

First-Party Data Playbook:

Strategies for Event Marketers



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Introduction

What do the NFL and your marketing team have in common? Well, I guess we spoiled it in that sentence, but the answer is: **both are teams.**

You might not have the shoulders of a linebacker (or maybe you do, we're not judging), but you can use their techniques to build an event marketing playbook that turns you and your team into MVPs.

Before we get started, let's make sure we're on the same page.

What's a playbook?

It's a little different from your traditional eBooks and guides. A playbook helps you think about the strengths of your team and how best to use them with different strategies you can choose from.

Why get an event marketing strategy?

If you're reading this, you probably already know that event marketing is a way to promote your brand, product, or service with real-life engagement. But having a proper strategy can **increase brand awareness, perception, loyalty**, and even your **Return on Investment (ROI)**.



This is a playbook for first-party data

First-party data is data you collect directly from consumers instead of from stitched-together third-party companies or sources. First-party data can include really valuable information, such as consumer demographic information, contact details, survey responses, purchase behavior and more that can help you better understand your audience. And, collecting

it directly means you can keep this data for future use in your marketing efforts without another company disrupting collection or managing your relationship.

How can you collect first-party data? Some examples of first-party data vs. third-party data collection are:

First-Party	Third-Party
A restaurant using their own ordering website	A restaurant taking orders on DoorDash or GrubHub
A brewery taking their own tour bookings directly on their website	A brewery using an online travel agency like TripAdvisor for bookings
A hotel offering rooms through their site	A hotel selling their rooms on Expedia or Priceline

Build a strategy around self-sufficiency.

When you use first-party solutions (sometimes in addition to third-party), you maintain a direct relationship with your customers. You can decide what you collect and how you use it. And depending on

whether you're in North America or EMEA, you can make sure that the way you collect data complies with your country's laws.

Who's on Your Events Roster?

Every team has a unique makeup of roles, skills and strengths to achieve their specific goals. Sometimes your roster is a full bench, but most of the time, each member takes on multiple roles.

So before we go further, let's break down who's on your events team and how those roles impact what kind of playbook you can put together moving forward.

Leadership

CMO

The team leader (or captain, to follow the metaphor). The marketing link to the C-Suite.

They decide the larger strategy for the department, approve and fight for budgets, and are who the team reports to.

Most Commonly Found: *All experience types and industries*

Brand Leader

In charge of everything brand. Works on ambassador programs, large-scale brand awareness, sponsorships, and what the brand represents online and physically.

Most Commonly Found: *All experience types and industries*

Event Marketing Leader

Creates the north star goals for events overall and the direction the experiences should go in.

Most Commonly Found: *Alcohol, CPG, Retail*

Strategy and Execution

Public Relations Manager

The ultimate brand champion. In charge of press and public perception, working with PR firms, and strategizing press releases and appearances.

Most Commonly Found: *Attractions, Brand Homes, Distilleries, Breweries, Nonprofits, Retail*

Communications Strategist

They expand the brand across all platforms - digital, event, social, and more. They understand what type of events have the most impact through research and online perception.

Most Commonly Found: *Alcohol, CPG, Retail, Nonprofits*

Field Marketing Specialist

An expert in creating and strategizing which events will make the most impact.

Distributing, sampling, or selling products in the field.

Most Commonly Found: *Retail, CPG, Alcohol*

Promotions Consultant

A team member who helps brands figure out when and how to market a campaign, especially involving discounts or special offers.

Most Commonly Found: *CPG, Retail*

Event Specialist

This person is your boots on the ground. From project management to execution, they take creative concepts and turn them into physical events.

Most Commonly Found: *Alcohol, CPG, Retail*

Tour Operations Manager

When you need someone to oversee your tours, this is your go-to. They're in charge of tour guides, scheduling, and changing tours based on guest feedback.

Most Commonly Found: *Attractions, Breweries, Distilleries*

1.

