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Trade Show Events, from Live to Digital:
Towards the Development of New Competencies



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Abstract

Until recently, trade shows and fairs were the primary marketing events in Europe, events for which companies allocated a large slice of their corporate budget in order to establish “live contacts” with the market. In the last few years, all this has changed because the events market has been ‘invaded’ by an array of formats and players, which have not only cast doubt upon the leading status of trade fairs, but are forcing a convergence of competitors and worlds never before imagined.

Concerned about this, the players take a closer look at the differences between traditional and new approaches, between their competencies and those of the newcomers. And they are asking themselves if this is a threat, or an opportunity for future business. To answer this question, this paper analyzes the primary drivers of change. These are identified as pairs of opposites: collective-individual; information-experience; local-global; physical-multimedia; opposites that also highlight key differences in the skills required to organize various kinds of events.

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Trade Show Events, From Live to Digital: Towards the Development of New Competencies

1 Introduction

Until recently, trade shows and fairs were the primary marketing events in Europe for which companies allocated a large slice of their corporate budget in order to communicate with the market through “live contacts”. Moreover, since these were collective events, they were an opportunity to contact a large number of potential buyers at a relatively low cost, because part of the overall organizing and advertising expenses were shared among many. Trade shows and fairs were therefore a particularly effective communication tool for European companies, which were typically small- and medium-sized.

In the last few years, all this has changed because the events market has become much larger and more fragmented, characterized by the development of a large array of formats and contents that are being used by companies. Added to this, companies are now more mature and have better communication skills and sales resources. As a result, there is a growing demand to have individual events for customers or for the corporate image, with many of these also finding a new life in the mass media or on the web. In other cases, because of the action of new players, events for the media are finding live formats, bringing together suppliers and sponsors and contacting specific targets with ad hoc solutions for local territories and vice versa. Lastly, the web and social networks are being used increasingly more often for virtual events or to support physical events, either nationwide or abroad. Consequently, this has not only cast doubt upon the leading status of trade fairs in the events industry, but the number and typology of competitors in the sector has expanded, with a convergence of competitors and worlds never before imagined. Concerned about this, the players in the exhibition sector take a closer look at the differences between traditional and new approaches, between their skills and those of the newcomers. And they are asking themselves if this is a threat or an opportunity for future business.

In an attempt to answer this question, this article analyzes the drivers of change with the greatest impact on the exhibition business (Figure 1). These are identified as four pairs of opposites having an impact on the various elements of the external environment that organizers have to deal with, that is: customer exhibitors, audience, market size and technology. In practice, the elements that are analyzed influence the need for skills required by organizing companies wishing to operate in new fields of activity. The first opposite concerns trends in exhibitor needs (investors in communication) and analyzes the collective-individual relationship, considering not only the tendency of European companies to shift marketing investments from collective events (trade shows and fairs) to individual ones, but also the growing tendency of these companies to no longer interpret attendance at traditional trade show events as a cooperative choice, in the interests of local industry, but as an individual choice, in the interests of its own strategies only. The second opposite concerns the needs of the audience (recipients of the communication). The future changes are outlined here in the information-experience dichotomy given that visitor-participants at events are less and less interested in obtaining information from showcase-events, and increasingly more interested in the experience and knowledge offered by activity-events where transfers occur through meaningful emotions, trials and relations.

The local-global opposite in the events industry concerns the location of markets and therefore the size of the organizers' business, which need to adapt their structure to the location. In fact, we are witnessing a gradual reduction in hub events, hosted in one venue with a wide international appeal versus a rise in parallel events that target various segments of local demand, repeated in various places and very often also supported by various media. The problem in this case is that organizers need to follow their customers in this kind of communication, which provides close contacts with single overseas markets. The physical-multimedia opposite concerns the technology and creation of events. For some time, the organizers of physical events, especially trade shows and fairs, have been looking apprehensively at developments in digital technology, which initially seemed tipped to take the place of exhibitions in providing information on purchase choices for potential buyers. This prospect has now changed with digital technology and the web in particular, pointing in the direction of hybrid and complementary uses especially, that are not only aimed at making the basic services offered by physical events more efficient, but look mainly set to channel the contents on various media, especially by taking advantage of social networks. On the other hand, trade people who have tried to develop events and search engines in the mass media and the web seem to have developed important skills in these fields, allowing them to enter easily into the physical events industry, an area where a very large number of such individuals are entering.

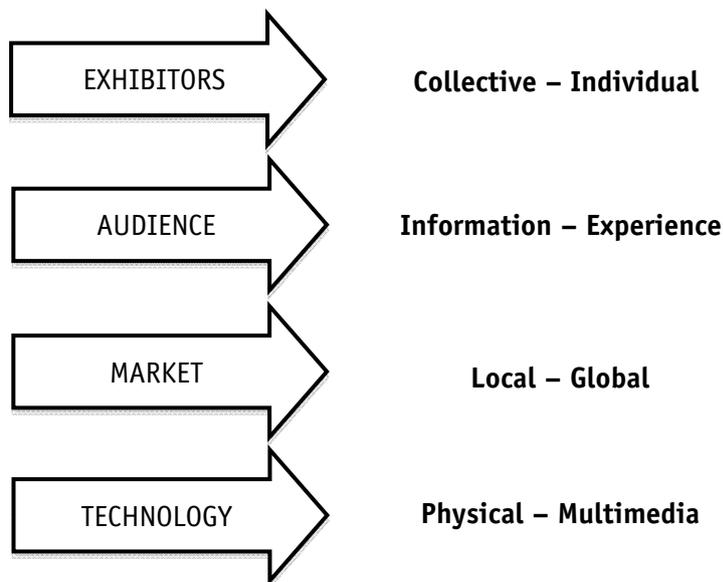


Figure 1: *Drivers of change in the trade show and fair industry (authors' elaboration)*

When these development trends applied to the exhibition industry are examined, considerable opportunities emerge, as does the need for organizers to invest in the development of new skills. In fact, each of the drivers that have been identified calls for a significant change in the approach to use; therefore it will be a matter of first assessing if the competencies acquired in the past are sufficient to face the various scenarios. For each sector of activity, the specialist competencies of companies – those that stand apart from the others – are fundamental for development and survival in an ever more competitive world. However, specialist competencies are also what prevents companies from seeing outside the paths trodden in the past, thus hampering their ability to innovate.

In the following paragraphs a description will be provided for each of the four drivers of change and of the general shortcomings in skills that emerge when moving from a traditional exhibition activity to one that takes account of the new trends. The paper ends with some observations on the means by which the new competencies can be developed.

2 Exhibitor needs, from collective to individual communication

One of the ways to measure the divide between the traditional industry of trade shows and fairs and that of more recently developed events concerns exhibitor needs in their role as investors in live communication. In this area one can mainly see the gradual shift in interest from a collective perspective to an individual one, a shift that emerges both when examining the type of events that company communication budgets have focused on more recently, and also when considering how the same exhibitors act at traditional collective events.

