of third-party partners and what organizations expect from them. In March 2021, Forrester conducted an online survey of 474 senior events decision-makers at enterprise organizations in North America, EMEA, and APAC. Our survey found that, despite learnings from the past 18 months, events teams still experience significant challenges in leveraging technology to deliver attendee-focused meetings and events and that an increasing number look to third-party partners for support.

More than 80% of surveyed event decision-makers currently engage third-party service providers at least occasionally to support the design, execution, and production of meetings and events. Looking ahead, events leaders only expect their reliance on third-party partners to grow. More than 70% of decision-makers plan to maintain or increase their reliance on third-party service providers once the COVID-19 pandemic no longer represents a threat and hybrid events become the norm.

Figure 1

Anticipated post-pandemic spending on third-party service providers



Base: 474 senior event services and technology decision-makers
 Source: A commissioned study conducted by Forrester Consulting on behalf of NTT Cloud Communications, March 2021

However, events teams may struggle to identify a partner capable of supporting the full range of events and experiences required to effectively engage attendees.² Today's event technology marketplace is rapidly evolving with new providers appearing on a near daily basis. While this means that events teams now have more technology choices than ever, few providers offer comprehensive solutions.³

LEVERAGE PARTNER SUPPORT TO ADDRESS EVENT TECHNOLOGY CHALLENGES

Despite significant learnings from the recent surge in digital events, event-management practices lack technological sophistication, owing in large part to: 1) vendors that offer incomplete technology solutions and 2) ongoing reliance on a disconnected set of

systems to power event delivery.⁴ Partners can fill critical gaps, but events leaders should assess each vendor’s ability to address challenges specific to their organizations and event programs.

Our survey showed that inconsistent performance of technology platforms used to support digital events ranks highest among the challenges for events teams. Sixty percent of senior event decision-makers report technology performance issues pose a challenge to delivering high-quality digital events. Yet, event teams also struggle with many of the foundational elements of digital event delivery, including audio, video, and content production. And, despite significant learnings from the pandemic-era, many are still searching for ways to better engage attendees.

While many event teams will look to partners for solutions, they will bring a set of strict criteria to the partner-selection process. Unsurprisingly, partners’ ability to secure business-critical information ranks highest among priorities for event decision-makers. However, event teams also value a technology-agnostic approach that lets them work across multiple video and event software solutions, including the ones their organization already owns.

- Up to 86% of senior event decision-makers report that a vendor’s ability to secure business-critical information shared during events is among the most important criteria they use when selecting a partner.
- Meanwhile, 78% report that the ability to work with multiple video and event software solutions is “Important” or “Very important” when selecting a third-party partner.

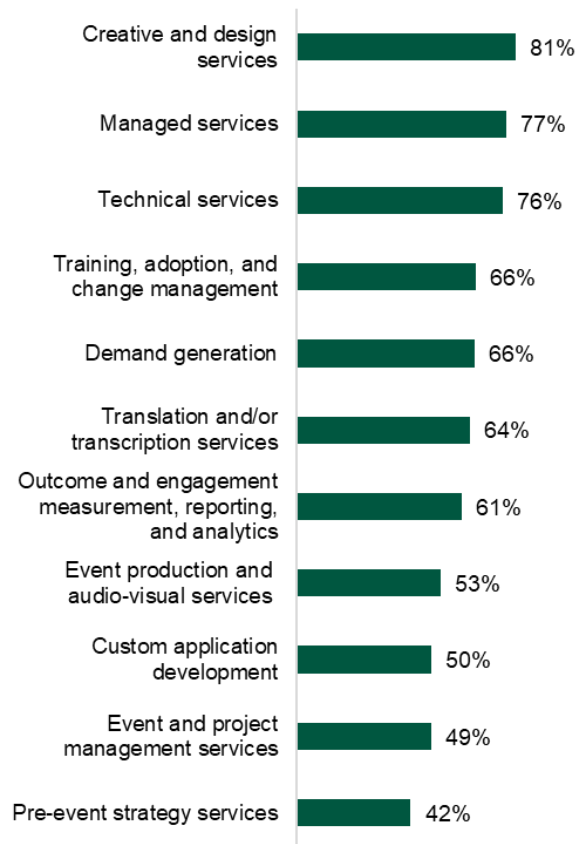
Importantly, partners should also support the range of technologies that event teams rely on. Audio and video conferencing technologies are linchpins for event teams with 81% and 77% adoption, respectively. However, event teams also rely heavily

on a broader set of technology solutions to engage attendees, scale events, and manage content:

- Sixty-six percent of respondents’ organizations use virtual event platforms to interact with and engage attendees at scale.
- Fifty-eight percent of respondents’ organizations use video content management systems to store, manage, and stream video content before and after events.
- Up to 42% of respondents’ organizations use event management software to manage, automate, and scale events.

