



International Exhibiting

Trends & Outlook



Skyline[®] **Tradeshow Week**
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An exclusive industry analysis by
Skyline Exhibits & **Tradeshow Week**

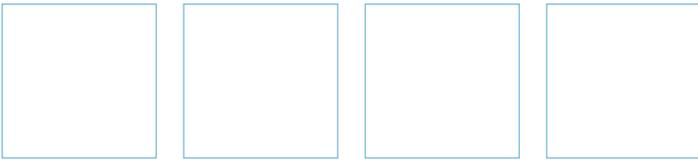


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INTRODUCTION

Skyline Exhibits and **Tradeshow Week** magazine have teamed together to provide this exclusive report on international event exhibiting. The goal of this report is to provide exhibitors with an understanding of the best practices as well as the similarities and differences between domestic and international event exhibiting.

Data in this report has been gathered from a proprietary survey of corporate exhibitors from the U.S., Europe, Asia, and other areas, most with international exhibiting experience who represent a broad range of industries. The detailed findings in this report provide exhibitors with a guide to the decision-making and logistical process of exhibiting internationally.

The report is broken into three core sections:

- **Foreign Events - Exhibitor Survey Results**
This section of the report is viewed from the angle of U.S. exhibitors participating in events outside the U.S. Topics cover everything from event selection to unexpected exhibit costs.
- **Domestic Events - Exhibitor Survey Results**
Findings in this section of the report focus on the importance of marketing to international buyers at domestic events. This section of the report also presents European, Asian, and other international exhibitors with some of the challenges and unexpected costs associated with U.S. exhibitions.
- **Write-In Responses**
Select exhibitor write-in responses are presented in the final section of the report. These valuable comments are the direct feedback offered by exhibitors in regards to their specific advice on exhibiting in international events, as well as the differences and similarities between U.S. and foreign events.

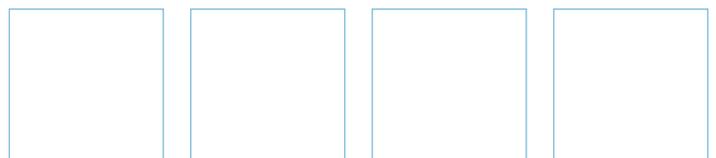
The report analysis will help exhibitors and event marketers analyze the opportunities and challenges associated with international event exhibiting and exhibit design.

Skyline[®]

Skyline Exhibits
3355 Discovery Road
St. Paul, MN 55121
Phone: 1-(651) 234-6592
Fax: 1-(651) 234-6571
www.skyline.com

TradeshowWeek
CUSTOM RESEARCH
FULL-SERVICE MARKET RESEARCH AND CONSULTING

Tradeshow Week Research
6909 East Greenway Parkway
Suite 250
Scottsdale, AZ 85254
Phone: (480) 483-4471
Fax: (480) 483-4457
www.tradeshowweek.com/customresearch



EXECUTIVE SUMMARY

The survey invitations were sent to a specialized group of marketers; many are experienced international exhibitors. Despite the challenges associated with exhibiting overseas, this unique group of exhibitors feel it's both necessary and worthwhile, and are overwhelmingly expanding their international exhibiting efforts.

- Eighty-seven percent of the survey participants exhibited in shows outside the U.S. in the past three years/or have plans to exhibit internationally in 2008.

Importance of International Exhibit Marketing

- Exhibitors who expect to exhibit in "more" foreign events over the next two to three years outnumber exhibitors who expect to exhibit in "less" foreign events more than eight to one.
- Exhibitors are fifteen times more likely to believe exhibiting at foreign events will be "more important" than "less important" over the next few years.
- Exhibitors who anticipate their total exhibit space at foreign events will "increase" over the next two to three years outnumber exhibitors who expect their space to "decrease" more than six to one.
- Most exhibitors (87%) who participated in a foreign event said their results were "better" or "about the same" as their U.S. trade shows.

Foreign Event Selection

- The two criteria cited most often in foreign event selection are:
 1. Attendee demographics: 65%
 2. Geographical regions: 44%
- More than one-third of the exhibitors say they are most likely to add events in Canada (40%) and Germany (36%) to their exhibit schedule; one-quarter of the exhibitors are considering events in China (28%) and other parts of Asia (27%).