The basic observation concerns the fact that investments by companies in marketing events are growing sharply (Event Marketing Institute 2012; Event View 2010) and have partially replaced traditional advertising investments (Event View 2010). Available statistics on marketing events, unlike trade shows and fairs, do not provide a reliable census of the number of events held in the various countries, because of the fragmented initiatives and the lack of central control or certification institutes; they are therefore based on the perceptions of samples of investors in events that in any case have the merit of offering a snapshot of the importance that these communication tools have acquired (stable or rising over recent years; see Figure 2) and of the intention to invest (rising; see Figure 3).

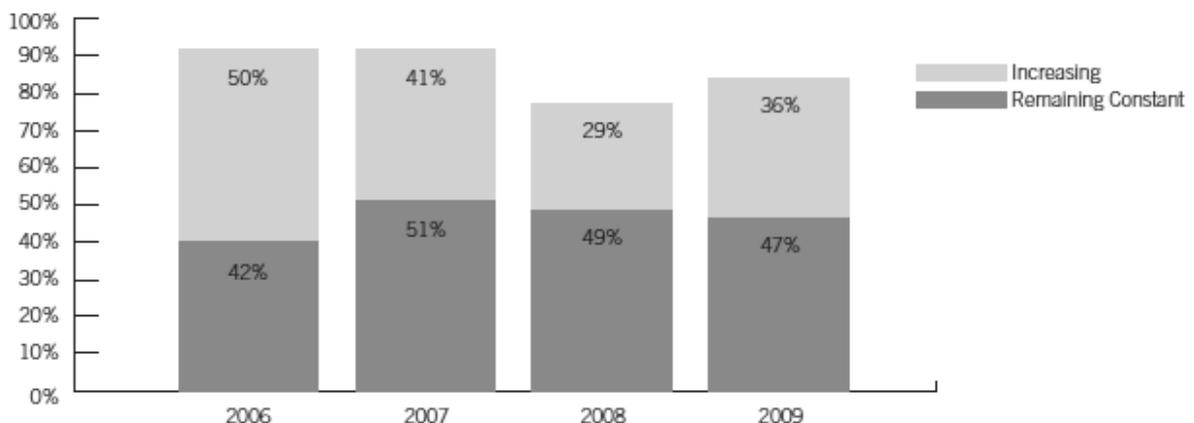


Figure 2: Importance of events in the future (Event View 2010)

In fact, events have proven to be more effective than other tools with regard to multiple marketing objectives – establishing and cultivating relations with customers and intermediaries, launching new products, supporting their corporate brand or image, obtaining media coverage and so on. The advantage of physical events is their greater pulling power among the participants, thanks to the potential of the ‘experientiality’ they possess, and also because they capture the attention of the media more easily. This ability of live events to involve participants has recently fueled an assortment of new formats and creativity and has generated connections with other instruments and other channels of communication, like television, social networks, etc. Today, this kind of variety has made any efforts to classify the various kinds of events more difficult or, at least, temporary (Matthews 2008; Rinallo 2011).

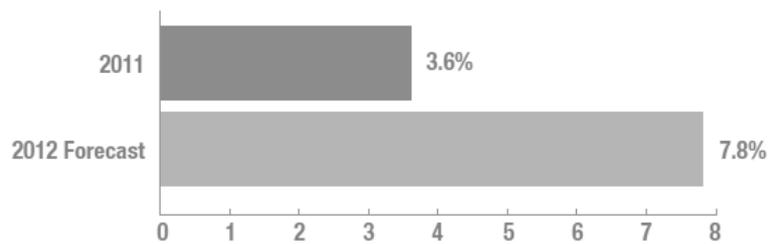


Figure 3: Event and experiential budget growth 2011 and forecast for 2012 (Event Marketing Institute 2012)

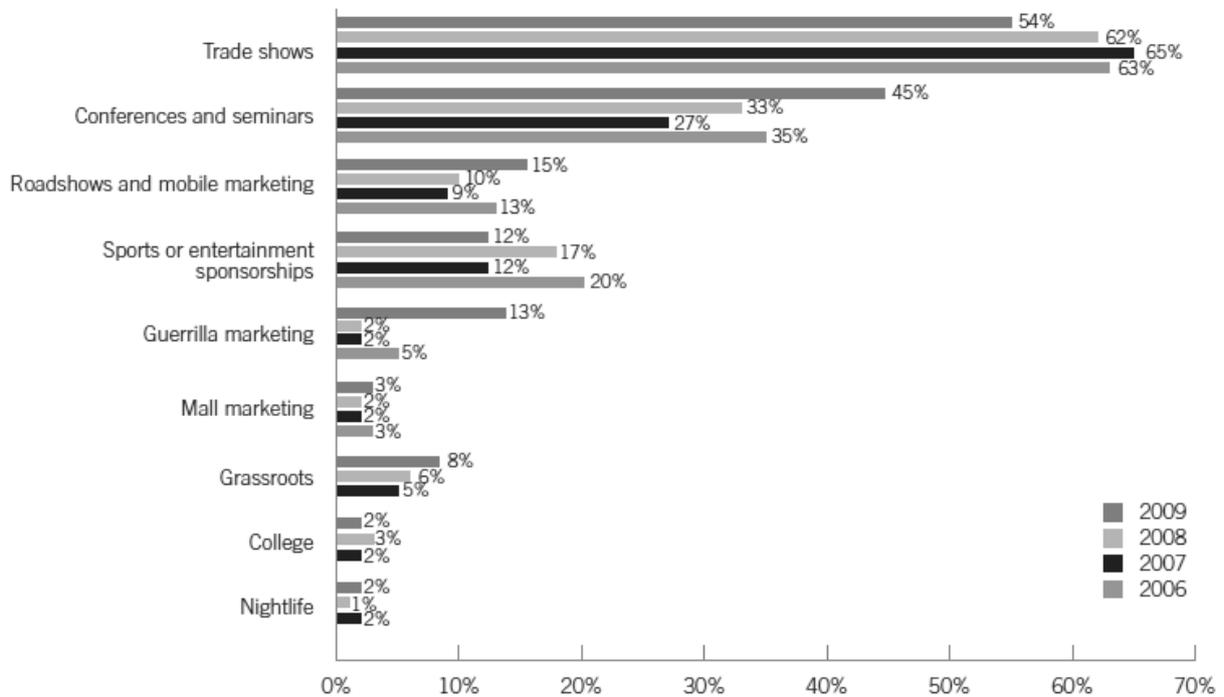


Figure 4: Distribution trend for marketing events (Event View 2010)

However, whereas collective events, such as general or trade exhibitions prevailed in the past (Golfetto 1988; Golfetto 2004), the market has recently begun to ask for growing numbers of individual events. Statistics, where samples are strongly unbalanced in favor of large companies operating on consumer markets (that is, companies which have historically expressed less demand for participation at exhibitions), show a decrease in trade show and fair investments compared to other live events (Figure 4).