Event Marketing Plays

Step 1: Pick an Event

Now that you know who's on your team and what they do, now it's time to play to your strengths and choose the right event for your strategy. You have many options, but at the end of the day, it will all be about merging your brand needs with your team's talents.

Classes

Goals: Brand Awareness, Brand Perception, Customer Loyalty, Increased Average Transaction Value, Revenue

Strong For: Event Marketing Director, Brand Director,

Public Relations Manager, Communications Strategist, Promotions Consultant, Event Specialist

Classes are a tried and true method when it comes to building brand growth. These are small groups of consumers who pre-book time with an instructor to learn new information, skills, and more with your brand. It's a great way to give any customer a new way to look at or use your offerings and can accelerate your revenue!





Step 1: Define Your Goals and Product Uses

When planning which classes to offer, think about what you want to achieve. Are you trying to drive awareness of a new product? Or are you trying to teach people different, more in-depth information about the products you already sell?

List all the different ways someone could use the product you'll be focusing a class (or multiple classes) around. Here are some questions to ask yourself to hone in on some of the biggest areas of opportunity with your audience:

- ✓ What product are you asked about the most?
- ✓ Which products are best sellers?
- ✓ Which of your products could be more popular?
- ✓ What is the main skill your customer needs to enjoy your product fully?
- ✓ Are there new or varying ways a customer could use your product?
- ✓ What can your customer make or do with your product?

Step 2: Identify the Who, What, Where, and Why

Now that you have a goal and product in mind, you can narrow down your options for a one-off or series of classes that define your brand and can scale.

Who: Who's teaching the class? When you have specific instructors for different classes listed on your site or booking platform, you'll see that more people will likely book the class. Whoever they are, make sure they're specifically trained around your product and the class they're teaching.



What: What will you use to help your consumers pre-register for your class? What will they have to fill out or spend to attend? If you're doing a simple class as a test or only every so often, you'll probably be better off with a free Google form.

But suppose you're looking to offer classes at scale. In that case, you should consider investing in an experiential management system that can collect data, accept payments, and host a booking page on your site. **Where:** Consider where this will take place. Do you have an in-store room available? If not, do you have retail partners that can host your classes? Do you want to go virtual for these classes? Knowing where your customers are will help you with this step, especially if your buyers are far from your store.

Example: Fleetwood Paints is a leading paint manufacturer and distributor in the UK and Ireland and partners with celebrity brand ambassadors and interior designers for in-store consultations and online guidance via Instagram Live. They could use their retail partners to host their classes and consultations without having their own physical store.

LEARN MORE

Why: Why should people attend your class? What new skill will they leave with if they attend? And why should they trust the teacher you've hired? When you outline everything there is to gain, you're well on your way to creating a compelling booking landing page that converts and convinces consumers to attend.

Step 3: Create a Budget and Choose a Marketing Strategy

When it comes to classes, there are some important budgetary needs to consider beyond just space and employee payroll. You'll need to put a budget towards a few different pieces of your marketing strategy to drive sign-ups and post-class purchasing.

Consider the following when you're starting to plan your budget:

- ✓ How much will go towards social promotion
- ✓ How much will go towards advertising (tv, radio, digital, print)
- ✓ What level of discount you can give attendees towards the product without over reducing your return on investment

Step 4: Automate Follow-Up with Attendees for Feedback and More

Classes are an investment that can scale but takes momentum to keep growing. Part of that momentum comes from continuing the conversation with attendees after their class with your brand.

Make sure that your class registration page asks for email addresses and other demographic information so you can always know exactly who's coming to the event, where they're from, and how to reach them after.

Your follow-up can (and probably should) include:

- ✓ A feedback form
- ✓ A net promoter score rating request
- ✓ A promotion or discount for the specific product or service that's specific to the class they took



Step 5: Use Feedback to Improve and Grow

Once you've begun a chain of classes to feedback and further purchasing, you should gather all the data points you've collected and start finding trends and insights. If you see a repeated negative comment, this is a great chance to adjust your classes to accommodate the feedback.