Booth Staff and Exhibit Design at Foreign Trade Shows

- About four out of five exhibitors (79%) staff their booth with multi-lingual employees at foreign events.
- The largest cluster of exhibitors indicated that the most effective exhibit structures at foreign events are "Lightweight custom, hybrid exhibits (incorporating both custom and modular elements)" (29%).
- Exhibitors indicated it is best to "Build and store a booth overseas" or "Rent at show location" rather than "Ship a domestic booth."

Marketing to International Attendees at Domestic Events

- Three out of four exhibitors (75%) feel it is more important today to reach international attendees at domestic events than it was a few years ago.
- Exhibitors most often cite "Meetings in the booth" (67%) as the most effective way to reach international buyers at domestic trade shows.
- The three "unexpected costs" that exhibitors most often mention in regard to U.S. exhibitions are:
 1. Materials handling ("drayage"): 66%
 2. Installation and dismantle: 43%
 3. Exhibit transportation: 40%

Respondent Profile

- Exhibitors participating in the survey represent a wide range of industries including: Manufacturing/Industrial: 37%; Computers/Electronics/Technology: 17%; Medical/Healthcare: 12%; Professional and Business Services: 9%; Fashion/Apparel: 3%; Publishing: 2%, and "other" industries: 19%.
- The average budget for exhibitors taking part in the survey is \$456,250 USD.



FOREIGN EVENTS – INTERNATIONAL EXHIBITING SURVEY RESULTS

The following survey findings were compiled from over 340 exhibitors. The survey invitations were sent to a mix of foreign and domestic-based exhibitors. The majority have experience exhibiting internationally.

The survey was conducted in January 2008. The underlying focus of the survey is to compare exhibitor experiences and results overseas to their U.S. exhibit programs.

Impact of Globalization on Business

About three out of four exhibitors (74%) said their company or organization has been impacted by globalization. Whether this means new market opportunities or international competition, the end result is business needs are shifting. Some of the major changes cited by exhibitors include:

- Specializing for different regions.
- More competitors, more options for clients.
- Rapid expansion, remote offices.
- Need to produce products that meet global regulations.
- Increased domestic competition from foreign corporations.
- Cheaper materials, but lower sales costs.
- Outsourcing, off-shoring.
- Focus on exchange rates.

SURVEY QUESTION: Has your company or organization been impacted by globalization, i.e., new market opportunities or international competition?

	Exhibitors
Yes	74%
No	26%

Globalization and the Events Industry

Globalization has reached the events industry. Eighty-seven percent of the survey participants exhibited in shows outside the U.S. in the past three years/or have plans to exhibit internationally in 2008. This percentage is much higher than for all exhibitors, because exhibitors very likely to exhibit internationally were asked to take the survey.

SURVEY QUESTION: Did you exhibit in any shows outside of the U.S. in the past few years or plan to in 2008? (Please choose all that apply.)

	Exhibitors
2005	53%
2006	69%
2007	75%
2008	73%
None of the above	13%



For the most part, exhibit programs are expanding. Four out of five exhibitors (81%) indicated that they have not dropped a domestic event and replaced it with a foreign event.

SURVEY QUESTION: Have you dropped any domestic events from your schedule and replaced them with foreign events?

	Exhibitors
Yes	19%
No	81%

Most exhibitors (87%) who participated in a foreign event said their results were “better” or “about the same” as their U.S. trade shows. The commitment to international exhibiting will continue to rise over the next few years.

SURVEY QUESTION: Please compare your results from U.S. trade shows vs. foreign events. Were your foreign results:

	Exhibitors
Better	20%
About the same	67%
Worse	14%

Over the next two to three years 93% of exhibitors anticipate that their exhibit space will either “increase” or “stay about the same.” The exhibitors who anticipate their total exhibit space at foreign events will “increase” over the next two to three years outnumber exhibitors who expect their space to “decrease” more than six to one.

SURVEY QUESTION: Over the next two to three years do you expect your total exhibit space at foreign events to increase, decrease or stay about the same?

	Exhibitors
Increase	43%
Decrease	7%
Stay about the same	50%



Importance of International Exhibiting in the Events Industry

Exhibitors are fifteen times more likely to believe exhibiting at foreign events will be “more important” than “less important” over the next few years.

SURVEY QUESTION: Do you believe exhibiting at foreign events will be more, less or about as important to your organization over the next two to three years as it is today?

	Exhibitors
More important	62%
Less important	4%
About the same	33%

Exhibitors who expect to exhibit in “more” foreign events over the next two to three years outnumber exhibitors who expect to exhibit in “less” foreign events more than eight to one.