At the same time, according to sources focused on the exhibition sector, exhibitions appear to be in a state of saturation (Auma 2011; CERMES 2011a) (Figure 5). So, in addition to the specialist exhibitions of manufacturing sectors and other collective events such as fashion shows, pharmaceutical conferences, etc. the following events are spreading rapidly: road shows, company conventions and open houses for business-to-business type contacts; 'guerrilla marketing events', product dramatization events, brand events and so on for business-to-consumer contacts (Bowdin et al. 2001; Matthews 2008). Events of this kind are occupying a great deal of space in below-the-line investments because they provide a more specific response to the various communication objectives of marketing, corporate communication and in-house and financial communication (Rinallo 2011).

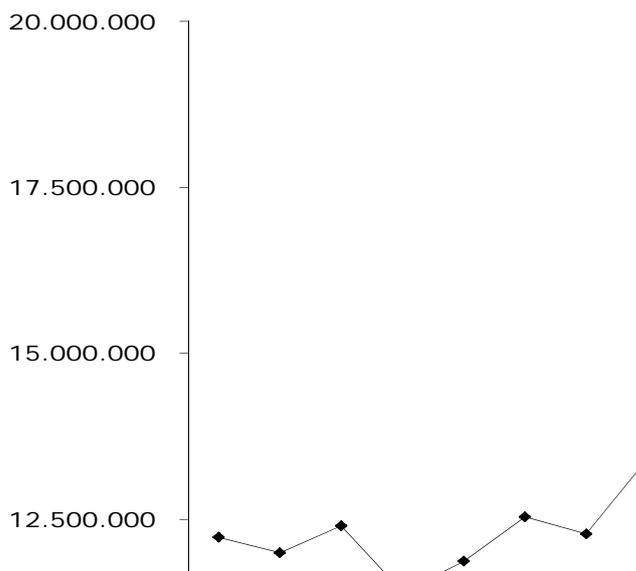


Figure 5: *Floor space sold at international exhibitions in the main European countries (sq. meters; Germany, Italy, France, Spain 1990-2010) (CERMES 2011a)*

It is also important to note that recently even collective events themselves have taken on features more akin to “individual” events, if viewed through the lens of exhibitor behavior. While the meaning of participation in trade fairs in Europe (above all, events for trade professionals in Italy) until recently was very much linked to the idea of belonging to an association of local producers (in that trade fairs represented the collective promotional activities of the fair district or the domestic industry), development of the international trade fair system on the one hand, and the internationalization of businesses on the other, caused an “explosion” in the specific needs of businesses to participate in one or the other events, based on their own marketing objectives, even if this went against the interests of the associations. In fact, growing numbers of companies are attending exhibitions in other European or non-European countries, very often deserting and impoverishing the exhibitions in their own area. As a result, many exhibitions which were previously export-oriented (exhibitions of local supply), have become import-oriented exhibitions (for local demand), where the exhibitor base is much less cohesive than in the past given the growing participation of exhibitors from other areas. Exhibitions of local supply, which even in the past were the basis for the development of many specialist exhibitions, are now in the minority and only survive in some countries – such as Italy for example – and in sectors where the local industry is an international leader (CERMES 2011a).

Yet, in other cases, the need arose for many companies to distance themselves from collective events, precisely to explore new forms of contact with potential clients. One example is the numerous cases of open houses or private conventions often held by companies during the main collective exhibitions, in order to exploit the appeal of the latter. Largely contributing to this new behavior is the growth of many manufacturing companies and the need of larger firms to be at the center of attention. In fact, the collective-standardized event project makes sense as long as the businesses involved are small and have limited marketing skills. After such an event, each firm discovers the desire to stand out from its competitors. For exhibition organizers this is a serious problem because when large companies leave exhibitions it means that they will lose a good deal of the ability of the exhibition itself to deliver information, given that at exhibitions the leaders are used as a benchmark when judging the innovation of other companies. As has been pointed out in a number of recent studies, potential buyers follow a very specific and repetitive visit pattern, which involves first paying a visit to the trend areas (if there are any), and then going to the stands of leading companies which are considered to be the most innovative. In fact, this is followed by a visit to the stands of regular suppliers, which are then compared with the leaders. Only at the end, do they have a look around the stands of new suppliers that have previously been identified (Borghini et al. 2006). It is no coincidence that some important exhibitions suffered a sudden decline after leading companies stopped participating (as was the case of *Première Vision* versus *Interstoff*; see Rinallo and Golfetto 2011; Golfetto and Rinallo 2012; Bathelt et al. 2014).

What can be done? For exhibition organizers, the new demand for individual events and new developments in customer individualism often pose the problem of whether, and to what extent, these developments should call for a major overhaul or at least for a diversification of what is being offered. The considerations that need to be made therefore concern the contents of the various activities, both traditional and new. This is because the organization of collective events and the organization of individual events involve activities that require very different competencies.

Trade shows and fairs are collective events that are created by bringing together hundreds (at times, thousands) of exhibiting firms. Each business event can have up to hundreds of thousands of visitors and each consumer event up to millions of visitors. Obviously, with such a multitude of exhibitors and visitors, each with their own communication needs, the task of the organizer is mostly logistical, whereas there is little room for the exhibition contents: in the sense that the organizer’s role revolves around organization of the

physical spaces that will host the exhibitors, especially coordinating the technical services (fittings, furniture, utilities etc.) required during the event (Golfetto 2004; Rinallo 2011). Within this sphere, a sophisticated task is that of organizing the exhibition layout to give meaning to the whole, spotlighting the exhibitors and products symbolizing the most significant developments in the sector. Grouping exhibitors by production technology, product level, or final market are important decisions that not only allow visitors to better understand what the alternatives are, but also help to establish the competitive areas and emerging product categories for the sector (Rinallo and Golfetto 2011). This activity, which in practice means that an event sends out a message on the current – and possibly future – situation on innovation, is built by selecting the exhibitors, arranging the stands, as well as by acquiring knowledge about future trends in markets. This is a very valuable activity, which is often able to influence markets and which is very typical of collective events (Golfetto and Rinallo 2008a; Lampel and Meyer 2008; Rinallo and Golfetto 2011). Recent analyses have demonstrated that even if some trade shows and fairs started late and with significant disadvantages when compared to other well-established exhibition giants, they have managed to overtake their competitors by focusing on the very needs described above (Golfetto and Rinallo 2008a; Bathelt et al. 2014).