Suppose you're seeing more people attend your classes from a specific location. In that case, you can re-organize your budget and digital marketing strategy to target that area to drive more sign-ups.

You can even use the promo codes to judge what kind of effect your classes have on purchasing.

Field Activations

Goals: Brand Awareness, Customer Research, Database Building

Strong For: Communications Strategist, Event Marketing Director & Specialist, Field Marketing Specialist, Promotions Consultant

Meet your customers where they're at with field activations! You can grab their attention, build a positive brand image, and, most importantly, convert them into loyal customers.

Field activations, sometimes called brand activations, are when you engage your customers in person, in a location, or at an event they're already attending. With field activations, you create an experience for your consumers outside your brand home, store, or headquarters ("in the field"). That can be sampling a product at a music festival or grocery store or allowing consumers to create a custom version of your product at their local park.

But creating and executing a field activation campaign is no easy feat. It requires careful planning, execution, and patience to get the desired result.



Field activation campaigns require careful planning, execution, and patience to get the desired result.



Step 1: Define Your Goals and Target Audience

You need to define your objectives clearly and have a good understanding of your target audience's demographics and behaviors.

Having clarity about your goals and target audience will help you design a campaign that resonates with them and increases the ROI of your marketing dollar.

This strategy is a burst of brand awareness that's quick, memorable, and good for simple measurements like:

- ✔ Feedback
- ✔ "Product" in "Person" (JustEgg's eggs in mouths, Red Bull's 'cans in hands')
- ✔ Customer Acquisition Cost

Step 2: Determine the Type of Activation Campaign

Once you have identified your goals and target audience, it's time to start brainstorming the type of activation campaign you want to create.

Your activation should align with your overarching marketing strategy and goals. For instance, if you're offering a new product in an already crowded market, you may want to design a sampling campaign, which allows your target audience to **experience your brand** and its products first-hand.





On the other hand, if your goal is to launch a new product, you can create an event that **showcases** your product's features, benefits and uses.

Some other types of activation campaigns are:

- ✓ Street teams
- ✓ Experiential installations
- ✓ Flash mobs
- ✓ Product demos
- ✓ Event stalls/booths

Step 3: Create a Budget and Choose Activation Elements

Your field activation budget should include everything from choosing the event location, hiring staff, creating signage, props design, to product giveaways.

You should allocate the budget to every aspect of your campaign to get the maximum ROI. After creating a budget, it's time to decide on the activation elements.

Activation elements can include:

- ✓ Props
- ✓ Signage
- ✓ Products for sampling
- ✓ Incentives (swag, giveaways, etc.) for consumers
- ✓ Devices like iPads or other tools to help collect data on-site
- ✓ Software and technology to run your event

You could even consider collaborating with other retailers or partnering with local events that can help you secure the perfect location.

Step 4: Find the Appropriate Activation Venue

Creating a unique and memorable experience can The venue you choose for your field activation should be accessible to your target market and a place they go to regularly.

Cost is going to be a factor here, especially if you're renting table space or if there's a paid barrier of entry such as:

- ✓ Space
- ✓ Permits
- ✓ Additional rental costs like electricity or furniture

Example: JustEgg brought their plant-based eggs to a festival, using their metrics "eggs in mouth" and gathering as much feedback as possible.

On Day 1 of their field marketing event, they got a ton of negative feedback: they realized they had paired the eggs with tomatoes, which made the product too watery. They could pivot since they were tracking their goal during the event, and Day 2 saw tons of positive reviews.

[LEARN MORE](#) about JustEgg's field marketing strategy!

Pop-Ups

Goals: Brand Awareness, Customer Research, Database Building, Revenue

Strong For: CMO, Brand Director, Event Marketing Director, Communication Strategist, Field Marketing Specialist, Promotions Consultant, Event Specialist

Pop-up experiences and stores have been a trend in the retail industry for several years now and for a good reason. They provide a unique experience from shopping to walk-throughs and create a sense of urgency that pushes customers to attend since the location's only there temporarily.