SURVEY QUESTION: Do you expect to exhibit in more, less or about the same number of foreign events over the next two to three years?

	Exhibitors
More	43%
Less	5%
About the same	52%

Foreign Event Selection

Attendee demographics are cited most often as the criteria used to select which foreign events to exhibit in. For many exhibitors selecting events overseas is relatively new, and “tradition”; i.e., exhibiting in the same event annually, does not apply.

SURVEY QUESTION: How do you select which foreign events to exhibit at?

	Exhibitors
Attendee demographics	65%
Geographical regions	44%
Perceived ROI or ROO opportunity	43%
Attendance numbers, projections	40%
Whether competitors are exhibiting or sponsoring	36%
Lead gathering opportunity	31%
Tradition, we exhibit at the same shows annually	31%
Other	9%



It's somewhat misleading to see that the largest cluster of exhibitors (40%) is expanding their exhibit program into Canada. Exhibitors are making bold moves across the globe. Consider that more than one-quarter of the exhibitors are looking at China (28%) and other parts of Asia (27%). Additionally, one out of every five exhibitors indicated interest in adding Dubai (22%) to their exhibit schedule.

SURVEY QUESTION: Which foreign territories are you adding or most likely to consider adding to your event schedule? (Please check all that apply)

	Exhibitors
Canada	40%
Germany	36%
Other Europe	34%
United Kingdom	32%
South America	28%
China	28%
Other Asia	27%
Mexico	26%
France	25%
Japan	22%
Dubai	22%
Italy	20%
Australia	20%
Central America	14%
Other Middle East	12%
Africa	8%
None of the above	12%



Booth Staff at Foreign Trade Shows

Most exhibitors staff their overseas booth with employees from their domestic offices or have some blend of staff from their domestic and overseas offices. About four out of five exhibitors (79%) staff their booth with multi-lingual employees at foreign events.

Very few exhibitors indicated that they go to an outside source to staff their booth overseas.

SURVEY QUESTION: Does your organization send domestic employees to staff the booth at foreign events or do you have overseas staff?

	Exhibitors
Domestic employees staff the booth at foreign events	37%
Overseas staff	25%
Other	38%

Most of the additional write-in responses (95 out of 98) indicated that they staff their foreign event booths with both domestic and overseas staff.

SURVEY QUESTION: Do you staff your booth with multi-lingual employees at foreign events?

	Exhibitors
Yes	79%
No	21%

In general, exhibitors that staff their booth with multi-lingual employees tend to be global organizations. They staff their booths with employees from the event’s host city or region. Exhibitors that do not staff with multi-lingual employees tend to participate in countries where English is common.

Below are a few of the comments exhibitors offered:

Yes - multi-lingual booth staff at foreign events

- “Our company employs people from all over the world, so it is easy for me to staff my booth with multi-lingual employees; however, I do not staff with just employees that speak the language of the country we are going to.”
- “Our sales staff is international. They know other languages.”
- “We are fortunate to have manufacturing facilities in Europe and Asia - we use employees to staff the booth and most of them speak at least 2 languages.”

No - do not use multi-lingual booth staff at foreign events

- “Most of our non-U.S. conventions are in other English-speaking countries.”
- “Only selling into international markets where some English is already spoken by citizens - Scandinavia, UK, Benelux, Australia, New Zealand, Singapore, South Africa, United States of America, etc. (We are a Canadian company who exhibits mainly in the USA.)”



Exhibit Booths and Design

The largest cluster of exhibitors indicated that the most effective exhibit structures at foreign events are “Lightweight custom, hybrid exhibits (incorporating both custom and modular elements)” (29%). Exhibitors also indicated it is best to “Build and store a booth overseas” or “Rent at show location” rather than “Ship a domestic booth.”

SURVEY QUESTION: What types of exhibit structures are most effective in foreign events?

	Exhibitors
Lightweight custom, hybrid exhibits (incorporating both custom and modular elements)	29%
Custom (Full-Scale)	25%
Modular/Portable	22%
“Pop-Up”	16%
Other	8%

SURVEY QUESTION: In your opinion is it more effective to build and store a booth overseas for use at foreign exhibits, rent at show location, or ship your domestic booth?

	Exhibitors
Build and store a booth overseas	39%
Rent at show location	37%
Ship a domestic booth	24%

The top features that exhibitors say they “must have” in their foreign exhibits are:

1. Cutting edge signs/graphics: 65%
2. Bright lighting: 60%
3. Lead capture technology: 41%

Many of the additional comments offered by exhibitors stressed the social aspect of the booth. Common themes included:

- Meeting space is more important, it’s about relationship-building, more time spent with people, and it’s about the social not the hard sell.
- More hospitality, with liquor, coffee, tea, food, and small refrigerator.
- Product samples, new models.