Finally, the organizer is expected to inform/attract potential visitors from the various demand markets, an activity that, for the most part, is carried out through advertising in the media, with presentations and road shows in areas with the greatest demand. It is also worth pointing out that since trade shows and fairs are periodic events, this activity is generally repeated yearly with very few variations and in the same spaces; communication mainly makes use of the same contents that were used in the previous years; the exhibitors themselves prefer to occupy the same space they held on previous occasions to be more easily tracked down by visitors. Finally, visitors are mainly regular visitors, with very few changes between one session and another: trade shows and fairs are, in fact, veritable rituals in the sector and the business community, which is how they have been interpreted recently (Golfetto et al. 2005; Borghini et al. 2006; Rinallo 2011). Even the organizer's revenue model is essentially tied to the exhibit spaces and the regular sale of these spaces. Its turnover is a direct function of the amount of space sold and can be scheduled in time. Only a minimal part is associated with other services. Consequently, in this activity, the organizer forges strong bonds with the exhibition venue (supplier of space and technical services) on the one hand, and with the local manufacturers' associations (which represent most of the exhibitors) on the other, when the organizer itself is not an association of producers (Golfetto 2004; Fondazione Fiera Milano 2005).

The organization of individual events has an entirely different structure and quite another revenue model. The typical core business of event organizers consists of designing the communication and the message of the company (or that of a limited number of firms) that promotes the event. At times, the company is not even personally present but acts behind the scenes with the experience it showcases, therefore there may no longer be an "exhibiting" company in the strictest sense. On the other hand, organizing an event means delving into brand values, the characteristics of the target market, media planning decisions, and various other services to form a much more close-knit and in-depth relationship with the products and the company that wants the event. In addition, individual events are never alike, nor is it possible for the event organizer to work for competing businesses at the same time. Finally, the revenue model of the organizer is structured along a variable number of services and commitments. In essence, this is about the organization of a marketing communication schedule that is very similar to advertising communications, but that must also be able to address logistic "complications" due to the physical nature of the event. Ultimately, the distance between collective and individual events is not so much tied to the number of exhibitors-investors wishing to promote themselves through a marketing event, but rather the difference between managing exhibition spaces and managing communications, although both rely on the physical support (channel).

In the end, many organizers have already experienced this trend from the collective to the individual in the more modern consumer fairs, where demand has grown exponentially from businesses that no longer want to be exhibitors inside a standardized event-showcase, but prefer to be the star players on the stage of their own events. Consumer fairs are becoming more like a set of events within an event. However, these are almost never created-managed by the exhibition organizer.

3 The needs of the audience: from information to experience

A key driver of change in the events industry concerns the type of interaction and exchange that events offer to participants – the potential vendors on the one hand, and the potential buyers on the other. Change comes in the form of a shift in the exchange model from one of “promotion-information” to one of “promotion-relationship-experience”.

A golden rule of advertising communication is the concept of exchange that it offers: basically the message gets across only if the recipient receives something. For example, people read ads because they provide information (promotion-information exchange, Abernethy and Franke 1996) or because they are amusing (promotion-entertainment exchange; Hornik and Miniero 2010). At trade fairs the more traditional exchange takes place through the promotion-information exchange; in other words, visitors receive (accept) the exhibitors’ promotion against the background of information they receive by comparing the varieties and features of the supply in a certain market (Golfetto 1988; Florio 1994). This kind of model has characterized trade shows since the earliest generalist sample fairs, which the end users and industrial buyers attended to gather information about the latest developments in products and technologies.

Even so, the promotion-information exchange model is now in a state of crisis (as occurred in the past with advertising). And the crisis began with the generalist sample fairs, in the exact moment when information about products and developments in technology became more easily accessible through mass communication and large-scale distribution. In fact, generalist fairs quickly went out of style (with just a few exceptions), leaving the stage to trade fairs specialized by sector and dedicated to industry professionals, for whom the quest for information by potential buyers was still a strong motivation. Consumer fairs maintained an interesting vitality only for “problematic” products, that is, products which, depending on how new they were (or how difficult they were to understand) or the amount of investment required, justified in-depth and active research by the consumer. With the advent of the Internet, however, these exhibitions also started to decline rapidly. At the same time, consumer fairs regained momentum (Golfetto 2004) with the advent of the new promotion-relationship-experience model.

Demand Logic = Analysis of buyer experiences and assessments

| | | | |
|----------------------------|---|----------------------|------------------------------|
| Anticipation | Purchase | Use | Memory – Review |
| Experiential communication | Experience at retail outlet or supply point | Experiential product | Tangible and sharable memory |

Supply Logic = “Experiential” enrichment of supply and communication

Figure 6: *The experiential perspective: demand and supply logic (Golfetto et al. 2005)*

The concepts of consumer experience (demand) and of experiential market (supply) (Figure 6) were introduced in literature and managerial practice a few years ago (Pine and Gilmore 1998, 1999; Schmitt 1999). "The Experience *IS* the Marketing" was the poster that led to this introduction. According to Gilmore and Pine (2002), the commercial success of a product has much more to do with the ability to build experiences for the consumer than do any other promotional and sales skills in the strictest sense. Important sensorial and emotional experiences seem to be able to attract potential buyers more effectively than any other message or method of communication, basically putting marketing efforts that are based on traditional levers in the shade. According to this point of view, the "experiential" perspective intervenes in the processes by means of which individual identity is built, leveraging on much more sophisticated and complex needs than those associated with simply possessing or using products per se (Holbrook and Hirschmann 1982; Carù-Cova 2003). Therefore, many companies began to introduce highly imaginative, aesthetic and symbolic contents in their products that strengthen the contents of the sensorial experience; retail outlets offer a growing number of shopping experiences with opportunities for recreation and socialization, advertising shows experiences that leverage on the "personal" relationship between consumer and product and on the relationship with the consumption "tribes", and so on. Finally, events have become the primary channel for experiential communication, both as regards to relations with end users, as well as relations with business buyers. The experiential approach has laid the foundation to re-establish mainly the B2C exhibitions (Peñaloza 2000; Peñaloza 2001), which had lost their drive over recent years, especially in developed countries.