Step 1: Define Your Goals and Objectives

What's the goal of your pop-up? They're a significant investment, so knowing your goals and objectives is vital for a good return on investment, more than most field marketing types.

Some goals and objectives that are a good fit for pop-ups are:

- ✔ Introduce a new product or service
- ✔ Test the market and get feedback
- ✔ Clear out old inventory

Step 2: Identify Your Target Market

Who would be interested in the products or services you offer in the pop-up store? Conducting market research will help you identify the demographics, interests, and purchasing power of your potential customers.

Some vital questions to determine your target market include:

- ✔ What is the average transaction value of your customer?
- ✔ Do your customers prefer to shop online or in-store?
- ✔ Where are most of your customers based?



Step 3: Find the Right Location

Location is one of the most critical factors that can make or break your pop-up store. You're not just trying to find a nice-looking building: you're paying rent on space, so you need to consider it like finding a store location.

Look for areas with:

- ✓ High foot traffic
- ✓ A trendy vibe
- ✓ Easy access to transportation

You could even consider collaborating with other retailers or partnering with local events that can help you secure the perfect location.

4. Create an Engaging and Personalized Experience

Creating a unique and memorable experience can differentiate your pop-up store from traditional retail. Don't be happy with another temporary store: treat this like an experience in and of itself.

Incorporate interactive elements such as:

- ✓ Photo booths
- ✓ Games
- ✓ Giveaways
- ✓ Live demonstrations
- ✓ Personalized design, and layout
- ✓ Opportunities for social sharing (hashtags, photo walls, etc)



Pop-up provides a unique experience from shopping to walk-throughs and create a sense of urgency that pushes customers to attend.



Tours & Tastings

Goals: Database Building, Customer Loyalty, Customer Lifetime Value, Revenue Stream

Strong For: Brand Director, CMO, Event Marketing Director, Event Specialist, Tour Operations Manager

Tours and tastings are vital for anyone looking to invest in a brand home. Brand homes, sometimes called brand houses, are experiential and interpretive venues designed to connect brands and consumers to build advocacy, foster community, and grow revenue. They are the physical interpretation of your brand in one location.

Step 1: Define Your Goals and Site Expectations

When preparing to offer tours or tastings as part of your event marketing strategy, it's important to pick your goals wisely. This can be a small investment or a larger push, but it will never grow beyond one tour unless you have a specific idea of what you want to achieve.

Many of those goal decisions will rely on the kind of space you have to host your brand home. Part community experiment and part tourism play, the balancing act you'll be walking must have a definition to it. Pick one of our recommended goals or create your own that works for your brand.





Some of the site expectations you will need for tours and/or tastings are:

- ✔ An authentic experience, like a factory, brewery, or distillery that can show how something is made by walking through it
- ✔ An understanding of which products are a draw and which you can use to support others in a tasting
- ✔ An area where you can accept walk-ins

Step 2: Decide how much to charge for your tours and tastings

This is an important step to consider — it might feel like a short term win to offer a free event at your brand home. But our data tells a different story. When you don't charge for tours and tastings, you have a 40% no-show rate.

If you want to leverage your brand home to drive customer loyalty and revenue, having people show up is in your best interest. We've noticed that brand homes that charge \$10 for their tours and tastings have a 5% no-show rate; that's a steep improvement.

After all, if you don't think your tours and/or tastings are worth anything, why would your consumers?

Step 3: Use a booking system and experiential marketing software to understand the impact of your brand home

A significant investment like a brand home means that free registration isn't going to cut it anymore. You're on the hook to show the immediate worth of your event marketing effort and how it affects your revenue in the long term.

So, how do you make a sustainable brand home growth strategy that scales? You start tracking data.

When you invest in experiential marketing software, you can cover a wider range of attendees from pre-event registration to capturing walk-in data. And, as you continue to grow, you should consider tracking the following data points:

- ✓ Net Promoter Score
- ✓ Brand Conversion Rate (NPS rating before and after your event)
- ✓ Trends in feedback, both positive and negative
- ✓ Popular booking times

Example: Diageo used AnyRoad's registration software and their own AI to create a personalized experience for their brand home guests, creating unique whiskey tastings that matched with their registrant's tastes. This kind of data collection led to a 16-point boost in NPS rating, their main indicator.