Unexpected Costs and Challenges to International Event Marketing

The number one “unexpected cost” associated with an overseas exhibit campaign is “Booth transportation” (46%). This lends credence to the advice offered by many exhibit managers to “Build and store a booth overseas” or “Rent at show location.”

Exhibitors also voiced concerns about unexpected costs related to:

- Generally higher expenses in European locations.
- Translators.
- Value Added Tax (VAT) and currency fluctuations.

SURVEY QUESTION: What are some of the unexpected costs associated with your overseas exhibit campaign? (Please choose all that apply.)

	Exhibitors
Booth transportation	46%
Hidden exhibit costs	38%
Transportation of display products	38%
Hotel to event transportation	19%
Entertainment	18%
Lost time out of the office/Lost business	18%
Booth storage	13%
Meals	11%
In-booth marketing	4%
Other, please specify	31%



Exhibiting overseas presents a few new challenges for exhibitors to contend with. About one-third of the exhibitors found new challenges in “Transportation/Exhibit tracking and logistics” (37%) and “Language issues” (36%).

SURVEY QUESTION: What are the main challenges that you are facing regarding your international exhibit programs?

	Exhibitors
Internal budget issues	49%
Transportation/Exhibit tracking and logistics	37%
Language issues	36%
Booth staffing issues	23%
On-site labor issues and costs	21%
Material and design costs	19%
Booth design issues	18%
Working with exhibit houses/suppliers	18%
Pre-show promotions	17%
Storage issues	7%
Other	6%



Attendee Marketing at Foreign Events

The two methods that exhibitors most often mention as “effective” in reaching attendees at foreign trade shows are:

1. Meetings in the booth: 68%
2. Pre-show marketing: 59%

SURVEY QUESTION: What are the most effective ways to reach buyers at foreign trade shows? (Please check all that apply.)

	Exhibitors
Meetings in the booth	68%
Pre-show marketing	59%
Host networking events outside the trade show hours	36%
Educational events	29%
Co-locate or Cross-promote with another exhibiting company	28%
Sponsorship opportunities at the event	26%
Unique freebies in the booth	20%
Other	6%



Companies That Have Not Exhibited Overseas

Many of the exhibitors who do not participate in foreign events noted that they are only responsible for sales in the U.S. and Canada while other divisions or branches handle sales in foreign territories.

Some of the exact exhibitor responses that detail the reasons they do not exhibit in foreign events are provided below:

- “Our company has divisions overseas with a separate headquarters. If they decide to exhibit there, we don’t know about it.”
- “Our software product is only written in English currently.”
- “Overwhelming Canadian/U.S. market. No direct need at the moment.”
- “We depend on our overseas suppliers to exhibit.”

For exhibitors that have not exhibited overseas, “New market opportunities” (67%) is mentioned most often as the key reason they would consider overseas exhibitions.

SURVEY QUESTION: What are some of the key reasons you would exhibit overseas?

	Exhibitors
New market opportunities	67%
If it was less expensive	15%
If our competitors exhibited overseas	12%
Direct invitation from foreign event producers	12%
Other	9%



DOMESTIC EVENTS – INTERNATIONAL EXHIBITING SURVEY RESULTS

This section of the report provides insight to international companies and organizations exhibiting in the United States. It also studies best practices to reach international buyers and attendees who visit domestic events.

Exhibitors indicated that about one-third (29%) of their domestic events have an international audience, i.e. the event draws at least 5% of the attendees from overseas.

SURVEY QUESTION: About what percentage of your U.S. trade shows scheduled in 2008 are:

Type of Domestic Events	Average Percentage of Trade shows
Regional	24%
National	47%
International (drawing at least 5% of attendees from overseas)	29%

Marketing to International Attendees at Domestic Events

Three out of four exhibitors (75%) feel it is more important today to reach international attendees at domestic events than it was a few years ago.

SURVEY QUESTION: Do you feel it is more important today to reach international attendees at domestic events than it was a few years ago?

	Exhibitors
Yes	75%
No	25%

Below, in their own words, are some of the reasons why exhibitors suggest it has become more important to reach international attendees at domestic shows:

- “Globalization either works for you or against you - you need to know what is happening out there.”
- “Less expensive to have them come to us.”
- “Many times an international relationship starts domestically.”
- “More and more international companies seem to be attending domestic meetings.”
- “Most companies are not aware of the large international presence at domestic shows.”
- “Visitors travel a long way and deserve to feel welcome.”