Long before the concept and the techniques of experiential marketing began to take hold (which, as often happens, was a result of after-the-fact rationalizations), some fair organizers and exhibitors figured out that fairs, as live events, have the ability – through direct engagement with participants – to offer what consumers are most ardently seeking, that is "engaging experiences" or opportunities for socialization, experimentation, and fun. So, they transformed their event-showcases into event-activities where visitors became participants, placing themselves in an active relationship with the products, with advertising stage-sets, and above all with the other participants. The fact is, today few still attend the Salone del Gusto [Food Fair], the Festival del Fitness, or the Motor Show to gather information about what is new in the marketplace. After a few visits, they already know all about it and can easily find out the rest on the Internet. What drives consumers to visit and return to the fair is the experience of the event itself, the emotions it has to offer, and the fact that it is possible to immerse oneself in a system of experiences, opportunities for relationships, contacts and meetings that stimulate and reassure about the groups one belongs to, and one's personal value system and sought-after lifestyle. For example, the stories told by visitors reveal how a new perspective on organic food or taking care of one's body is reinforced by interaction with other individuals at the stands of suppliers. Or, the motivating satisfaction of having tried out and talked about a motorcycle with a sports champion or having planned trips in the desert with others who share the same passion. On the other hand, most of the exhibitors at consumer fairs have leveraged these trends and increased their demand for experiential stands where the focus is on the relationship between visitors and products rather than on information about products. Or they have opted to emphasize the interaction of visitors with others who share their passion and the perception of a general atmosphere over a relationship with the supplier. In this way, companies manage to establish closer ties with their current and potential clients and with the communities they activate around their hobbies, consumption styles, and the brands themselves (Rinallo et al. 2006).

In the case of B2B fairs, this process started later and is still ongoing as the fair remains one of the pivotal information resources for company decision-makers. Nonetheless, several years ago, from surveys taken at the top trade fairs worldwide, it became clear that the motivations of visitors to have information prior to purchase (with the aim of placing orders) was only marginal (Fondazione Fiera Milano 2008). First and foremost is the issue of the experiential exchange of competences between companies that are not yet in

direct contact with each other (Golfetto 2003; Golfetto and Mazursky 2004; Golfetto and Gibbert 2006; Zerbini et al. 2007; Zerbini and Borghini 2014). The presence of finished products, prototypes and other kinds of manufactured goods along with experts is one of the main channels by means of which producers present themselves with their skills, in practice disseminating competence and innovative ideas to all those present. This is a fundamental aspect because it not only means that the best new and current suppliers are selected, but also makes participating at exhibitions such an engaging experience that it becomes a must-have in product design and selection cycles for all manufacturing firms. At European trade fairs (different from emerging countries), visitors are driven primarily by the need to understand where the industry is going, to search for new ideas, and to make sure the choices they make for the future are appropriate (Golfetto et al. 2005; Borghini et al. 2006; Rinallo et al. 2010) (Table 1). But visitors do not form new ideas through imitation of the things they have seen. The ideas come from intellectual stimulation, sensations, perceptions of the market climate, contact with trends taken to extremes, and from interaction with and perceptions of the behavior of others. In short, ideas flow from this vast sensory immersion, that opens a window on understanding the future, is different from that of consumers because, rather than being essentially hedonistic, it serves an instrumental purpose, namely improving one's business (Rinallo et al. 2010). And the immersion is even more productive when it is not limited to a mere display of a hundred exhibitors (lined up as in a shop window), but rather entails a variety of products, innovations, opportunities to interact and perspectives, experiences with experts and manufactured goods.

Table 1: *Visitor experiences at trade show (Rinallo et al. 2010)*

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|---|
| <p>Trade show visits as embodied experiences</p> <p>The information-processing situations faced by visitors are characterized by: sensorial overwhelming; information overload; physical fatigue.</p> |
| <p>Trade show visits as instrumental experiences</p> <p>For professional visitors, valuable trade show experiences provide: cognitive stimulations that result in learning and new knowledge; opportunity to relate to exhibitors and other visitors to get knowledge and other benefits for their activity; reassurance for present and immersion in the industry future a sense of community.</p> |
| <p>Inspiration search and supplier comparison patterns</p> <p>Visitors aim at getting inspiration and competences for their activities. Typical visit: 1) starts with market leaders; 2) continues with regular suppliers, 3) only devotes residual time to other suppliers. The trend area is appreciated as it helps to organize ideas about innovations.</p> |
| <p>Relational experiences in a ritualized context</p> <p>The relational activities involve vertical and horizontal relations. Trade shows allow visitors to relate to their broader cultural and social context. Trade shows represent rituals for their underlying industries.</p> |
| <p>The perceived value of exhibitors and organizers' experience providers</p> <p>The most appreciated exhibitors' experience providers are: the presence of products; competent personnel. The most appreciated organizers' experience providers are: exhibitors' selection and distribution of exhibitors in the exhibition space according to visitors' search processes; trend and rest areas; social and technical events.</p> |

In the pursuit of these elements, visitors bask in the atmosphere that surrounds the events, fueling spontaneous phenomena like off-site events and the likes. Businesses and cities are well aware of these phenomena and often respond by organizing spaces and opportunities for interaction, and not just commercially-oriented activities, but also recreational and cultural events that palpably enhance the climate and the fair experience tied to the participants' field of interest. This is how it was, for example, in Berlin when visitors from the fashion world went outside the 'official' show venues in search of the perspectives of taste and traditions of a Europe that was expanding. The same process happens today at the Salone del Mobile in Milan where the 'Fuori Salone' (off-site events) have become a fixture and a serious matter, attracting a large number of professionals and young people who cultivate a passion for the various sectors and sub-sectors of design that are looking for inspiration and ideas for new products by participating in the rites and rituals of their community and by observing the behavior of the most sophisticated consumers, the Italians, of course (CERMES 2011b).

In summary, the need of experientiality expressed by visitors (better defined as participants) is a huge factor in the changing format and content of marketing events, both individual and collective. There is still a big difference between consumer events and business events, even though both have shifted from a "promotion-information" to a "promotion-relationship-experience" model in the vendor-purchaser exchange. The experience and the relations sought after by end consumers are in fact very much associated with entertainment, socialization, and self-reassurance. Instead, the experience the world of business seeks is more exploitative, tied to business, and is undertaken in the hope of resolving problems of general knowledge and of knowledge-exchange about the future of the industry. It is also focused on the exchanges between demand and technology, and the alignment of working methods among companies which, through events, achieve what has also been called "competence-based communication" (Golfetto 2003; Golfetto and Mazursky 2006; Golfetto and Gibbert 2006; Zerbini et al 2007; Zerbini and Borghini 2012, 2014).

In the B2B sectors, however, the experiential perspective is still (mostly) waiting to happen. Furthermore, this perspective has, until now, remained well outside the activities of many organizers who have, instead, benefited from the experiential activities of their exhibitors' stands. In order to be able to work on experience, it is necessary to have a very good knowledge of visitors-buyers (current or potential), influencers, and their behavior patterns in decision-making and purchase processes. It is also necessary to know the community and understand why consumers and people from companies want to share physical events. It is by no means easy for an exhibition organizer to acquire this knowledge, since they are more focused on learning about their direct customer (the exhibitor) than the customer's customer (the visitor) (Golfetto and Rinallo 2008b). This is very often the case because organizers are the offshoot of manufacturers' associations which know their own members better than they know their markets. Ultimately, it should be noted that the driver of experiential activities is prompting a robust requirement for creativity on the part of event organizers, be they individual or collective. Indeed, in order to be memorable, the experience certainly cannot be the same as last time.