[LEARN MORE](#) about how they pulled it off!



Tours and tastings are vital for anyone looking to invest in a brand home.





2.

Event Marketing Plays Step 2: Self-Sufficient Data Collection

Now that you've chosen an event strategy, it's time to move on to the second piece of your playbook: how you're collecting data.

When you collect customer demographic information, contact info, and more yourself instead of with a third-party, you're empowering your team to form their strategy without a middle-man and find ungated trends and specific info they wouldn't otherwise have.

Booking Data

Booking data is any questionnaire or form your consumer fills out when pre-registering to your event. This one is fairly straightforward but does require a form software like Google Forms or AnyRoad to host the questions on and complete the booking.

Walk-Ins

Getting a booking ahead of time is one thing — what if you're in the field and a customer just walks up? How do you get any information from them?

That's always a risk. When you create an event meant to get bookings, or you're working on a strategy that doesn't traditionally take bookings, and a guest decides to drop in, you don't want them to leave without getting their information.

Our tip: use QR codes! Create signage that links to your booking site or a feedback form that a guest can fill out.

"But mysterious AnyRoad writer," you say. "How do I convince them to do that?"

In return, offer them a free gift or something of value like a tote bag, bracelet, or discount. You create a two-way value where both parties benefit from the exchange.

Understanding Post-Event Data

Data by itself is just a mess of numbers. But when you look for patterns, that's when the self-sufficient aspect of your strategy shines.

Which data is important?

This checklist contains all the data points and tracking tips to measure your experiences so you can double down on what works and changes what's not.

Revenue Impact

- Total guests
- Booking revenue
- Add-on purchases
- Purchase behavior influences

Tip: Collect this information monthly to create a benchmark to measure yourself. Industry standards will only get you so far.

Guest Understanding

- Location
- Travel distance
- Age
- Gender
- Brand purchase frequency

Tip: Track the average brand purchase frequency before and after events to determine your strategy's effectiveness.

Operations Optimization

- Guest volume
- Most popular experiences/items
- Capacity utilization
- Walk-in frequency

Tip: Measure the difference between your walk-in frequency vs. online bookings to determine your resource allocation.

Booking Behavior

- Preferred experience times
- Booking source
- Time of booking
- Days booked ahead

Tip: Play with smaller groups vs. larger group sizes for experiences and see what that tells you about behavior.

Customer Voice

- Post-experience feedback
- Guest suggestions
- Trend analysis (similar words used)
- Host/guide ratings

Tip: This is a great place for AI to collect trends and pull out similar language. It will allow you to choose different places to put your manpower.

Brand Perception

- Net Promoter Score (NPS)
- Brand conversion rate
- Brand impact on purchases

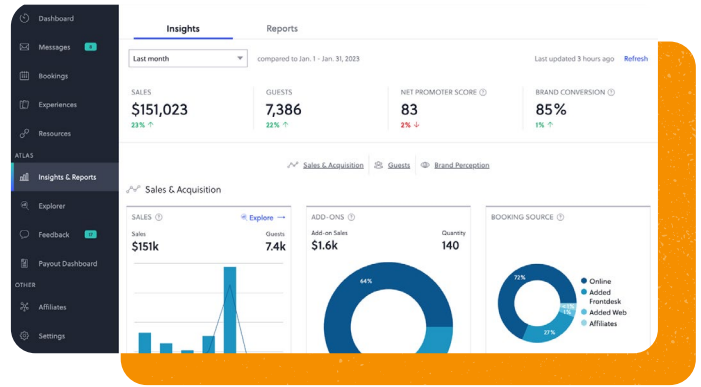
Tip: Calculate the brand conversion rate with two simple emails. Ask for an NPS rating before the booking and an NPS rating after the event. That's improving brand perception and how likely they are to buy after.