Figure 2

“Once COVID-19 is no longer a threat, do you expect the need for these services to increase or decrease?”



Base: Variable ranging from 88 to 235 senior event services and technology decision-makers
 Source: A commissioned study conducted by Forrester Consulting on behalf of NTT Cloud Communications, March 2021

EXPECT SUPPORT ACROSS THE FULL EVENT LIFE CYCLE

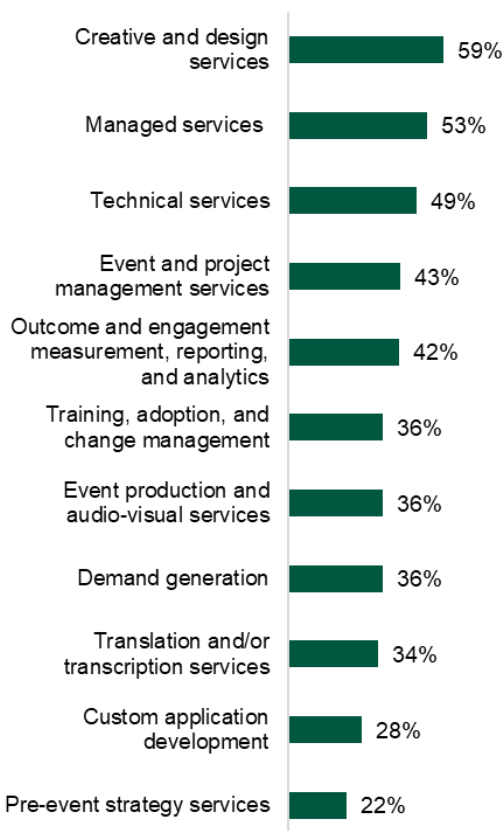
For many organizations, event technology software represents a starting point for delivering attendee-focused events — but software alone is insufficient. Our survey showed that event teams seek support from third parties across the full event lifecycle from strategic planning and project management to analytics and optimization. These organizations use third-party vendors to:

- **Consult and recommend.** To uplevel their end-to-end approach to digital, in-person, and hybrid events, more than one-fifth of organizations seek out providers who offer strategic advisory and consulting engagements. Post-pandemic, many respondents (42%) plan to increase their reliance on strategic partners to maximize their events' budgets.
- **Build and deploy.** Events are more technically complex than ever, requiring seamless integrations across registration and ticketing, mobile apps, and activity analysis applications, among others.⁵ To manage this complexity, business event teams look to third parties for assistance to build and deploy an event technology stack capable of supporting a compelling attendee experience. Notably, they also frequently seek expert support in developing content that visually engages and delights attendees.
 - Up to 50% of event decision-makers say that their organizations engage third parties to provide technical services. Once the COVID-19 pandemic is no longer a threat and hybrid events become the norm, 76% of decision-makers say that their organizations plan to increase spending on these services.

- Nearly 35% of respondents look to partners for custom application development services to ensure their organizations' event technology stacks are capable of supporting attendee-focused experiences. Post-pandemic, more than half of these respondents report their organizations expect to increase investments in custom application development services.
- Nearly 60% of respondents report that their organizations regularly enlist

Figure 3

“In which of the following areas do third-party service providers support the design, production, and execution of your department or business unit’s meetings and events?”



Base: 400 senior event services and technology decision-makers
 Source: A commissioned study conducted by Forrester Consulting on behalf of NTT Cloud Communications, March 2021

partners for creative and design support. Over 80% of those respondents expect their organizations to invest in this category of partner services to increase in the post-pandemic world.