4 The internationalization of markets and organizations: from a local to a global approach

A third factor that is profoundly changing the world of events is globalization. Once again using trade fairs as a point of departure, we can see how they are by definition instruments made for internationalization, thanks to the central role they play in the import-export world. Among the leaders are the events that have tackled this problem.

Until recently, the internationalization of collective events (especially of European trade shows that were also global leaders) was based primarily on the “hub” model. These leading international trade shows achieved a “hub” reputation because they had a vast number of investors-exhibitors and buyers-visitors from other countries (Fondazione Fiera Milano 2008; Bathelt et al. 2014; Golfetto and Rinallo 2014). Consequently, the potential trade ensuing from this model of commercial events expanded well beyond the country hosting the event. This model was most successful in Germany, France and Italy, which were constantly competing to create intercontinental events (with international exhibitor and visitor attendance higher than 50% on average, see Germany in Figure 7) where the various manufacturing sectors were represented and which were must-attend appointments for all trade professionals. These countries continue to host almost 70% of visitors and exhibitors at international exhibitions throughout Europe (CERMES 2011a) which are concentrated in cities that are more easily reached within Europe and in the heart of the main manufacturing areas. This model was also supported by the fact that Europe found itself at the center of the global manufacturing system, and at the same time, it was one of the primary and most sophisticated demand markets as well as the number one market for imports and exports. Hub events are in fact the end product of strong local demand (that is, with a large catchment area of local visitors) attracting large numbers of visitors from neighboring areas who, in turn, attracted other visitors and so on (Golfetto 2004; Golfetto and Rinallo 2014).

Alongside this model, however, another was slowly taking shape based on the concept of multinationalization, or on the repetition of the same or similar events in other countries, especially in developing nations that showed potential as importers. Leading this process were the multinational trade shows (which had sprung up around multinational publishing especially B2B) and the German trade show organizers, the greatest collective event organizers in Europe. One example is Reed Exhibition, which organizes hundreds of exhibitions that are mainly B2B worldwide. Many other similar organizations have spawned especially in the United States and Asia and more recently in Europe. The German exhibition complexes are very different, however, since these are controlled by local governments in the region where they are located (Länder) and sometimes, almost in contrast with the latter, have expanded their range of action, especially into Asian regions (see Rinallo and Golfetto 2014 for a case study of Messe Frankfurt’s internationalization strategy). In actual fact, the model tended to repeat the format of the most successful European events in the newly developed countries, but with producers-exhibitors that were primarily local, given the low international reach of European exhibitor companies. So these initial developments had very little influence on the world of Europe’s collective events. For many years, for example, extra-European events accounted for considerably less than 5% of total revenues by German exhibition complexes.

More recently, however, the multinationalization model has taken off. The rapid development of the BRIC countries and their increased import capacity sparked the participation of European businesses in events in those countries and made European organizers feel the sudden and urgent need to participate in (and perhaps even guide) this process. An important thrust also came from the fact that the number of international visitors at European events was also declining while the model of collective events was asserting itself in 3-4 large global geographic blocks (Europe, North America, Asia, and South America; UFI 2011, Golfetto and Rinallo 2014): Europe was losing its supremacy.

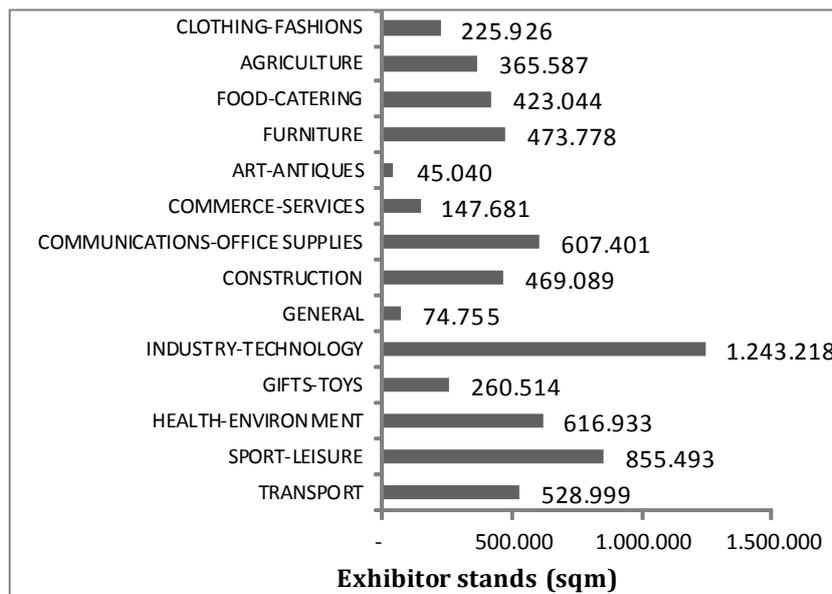
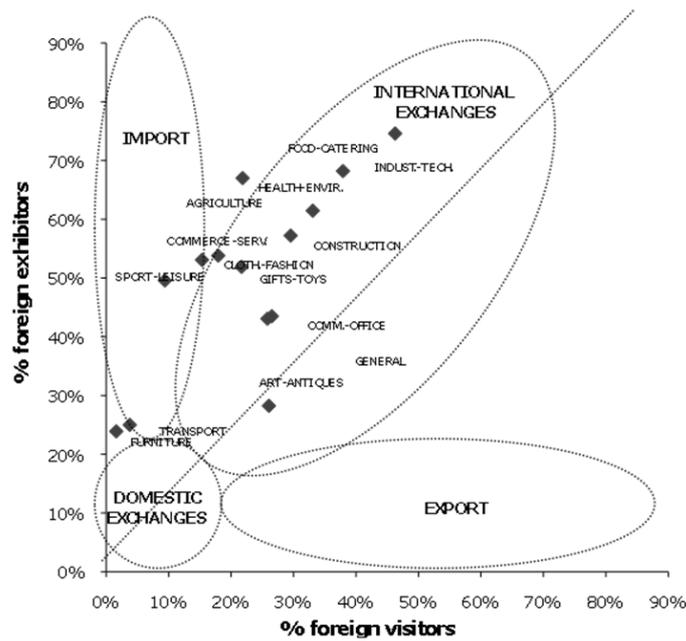


Figure 7: International reach and import-export function of international exhibitions in Germany, by sector (2009-2010) (CERMES 2011a)

However, creating events simultaneously in various parts of the world today is an arduous task for an exhibition organizer, because the local organizers have already developed many initiatives and each new one is met with fierce competition which multiplies the difficulties already inherent in a multinationalization operation. This model requires having contacts in the area of origin but also new relations with producers in the new countries, as well as with the local sales force and structures. Many attempts by small organizers to create new, independent events in developing countries have failed because of excess competition or have been hampered under the burden of organizational difficulties. Instead more appealing spaces have opened up for “support” activities to European exhibitors wishing to participate (individually or collectively) in the new events taking place in recently-developed countries. In some cases, the organizers even enter into agreements

with the local organizers to act as their agents in Europe or country of origin. In this scenario, the needs of exhibitors are no longer of a technical-logistical nature (handled by local organizers), but are increasingly oriented toward communication-relationship with the local markets.