One Big Tip: Leverage guest demographics and booking insights from your experiences to help inform campaign targeting, tactics, and spending.



Ready to take the guesswork out of your activations, experiences, and events?

Collect compliant, first-party consumer data during every brand experience and automatically transform it into actionable insights with AnyRoad!



Grow your marketable database and nurture consumer relationships

- ✓ Create customizable surveys that can include demographic information, NPS scores, and other insights important to your brand.
- ✓ Make strategic adjustments to your experiences based on valuable feedback received from pre- and post-experience.

Measure the performance of every experience to streamline operations

- ✓ Configurable dashboards and reports allow you to measure and evaluate operational KPIs that are tailored and unique to your brand.
- ✓ Out-of-the-box dashboards provide quick visibility into brand impact and performance.

Demonstrate your impact on ROI and brand loyalty

- ✓ Discover key drivers of brand perception with flexible guest surveys, question management, and open-text feedback using Natural Language Processing (NLP).
- ✓ Gather real-time insights about who is attending your events and why, and what impact events are having on brand perception.

Deeply understand your customers, feedback, and emerging trends

- ✓ Perform custom segmentation by demographic, psychographic, specific experiences and more to identify key trends.
- ✓ Overlay metrics and choose from a variety of dimension breakdowns to tailor your analysis and even compare performance against peers.



Using AnyRoad Atlas enables us to make smarter decisions on programming, better understand brand loyalty, and influence purchase behavior."

Glenn Cox, Head of Brewery Experience, Budweiser

Make Every Experience Count



3.

Event Marketing Plays Step 3: The Follow-Up

You've held the event. People loved it; or they didn't! You officially know either way, thanks to Step 2. Now, all that's left to keep the momentum going is the follow-up.

When we say follow-up, we mean the next consumer touchpoint after your customer attends your event. That can be direct mail, emails, digital retargeting, you name it. If you're using the data you gathered to make contact after the fact, that's your follow-up.