Exhibitors are split fairly evenly on whether they staff domestic booths with multi-lingual employees in an effort to reach international attendees (49% Yes, 51% No). Below are some of the reasons exhibitors provided either for or against staffing domestic booths with multi-lingual employees.

Yes - staff domestic booth with multi-lingual employees

- “Improve communications.”
- “To give the impression that we are a global company with local presence.”
- “Too many lost opportunities in the past.”

No - do not staff domestic booth with multi-lingual employees

- “English is spoken at all shows.”
- “English is not a barrier to doing business.”
- “If the event is held in North America it is assumed the attendee will be able to converse in English”
- “No such employees available.”

SURVEY QUESTION: Is your organization staffing domestic booth(s) with multi-lingual employees in an effort to reach international attendees?

	Exhibitors
Yes	49%
No	51%

Exhibitors most often cite “Meetings in the booth” (67%) as the most effective way to reach international buyers at domestic trade shows. Other important methods include “Educational events” (39%) and “Host networking events outside the trade show hours” (31%).

SURVEY QUESTION: What are the most effective ways to reach international buyers at domestic trade shows? (Please check all that apply.)

	Exhibitors
Meetings in the booth	67%
Educational events	39%
Host networking events outside the trade show hours	31%
Sponsorship opportunities at the event	25%
Co-locate or cross-promote with another exhibiting company	16%
Unique freebies in the booth	13%
Other	13%



Exhibitors also discussed what they're doing differently this year to draw international professionals to their domestic booths. Many exhibitors mentioned additional pre-show emails and advertising. Some of the specific ideas included:

- "Advertising in European trade journals."
- "Developing pre-show campaigns earlier to target international delegates. They need longer lead times - with Visa, travel, etc."
- "Displaying our international affiliates' info."
- "Offering units that comply with European specifications."
- "Translating literature."

Unexpected Costs of Exhibiting in U.S. Events

The three "unexpected costs" that exhibitors most often mention in regard to U.S. exhibitions are:

1. Materials handling ("drayage"): 66%
2. Installation & dismantle: 43%
3. Exhibit transportation: 40%

"Drayage" is included with booth space in many other countries, so foreign exhibitors coming to the U.S. are surprised when they discover it. Also, in the U.S. "Installation & Dismantle" of exhibit booths is usually handled by unionized labor.

SURVEY QUESTION: What are the unexpected costs foreign exhibitors should be aware of if they plan to exhibit in the U.S.? (Please choose all that apply.)

	Exhibitors
Materials handling ("drayage")	66%
Installation & dismantle	43%
Exhibit transportation	40%
Electricity	36%
Furniture rental	27%
Booth decor	21%
Exhibit space	20%
Telecommunications	20%
Staffing	15%
None of the above	12%

WRITE-IN RESPONSE

The write-in responses presented in this section of the report provide direct feedback from the exhibitors. Topics include:

- The “one piece of advice” exhibitors would offer their peers who are planning to participate in a foreign event.
- Similarities and differences between exhibiting in U.S. versus foreign territories.

SURVEY QUESTION: If you could give one piece of advice to a U.S. exhibitor planning to participate in a foreign event, what would it be?

Perhaps the most important piece of advice is to allow additional time for planning. Exhibitors emphasize the need to plan ahead and plan early. Some of the other recurring themes offered by exhibitors included:

- Must have a local person for assistance and language help.
- Research and learn about the culture and market.
- Shipping and customs paperwork is very hard.
- Visit the show before you exhibit there.

Below, in alphabetical order, is the advice exhibitors would offer their peers who are planning to participate in a foreign event.