On the other hand, there are new actors who are reaping success in the multinational approach to the events business. They come from worlds in which globalization and transmediality form the foundation of their activities, in response to the demand by businesses for communication. As will be examined in more detail in the section that follows, some have experiences in publishing, e-commerce, the organization of individual events, private sourcing events, and marketplaces. Probably, it is exactly this propensity to think globally and multimedially that helps assess where and which is the best way to enter the event market.

5 Technology: from physical to multimedia

Events, by their very nature, are a form of live communication characterized by the presence, in the same physical space, of many people who interact among themselves. Recently, this has begun to change because the events being offered today span from physical to multimedia, often using various technologies for the same contents, albeit in different contexts.

In the past, many trade fairs tried the 'virtual' path, but unsuccessfully. In the wake of the development of the Internet and the earliest videoconferencing systems, many trade show (and congress) operators feared that virtual events would supersede live events. As a result, many organizers have taken a run at virtual experiences, if only to monitor developments in its progress and build skills for future activities.

An initial flurry of initiatives attempted to exploit web technologies to offer an alternative to live trade show events. Some organizers tried to map a virtual pathway through the halls among exhibitor booths by simply crafting little more than a database of suppliers organized by product type. Later they attempted to create virtual stands. This kind of experimentation quickly lost its appeal mostly due to the slow speeds and the limitations of the technology available at the time, but also thanks to the proliferation of websites that each firm was able to design for itself. A secondary road tried by many trade fair organizers was that of marketplaces and search engines. Once again their journey met with only limited success. More than anything, their problem was the lack of specific technological skills (Chizzoli and Rinallo 2004). In fact, other players with more finely-honed technology skills were successful in their intent, coming up with services quite different from those offered by collective events like e-commerce, online auctions, and search engines. Another type of development was the so-called "service fairs" like job markets, which are primarily a collection of listings for job openings by companies, and CVs from subscribers, or information on the demand for and supply of homes.

More recently, digital technology is being used to complement physical presentations at live events (Figure 8). In the case of individual marketing events by businesses, almost all the live initiatives carry over onto the web and increasingly on social media. This makes it possible to extend the goodwill generated for the brand or the event organizer forward and to extend its reach to a much broader secondary audience due to online buzz. On the other hand, where less conventional communication initiatives are concerned, the live event becomes a mere pretext for the dissemination of news via traditional communication media and through social media networking (Rinallo 2011).

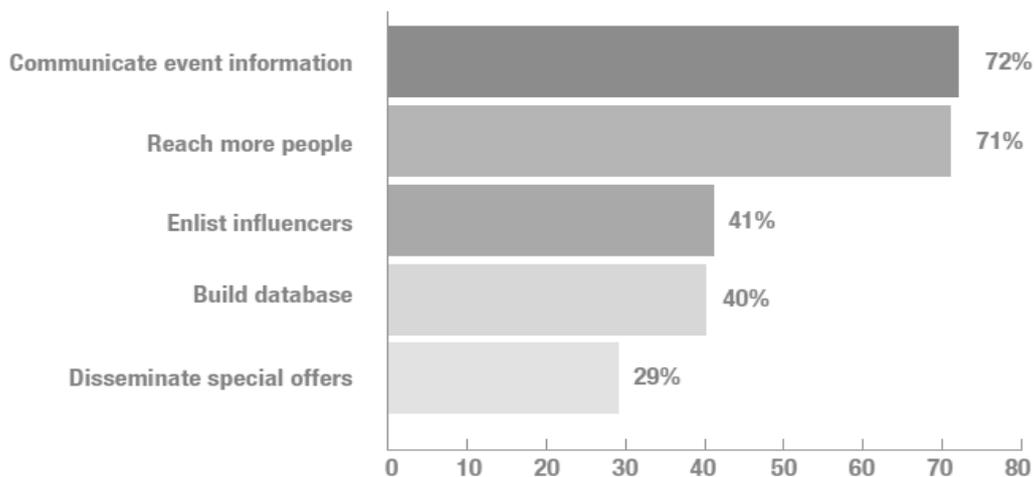


Figure 8: *How social media are used by event marketers (EMI/Mosaic EventTrack 2012)*

Trade show events today make what can be termed conservative use of the new technologies designed to achieve efficiency in providing information and basic services to exhibitors and visitors. Often, these technologies are employed to facilitate booking services, stand design and visualization during the interaction phase with exhibitors or for mapping visitor pathways. In more innovative cases, trade show organizers extend the show through sites that are closed to the public and only open to select visitor-buyers who are given access by the exhibitor firms; the objective is to offer visibility, on a limited basis, to the most innovative products presented during the show. The use of social media by trade fair organizers, beyond first-level solutions (Facebook pages and the likes) especially when organizing business-to-business events, is more limited.

The topic of multimediality does not, however, relate solely to the extension of physical events into cyberspace. The lines of contrast between physical and virtual are blurred if the subject is approached from the point of view of contents that can be utilized through various media, each one with its own potential, and the communities that revolve around these contents. The world of entertainment in particular has developed highly sophisticated practices of this kind tied to the popularity of brands loved by consumers. Given their nature, they can be utilized through diversified media – thus multiplying the proceeds and the profits of the companies involved and their partners. Just think of the Disney empire, which diversified from animated films into classic media (television, comics, books, internet sites, etc.), products like toys, videogames and merchandising, and live experiences like the renowned theme parks and various kinds of events (musical, theme parties, etc.). Experts at MIT have coined an expression to describe this type of evolution, transmedia storytelling (also called multiplatform storytelling) that is, telling stories through different media (Kinder 1991; Jenkins 2003; Jenkins 2006). The idea is not to translate the same story from one means of communication to another but to exploit various media to tell different parts of the same story. The backstory of a secondary character in a film can be revealed through a series of comics and a backstage moment viewed only by completing an online videogame. The ‘real meaning’ of the story is constructed through discussions with other fans on forums and social media, thus shunning official interpretations and those of the traditional media critics.