- **Onboard and train.** A successful event requires seamless interactions among attendees, speakers, partners, and staff. To make sure all parties are equipped with the information they need, when they need it, event teams look to partners for support with onboarding and training. Up to 36% of decision-makers currently seek this type of support for partners today, but roughly two-thirds expect to increase spending once the pandemic ends.
- **Manage and run.** In high-stakes scenarios, event teams seek out end-to-end managed services support to ensure that events run seamlessly. Today, 53% of decision-makers enlist providers at least occasionally to fully manage their events. Up to 77% of respondents expect their organizations' spending on this category of services to increase in the post-pandemic era.
- **Optimize and refine.** Digital event technology makes it easier for event teams to collect data about attendees' actions and preferences, enable stronger post-event follow-ups, and accelerate time-to-insight. Today, up to 42% of decision-makers' organizations seek support from third-party partners to leverage data-driven insights to optimize and refine events. Looking ahead, more than 60% of organizations expect to see their organizations' investments in this area increase.

EVALUATE PARTNERS' SELF-SERVICE OPTIONS FOR HIGHER-FREQUENCY, LOWER-PROFILE EVENTS

Not every event will require end-to-end support from a third-party partner, and event teams expect partners to equip them with self-service capabilities. Fully managed services ensure seamless attendee

experiences in high-stakes situations. However, for higher-frequency, lower-profile events, event teams will seek self-service options to quickly stand up and deliver high-quality digital and hybrid events.

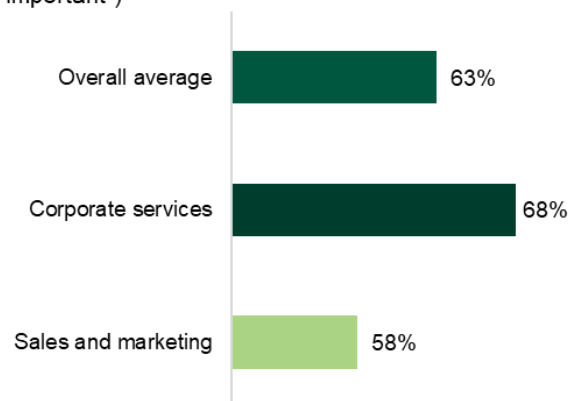
In particular, self-service options are important for corporate services event teams, who are frequently tasked with enabling company announcements, corporate trainings, and team all-hands meetings.

- Up to 63% of senior event services and technology decision-makers report that developing in-house, self-service digital event capabilities will be "Important" or "Very important."
- The importance of self-service capabilities varies based on where in the organization event teams sit. Approximately 68% of surveyed corporate services event planners report that developing self-service capabilities will be "Important" or "Very important" over the next 12 months versus

Figure 4

"How important will the development of in-house, self-service digital event capabilities be for your department or business unit over the next 12 months?"

(Showing "Important" and "Very important")



Base: 417 senior event services and technology decision-makers
 Source: A commissioned study conducted by Forrester Consulting on behalf of NTT Cloud Communications, March 2021

just 58% of event planners focused on sales and marketing.

ENSURE THAT PARTNERS ARE EQUIPPED TO DELIVER SEAMLESS HYBRID EVENTS

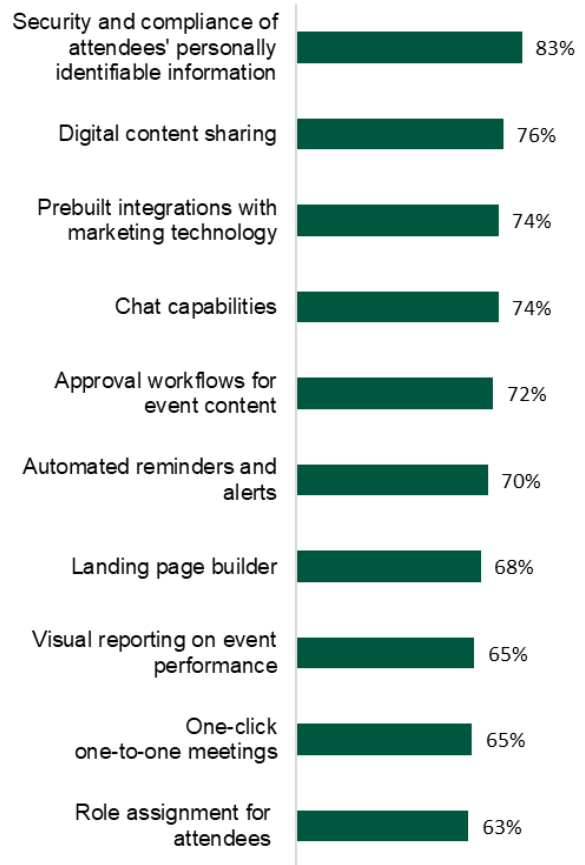
Once social distancing restrictions ease, events leaders expect hybrid events, which include attendees in both physical and digital venues, to become the norm. Once again, senior events services and technology decision-makers report that they will look to partners for help in executing hybrid events. A partner’s ability to set up, manage, and scale hybrid events that span global audiences, time zones, and multiple languages will be a key requirement for event teams.⁶ Additionally, our survey showed that:

- Partners will need to support the full range of events that organizations plan to deliver in hybrid formats, and each event type will come with unique requirements and challenges.
 - Up to 72% of corporate services decision-makers say that their organizations will host team all-hands meetings in digital and hybrid formats post-pandemic. Board meetings and corporate trainings are close behind with 71% and 67% of decision-makers saying they’ll hold these events in digital or hybrid formats even after the pandemic ends.
 - Approximately 75% of marketing event decision-makers say that community and partner events such as fundraisers, developer summits, product launches, and advisory board meetings will be delivered in digital or hybrid formats.
- Events decision-makers also expect partners to integrate or facilitate integrations across the set of technology solutions that will enable hybrid events.
 - Seventy-four percent of senior event decision-makers report that prebuilt

integrations with marketing technology solutions is “Important” or “Very important” in selecting third-party event solutions and partners

Figure 5
“How important are each of the following technical features when evaluating and selecting third-party digital event solutions for your business?”

(Showing “Important” and “Very important”)



Base: 327 senior event services and technology decision-makers who organize digital events and work with at least one third-party service provider
 Note: Showing top 10
 Source: A commissioned study conducted by Forrester Consulting on behalf of NTT Cloud Communications, March 2021

- Up to 67% report that the ability to push attendee data to other solutions within the marketing technology stack (e.g., CRM solutions) is an “Important” or “Very important” criteria in selecting third-party event solutions and partners.

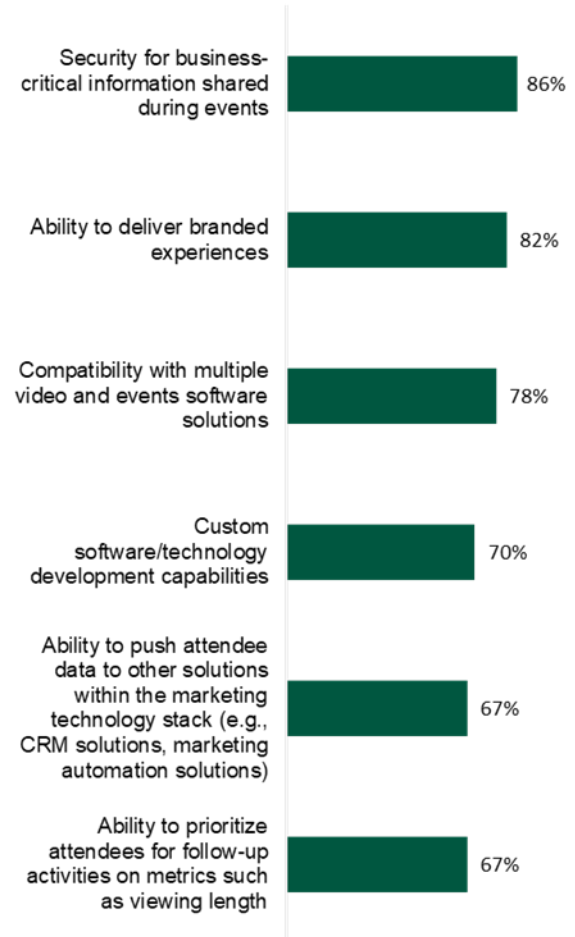
CONCLUSION

Event teams rely on partners to deliver high-quality events for internal and external audiences. According to event leaders, once social distancing restrictions ease and hybrid events become the norm, the relevance of partners will only grow. When vetting potential partners, event teams should verify that vendors have experience across the types of events for which they seek support as well as the set of technologies and capabilities required to successfully run those events. Further, event teams should understand the ability for potential partners to adapt to these unique requirements and offer support across the complete event life cycle from strategic planning to managed services to post-event analysis and optimization. Importantly, partners should also know when to get out of the way and equip event teams with self-service capabilities to quickly stand up high-quality events themselves.