Comment Number	If you could give one piece of advice to a U.S. exhibitor planning to participate in a foreign event, what would it be?
1	1. Start planning your booth early. Every country has different policies and practices for exhibitors and their booths. 2. In the U.S. we use our pop-up display, while overseas the show provides our exhibit walls. This affects how you hang your signs and what materials you use. 2. Try to exhibit in a U.S. pavilion if available. They provide tremendous help for exhibitors.
2	Adapt to the region, avoid too U.S. centric message, tone, etc.
3	After carefully choosing the show, begin the exhibiting process at least 9 months in advance.
4	At first study the market and the cultures of each country.
5	Attend shows before deciding to exhibit.
6	Be aware of shipping requirements/customs.
7	Be aware that there are sometimes unique requirements in certain international markets, and be somewhat versed in U.S. regulations covering foreign business (i.e. Foreign Corrupt Practices Act).
8	Be knowledgeable of the other countries customs and traditions.
9	Be prepared for the unexpected. For example lack of air conditioning in European trade halls. Understand the local customs.
10	Be prepared to exhibit as a local company. Have promotional materials and booth signage in local language. Booth should be staffed with personnel who speak the local language.
11	Bring a local person into the planning process to understand customs, culture, etc. Use an exhibit company!!!
12	Check into customs and shipping in the country you are shipping to. Sometimes countries will hold materials for a longer time, or be sensitive to certain materials, which you may not think would cause concern.
13	Definitely limit shipping anything - very costly. Consider the “Build and Burn” booths. More bang for your money. Adapt to the region, avoid too U.S. centric message, tone, etc.



Comment Number	If you could give one piece of advice to a U.S. exhibitor planning to participate in a foreign event, what would it be? (continued)
14	Do a lot of pre-show homework on the culture and speak to exhibitors from the prior year if this is the first time your company is participating.
15	Don't plan on getting your V.A.T. refund. Treat it as expenditure when paid and a windfall if you get it back.
16	Ensure that you have double checked shipping, visas, hotels, flights and transportation. And ensure you keep an open dialogue with your stand contractor and the organizer of the event you are exhibiting at, also make sure you are working with a strong PR focus.
17	Ensure you have someone that speaks the language. Using the help of a distributor at a foreign event is very useful.
18	Exhibit and conduct booth staffing following foreign cultural expectations; e.g. wear suit and tie in Europe.
19	Get a VERY GOOD customs broker with global experience.
20	Have a separate booth in each location to cut down on shipping expense and headache.
21	Have at least one piece of literature in the native language at the event.
22	If you are not familiar with foreign events, it's been beneficial to us to exhibit in the U.S. pavilion. I also had someone design, install and breakdown our exhibit instead of shipping and overseeing installation.
23	Leave patriotism at home... When in Rome....
24	Make sure you are prepared for different electrical currents with adapters, converters, etc.
25	Make sure you have a broker to get your products and booth properties through customs.
26	Make sure you have a firm understanding of not only how they conduct their trade shows (hidden costs that are traditionally not experienced in the U.S.) as well as research the countries standards of "doing business" (everything from greeting on the booth to their business customs).
27	Can't say enough about shipping and customs - can be a real headache if you don't plan.
28	People abroad do not enjoy the shark mentality of the U.S. Stay cool and let them come to you.
29	PLAN AHEAD - CONSTANT FOLLOW UP.
30	Plan for language barriers and VISA requirements that cause delays in the registration/organization process.
31	Plan well in advance, especially with freight. It can be difficult to get your shipments cleared through customs if you don't work with a knowledgeable freight company.
32	Read the rules, and then read them again.
33	Rent onsite if you don't have in-country exhibit booth and equipment.
34	Research, research, research. Foreign shows are NOTHING like the U.S. shows you've been doing for years. The people, the process, and the activities are completely different.
35	Ship as little as possible, the customs paperwork is horrible!
36	Use a U.S. sponsored pavilion if available as this is an easier way to start.



SURVEY QUESTION: In your experience what are the biggest SIMILARITIES between exhibiting in the U.S. vs. foreign territories?

Similarities between domestic and foreign events include:

- Similar exhibiting goals.
- Similar attendee interests, such as wanting to know about products.
- Similar value of face-to-face medium.

The following comments are a sampling of the responses offered by exhibitors.