Applied to trade shows, the theme of multimediality raises the issue of the contents and their potential to be 'spreadable' through different media. For those who have developed strong brands like Mickey Mouse or Harry Potter, the contents are easily spreadable through various media including live experiences and live events, thanks to the loyal consumer base (not by chance called fans, or fanatics) which, in the end, limit the business risk of each new initiative and facilitate the search for funding and qualified partners to involve in the project. Even strong television formats have no difficulty being integrated into the organization of live events. Just think of the concerts and awards ceremonies organized by MTV that have no trouble attracting sponsors from among the many brands that want to tie their names to the world of entertainment (it is no accident that 'branded entertainment' is touted as one of the new marketing trends).

Historically speaking, trade show organizers have developed more skills with the container (that is, the physical space where the show is held) than skills with the content. The latter was left in the hands of exhibitors and in some cases media partners. And yet it is only by becoming "content specialists" that one can hope to 'spread' in a credible manner the content that emerges from trade fairs across the various media such as trade publications, themed TV channels, web portals, publishing, etc. For many organizers, the development of content could be an opportunity to become credible partners in transmedia operations of a different type. Another avenue is the development of relationships with visitors. Especially strong relationships based on satisfaction and trust, rather than the simple ownership of databases containing customer data. Only through such strong relationships can one hope that the communities of consumers and professionals that actually revolve around trade fairs may decide to follow the organizers into initiatives of a different kind.

6 Speculations about new trade show formats in the future

Aspects of the future outlined by the developing trends in the world of events leads us to question if, and to what extent, they need to or can be followed by trade show organizers. A related issue then concerns the skills of the existing collective event organizers and the question whether they will be considered outdated at some point and whether they still hold substantial value.

When reflecting upon trade show events, many would suggest that there is a need for modernization, at least in Europe. But no one really knows where this change will lead to. It is unclear whether new generations can do without live face-to-face contacts or if these will need to be boosted due to the lack of daily contact. Even with social networks, scholars continue to refer to the ambivalence typically underlying initial thoughts about the Internet. Does networking enhance socialization allowing individuals to maintain relationships outside the geographic boundaries that have always characterized relationships and exchange, or does it impoverish the latter, creating superficial interactions that are often insincere and rarely carried forward into the 'real' world (e.g. Kraut et al. 1998; McKenna and Bargh 1999; Coget et al. 2002; Christopherson 2007)?

These are questions that touch society as a whole and that certainly will have significant implications also for the world of communication and marketing events that are still hard to imagine today. In our case, we can only pick up weak signals, like the ones we receive from trade show customers. For instance, exhibitors-investors wish for more individuality and visitors-participants wish for more experiential interaction. We are also faced with digital technology that requires more content in order to be able to provide innovative support and not slide back into existing formats (e.g. marketplaces and search engines).

In fact, the skills required to better keep up with the new individuality of European businesses seem a far cry from the current skills of trade show organizers (see Table 2). The competencies of companies, much more than products, are what allow them to successfully compete and produce innovation. Yet they also represent

the limits encountered by companies in their development process (Prahalad and Hamel 1990). In the case of exhibitions, the growing demand for individuality of businesses and events mainly calls for marketing and communication competencies, content building and enhancement competencies, rather than competencies at organizing space. Furthermore, individuality does not allow the same organization to work for several competitors. Greater creative and communication competencies are also required for development of the experiential marketing model. There is also a demand for better knowledge of the purchase patterns of the customers' customers and the behavior patterns of the respective communities. In short, these skills are largely market-focused (Day 1994). Other gaps have shown up in the local-global driver, such as the need for a multinational organization on the one hand as well as the demand for specialized communications, which requires fewer logistical services but more services of adaptation and understanding of local markets, along with content building. Finally, the multimediability driver entails sophisticated technology skills in order to be able to move freely from the physical to the virtual, but most of all, it still requires making a significant shift from container to content.

Table 2: *The competencies requested by the new drivers (authors' elaboration)*

| | | | |
|------------------------|--|---|---|
| Driver | Collective Information Local Physical | Individual Experiential | Global Multimedia-based |
| Base competency | Logistic- organizational | Communication and marketing | Logistics, communication and marketing |
| Customers | All competitors | Only one company/ few companies per sector | |
| Innovation | Events repeated at same venue | Events that are always different | Adaptation to the market Multibusiness |
| Organization | Local | Local | Multinational Transmedia |
| Revenue model | Space sold | Other services | Other services |
| Focus | Container | Content | Content and technologies |

In summary, the technological skills needed for virtual platforms are of little worth without the knowledge of promotion dynamics and pre-purchase information needs in the underlying sectors. In the same way, the relationships European trade show organizers have established with exhibitors can be called upon to create collective participation in partnership with trade show events in emerging markets. As occurring in Europe, some of the leading events are already 'at war' with each other for dominance at the continental level, and both the relationships and the skills of European organizers in this field could be precious assets. On the other hand, working with those who are used to capitalizing on contents could bring to light some valuable and useful contents for collective events that could also be transferred to digital technologies and multimedia experiences. Ultimately, many of the relationships and competencies of existing collective event organizers can be placed on the bargaining table, and certainly constitute value for possible partnership exchanges; in essence, they could add a few rungs to the ladder of the future.

7 Conclusions

This article sets out to analyze development trends in trade shows and fairs, starting with the changes affecting exhibitor companies (investors in communication), visitors (the audience), market location and technology. These changes have been broken down into collective-individual, information-experience, local-global, and physical-multimedia opposites, highlighting for each of these the directions of the new skills required by organizers.

The new individuality of companies and events mainly calls for marketing and communication competencies, content-building and enhancing competencies, not just space organization competencies. Greater creativity and communication competencies are also required for the development of the experiential model, previously entrusted mainly to the exhibitors. Other gaps have been identified in the local-global drivers such as the need for a multinational organization on the one hand, and fewer logistical services but with more services to adapt to and understand local markets on the other. Last, the multimedia driver involves having sophisticated technological skills in order to be able to span from physical to virtual events, but above all to make a major move from container to contents.

So what are the managerial implications for organizers of trade shows and exhibitions who are faced with such sweeping changes that are in many ways competence-destroying – that is, it can make their existing skills obsolete? An organization cannot set aside its past, nor can it change in an effective way overnight. The main management theories, that have dealt with regaining competitiveness in situations of profound change where the skills of newcomers are rewarded, advise companies to diversify their activities by making investments in the new trends in an experimental fashion in order to acquire knowledge and to be in a position to grasp any opportunities that may arise should the developments become more significant. However, in the case of many exhibition organizers, it seems difficult to see how these investments can actually be made independently without resorting to alliances. From a pragmatic point of view, it seems that the present-day competencies of exhibition organizers are still very valuable and difficult to acquire in the short-term. As such, they become important competencies in partnership agreements with newcomers. The various drivers of change in the exhibition sector analyzed here suggest different forms of cooperation with suppliers to these new businesses – it is up to the exhibition organizers to adopt the right approach in identifying potential partners and developing initiatives to build the business of the future.

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