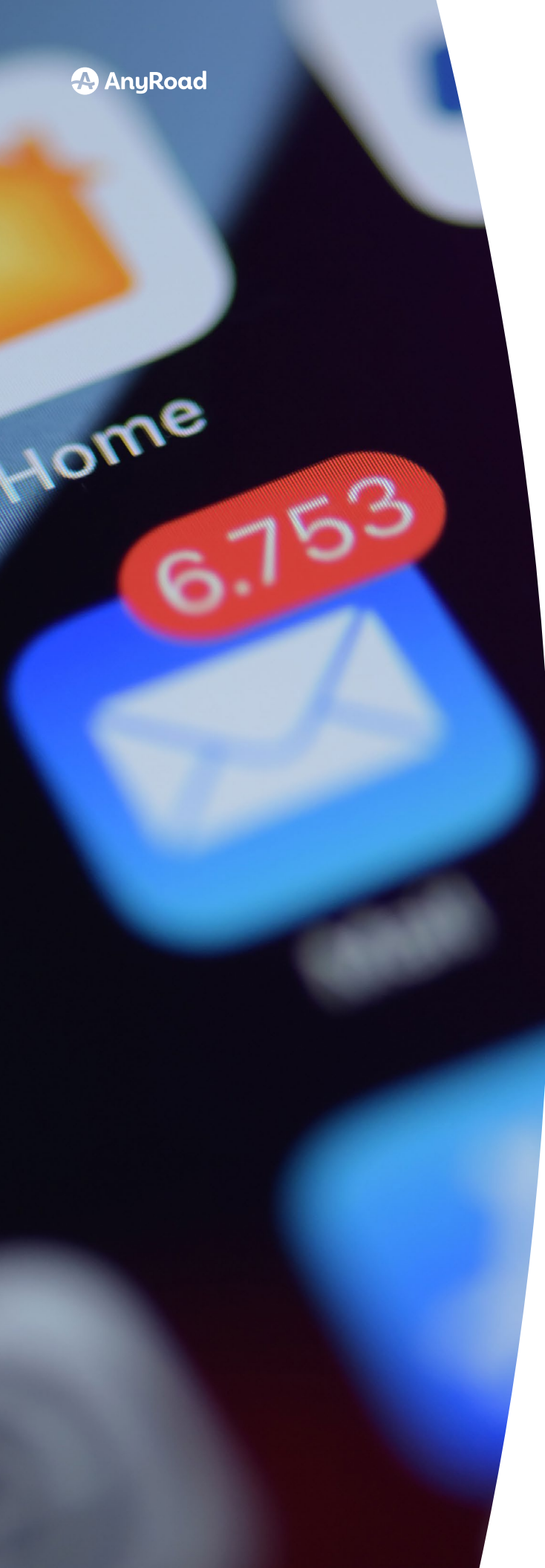
Popular Follow-Up Content

Discounts

Goals: Customer Lifetime Value, Average Transaction Rate, Brand Conversion

Done Through: Direct Mail, Email, Social Media

Whether you're sending direct mail (a pricey endeavor) or an email if you want to track how your event impacted revenue a discount is your best bet. If it's personalized to attending the event (aka a specific code), you can track whether your event impacted buying patterns.



Feedback Requests and NPS

Goals: Event Improvement, Brand Conversion Rate

Done Through: Email

The net promoter score is valuable. This 1-10 rating reflects how your consumer feels about your event. It also lets you know your brand conversion rate (an NPS rating change percentage from before the event to after).

The NPS is your compass while collecting feedback and finding trends is your map. The areas of improvement your attendees suggest are the key to getting your NPS rating up and better results for your event marketing overall.

It's usually a good idea to automate this part. Email the attendees around 4-6 days after your event for the best results, starting with the NPS rating request. When your attendee clicks on the score, you should have an optional feedback survey attached.

Experiential marketing software options like AnyRoad enable this and create a feedback loop that continues to drive your key metrics higher and help grow your events.

Newsletters

Good For: Newsletter Signups, Brand Awareness

Done Through: Email, Direct Mail

If your brand has a newsletter, this is a great opportunity to drive sign-ups! Include a newsletter sign-up in your follow-up with an invitation to stay in contact. If you offer more deals and VIP treatment (like early access to new products or sales), you'll get more attention to your newsletter.



Finalize Your Playbook

We've laid it all out. It's time for you to choose your official strategy and get marketing! Take three or four plays and chain together for a full scope from the event and beyond.

Example:

I'm seeing how Gen Z feels about my brand's Crackers and spreading awareness because I know from previous experiences those who try the cracker are 51% more likely to buy them later.

- ✓ **Play 1:** Field Activation at Coachella
- ✓ **Play 2:** Use a QR code to collect data and feedback
- ✓ **Play 3:** Offer a free Coachella branded tote bag for those who scan
- ✓ **Play 4:** Use feedback to see what Gen Z thinks of the cracker for marketing and R&D

I want to encourage more people to attend my brewery tours and figure out where to distribute my beer next.

- ✓ **Play 1:** A tour of the brewery
- ✓ **Play 2:** Use a booking software to capture data
- ✓ **Play 3:** Collect an NPS score to see if their opinion of my beer changed (before and after)
- ✓ **Play 4:** Offer a branded beer mug as an add-on
- ✓ **Play 5:** Send a thank you email to ask for a review
- ✓ **Play 6:** Note the major location your guests come from and increase marketing spend/beer distribution to that new area



Having a proper strategy can increase brand awareness, perception, loyalty, and even your Return on Investment (ROI).

Don't have the budget or staff to do everything?

Don't panic! Event marketing takes time to build, and you'll never have everything you need. That's what scaling is all about. Make do with what you have and make it repeatable to grow your event marketing to what you dream of.

Remember:

- ✓ Pick what matters
- ✓ Iterate and change out the engines mid-flight instead of trying to be perfect the first time
- ✓ Test, test, and test again
- ✓ You don't have to go it alone. Ask experts for how you can start scaling today

Make Every Experience Count