Comment Number	Survey Question: In your experience what are the biggest SIMILARITIES between exhibiting in the U.S. vs. foreign territories?
1	A smile is translated in all languages – so helpful, friendly booth staff is crucial.
2	All audiences, regardless of event location, want to talk to a technical expert, not just a sales guy. They also want to see, touch and study your hardware (i.e. your products) ... so don't just show up with a presentation on a plasma screen—bring products to display.
3	All of our exhibits have the same basic purpose - increase brand awareness and identify new business opportunities.
4	Almost all countries speak enough English for business transactions.
5	Attendees come to learn and see what's new. So you need a booth that is inviting, but you want one that will keep them in your booth with activities (i.e., quiz, challenge, etc.)
6	Face-to-face interactions inspire trust and confidence and often cement an opportunity.
7	For the shows we have attended, you would be hard-pressed to identify where the show is taking place once you are in the exhibition hall. The booth set-ups, overall look and hours seem to be the same wherever you exhibit.
8	Importance of pre-show communications to drive booth traffic and setting up meetings in advance with key contacts.
9	In both areas people are looking for solid information from a professional, knowledgeable staff.
10	It all comes down to the product; it doesn't matter where you are the message stays the same.
11	Mainly same type of customers - attendees hungry for information and what's new.
12	Most people speak English. Thought while in Germany I should have had everything translated, but it was an international show and graphics/promotional materials in English were fine.
13	Once on the floor - besides language - very similar.
14	Our target audience has similar interests; our products fill the same needs.
15	People are all there to learn about the products offered and advances in the industry.
16	People are interested in services and products that help them grow and succeed.
17	People are people no matter where they are, and things go wrong anywhere.
18	People are the same but overseas it seems shows are more important in the buying decision.
19	Product interest.
20	Product is the same, and messaging tends to be similar, but with nuances. Set up is the same.
21	Product presentation.
22	Same goal for exhibitors - create new leads and meet with existing customers.



Comment Number	Survey Question: In your experience what are the biggest SIMILARITIES between exhibiting in the U.S. vs. foreign territories? (continued)
23	Show booths and conference venues are often nearly indistinguishable from those at American shows (with exceptions). And everyone is trying to do the same things: put on a good face and attract customers.
24	The formats are similar; the international events are more social-driven. But logistics in the U.S. events are more turnkey.
25	There seems to be a lot of people traveling overseas to other shows, therefore we are getting a lot of international customers at domestic shows & a lot of domestic customers at international shows.

SURVEY QUESTION: In your experience what are the biggest DIFFERENCES between exhibiting in the U.S. vs. foreign territories?

Some of the key differences exhibitors noted in foreign territories vs. their U.S. shows include:

- Costs and services.
- Cultural differences.
- Language.
- Relationship-building vs. sales.

Below are some of the exhibitor comments regarding the biggest differences between exhibiting in the U.S. vs. foreign territories.

Comment Number	In your experience what are the biggest DIFFERENCES between exhibiting in the U.S. vs. foreign territories?
1	1.) No managed logistics. In most countries, the first truck in is the first truck unloaded, and same on the dismantle. 2.) Service levels at exhibition venues vary w-i-d-e-l-y. Some are great - responsive and collaborative. Others - not so much. 3.) NO LEAD SCANNERS WITH PRINT OUT CAPABILITY!!!!
2	Attendee demographics, learn-vs.-buy.
3	Attendees expect to be invited to on-site or off-site events for your company. A cocktail reception on stand is almost mandatory internationally. Meetings are always scheduled on stand.
4	Booths - in foreign markets booth set up is more like individual rooms.
5	Booths are often built and burned instead of stored. Also, hospitality is a huge part of shows.
6	Cost is the biggest difference. Travel, shipping, and currency exchange can be cost-prohibitive for attending a foreign show.
7	Displays in Europe have less emphasis on products and more on networking.
8	European shows are more formal. Leads are more qualified.
9	Europeans tend to favor informative clean displays over the gimmicks seen at a lot of U.S. shows.
10	Exhibit hours are longer outside the U.S. making for less stressed visitors.
11	Exhibiting in foreign territories requires more socializing. While the actual event may be formal, don't be fooled by the seeming informality of post-exhibit social events.
12	Food/beverage on stands overseas, no union labor, no drayage, raised floors, build & burn, easier to get things done, MUST order all services in advance.
13	For our industry, oil & gas, overseas shows are more formal--audiences wear suits and ties so American companies whose booth personnel show up wearing golf shirts stand out like a sore thumb. International events require more "schmoozing" and face-time with executives, so make sure that you have conversational areas in your booth.