Figure 6

Importance Of Capabilities In Evaluation And Selection Of Third-Party Digital Events Solutions

(Showing “Important” and “Very important”)



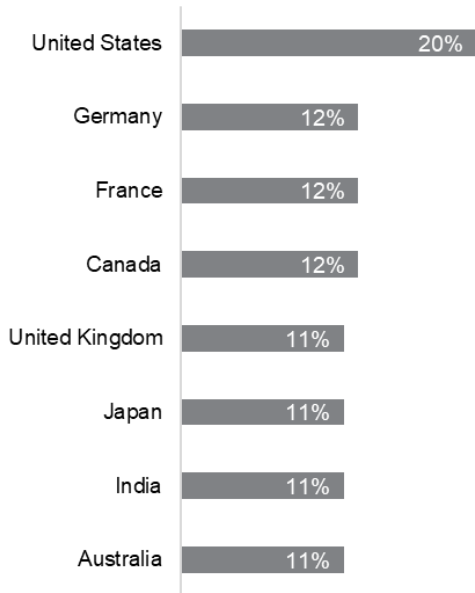
Base: 327 senior event services and technology decision-makers who organize digital events and work with at least one third-party service provider

Note: Showing top 6

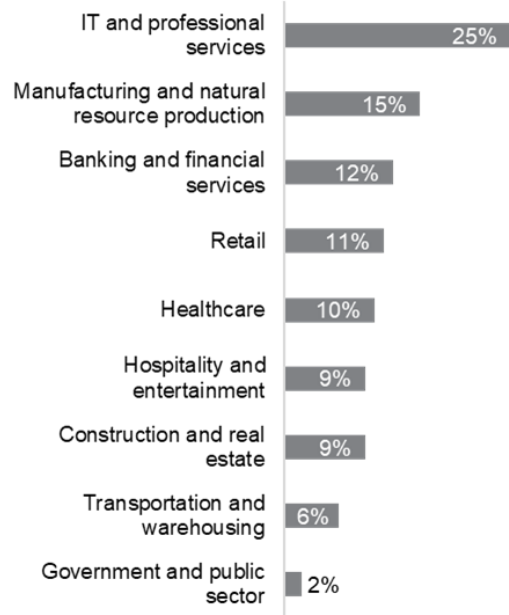
Source: A commissioned study conducted by Forrester Consulting on behalf of NTT Cloud Communications, March 2021

Appendix A: Survey Demographics

"In which country do you currently work?"



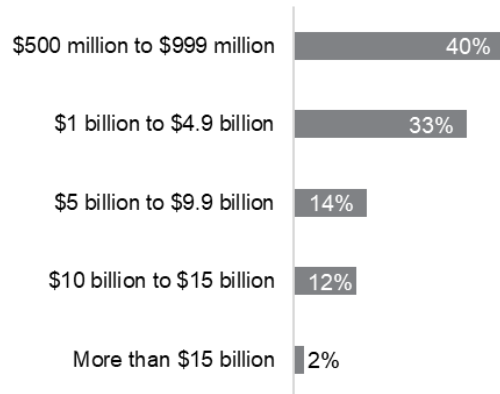
"Which of the following best describes the industry to which your organization belongs?"



"Which of the following best describes your level of responsibility over the planning, production, or execution of physical or digital events at your organization?"



"What was your organization's annual revenue last year?"



Appendix B: Endnotes

¹ Source: "Increase B2B In-Person Event Payoff With Digital Immersion," Forrester Research, Inc., August 14, 2019.

² Source: "Virtual Event Experiences Position B2B Marketers For Post-Pandemic Success," Forrester (<https://www.forrester.com/fn/4m0OVdkI890VGHc2ha7hNb>).

³ Source: "Now Tech: B2B Event Management Software, Q2 2019," Forrester Research, Inc., June 4, 2019.

⁴ Source: "Increase B2B In-Person Event Payoff With Digital Immersion," Forrester Research, Inc. August 14, 2019.

⁵ Source: "The Forrester Wave™: B2B Marketing Events Management Solutions, Q1 2021," Forrester Research, Inc., March 8, 2021.

⁶ Ibid.

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