Comment Number	In your experience what are the biggest DIFFERENCES between exhibiting in the U.S. vs. foreign territories? (continued)
14	Foreign territories are more lenient in what you can do on the show floor (hand out brochures outside of your space), the organizational part of the exhibits - foreign territories seem to wait until the last minute to do anything, but in the U.S. there is more pre-planning done.
15	Foreign trade shows seem to have more custom-built booths for that particular show, more socializing in the booths, shows are longer in duration.
16	In the U.S. you have to deal with overpriced, low quality union labor vs. the lax attitude of underhanded foreign labor.
17	Inter-personal relationship building.
18	It seems foreign territory exhibits are less about a flashy booth appearance and more about relationship building.
19	Labor is generally cheaper. People will actually READ your graphics rather than just glance at them as in the U.S. Certain colors can actually be an insult in some cultures (white, the color of death in many Asian cultures for example).
20	Labor requirements. Internationally you can do just about anything you want in your booth except hook up your power to the main.
21	Logistics, language issues, communication from the U.S., culture (abundant labor in China, nudity in Germany), costs vary greatly.
22	Many more types of shows to choose from in the U.S., often with less hassle and overhead required to show your stuff. In Europe it's hard for smaller companies to exhibit. Shell scheme booths are often mandatory in the smaller booth sizes, and pricing is exhorbinate, and there are fewer events to choose from.
23	More small meetings, more VIPs attend events, build-and-burn booths overseas.
24	More time in the booth at overseas shows.
25	No labor unions in the foreign territories. Costs are a little better.
26	People in Europe expect appointments and will not usually stumble across your trade show booth or product.
27	Pricing! International booth space and booth amenities are more expensive.
28	Rental vs. ownership of stand.
29	Restrictions seem to vary depending on location - it's very important to read the exhibitor manual carefully!
30	Security can be better or worse than in U.S. shows; watch out. Exhibit spaces in other countries usually have walls while in the two major shows in our industry in America, booths have only low stanchions between them.
31	Serving food and beverages in the booth. Booth properties outside of the U.S. aren't used as much. Booths are more disposable.
32	Stands vs. booths.
33	Stronger leads come out of foreign events.
34	Supplying food or drinks in a booth in Europe is much more of a norm than in the U.S.
35	The booths are different. U.S. booths are large and more open, European booths are small with walls.
36	The way material handling is handled in the U.S. versus international. Hotels in Europe are also quite different than in the U.S. (i.e. double/single room versus king bed or two double beds).
37	The way the unions work, over there it is very free and liberal, drinking and smoking while operating forklifts.
38	Units of measure, terminology, VAT tax.



METHODOLOGY AND RESPONDENT PROFILE

In January 2008, *Tradeshow Week* Research invited 5,604 exhibitors to participate in a research survey focused on international event marketing. The invitations were sent to a select group of exhibitors believed to have international exhibiting experience. This group enhanced the value of the responses by offering insight based on personal experiences.

The invitations were sent via email and 342 exhibitors responded for a 6.1% response rate.

Exhibitors participating in the survey represent a wide range of industries including:

- Manufacturing/Industrial: 37%
- Computers/Electronics/Technology: 17%
- Medical/Healthcare: 12%
- Professional and Business Services: 9%
- Fashion/Apparel: 3%
- Publishing: 2%
- Entertainment & Broadcasting: 1%
- Food/Beverage: 1%
- Transportation: 1%
- Other: 16%

The average budget for exhibitors taking part in the survey is \$456,250 USD.

2008 Trade Show Budget	Exhibitors
Less than \$10,000	3%
\$10,000 - \$24,999	6%
\$25,000 - \$49,999	10%
\$50,000 - \$99,999	12%
\$100,000 - \$249,999	28%
\$250,000 - \$499,999	15%
\$500,000 - \$749,999	7%
\$750,000 - \$999,999	7%
\$1,000,000 - \$2,500,000	8%
More than \$2,500,000	4%

Skyline Exhibits and **Tradeshow Week** developed the survey and analysis in this unique industry report. The data reflects the input of over 340 corporate exhibitors surveyed in 2008. The research-based report was designed to assist exhibitors with their international exhibit programs. In addition to this International Exhibiting report, **Skyline Exhibits** and **Tradeshow Week** have co-authored a series of reports on specific industries with a focus on exhibit marketing and best practices in exhibit design. Specific industries studied include Manufacturing & Industrial, Medical and Healthcare, Information Technology, and Professional and Business Services. Also completed is "The Trend to Custom Modular Exhibits". To access these reports, please go to www.skyline.com/whitepapers.



Skyline[®]

Skyline Exhibits

3355 Discovery Rd. • St. Paul, MN • 55121
Phone: 1-(651) 234-6592
Fax: 1-(651) 234-6571
www.skyline.com

TradeshowWeek
CUSTOM RESEARCH
FULL-SERVICE MARKET RESEARCH AND CONSULTING

Tradeshow Week Research

6909 East Greenway Parkway, Ste. 250 • Scottsdale, AZ • 85254
Phone: (480) 483-4471
Fax: (480) 483-4457
www.tradeshowweek.com