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HOW CAN A DESTINATION ATTRACT AND RETAIN LARGE SCALE EXHIBITIONS?

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ABSTRACT

This explorative study employs a qualitative method to analyze destination and venue features that attract and retain large scale exhibitions from the perspectives of exhibition organizers, exhibitors and visitors in the context of China's exhibition industry development. Findings indicate focus and gaps of perceptions among different perspectives. The research has implications for destination management parties when making key decisions in order to optimise financial and human resources on those factors that can best improve attractiveness.

Keywords: exhibition, destination, China, interviews

INTRODUCTION

The exhibition industry is a booming industry worldwide. According to the Global Association of the Exhibition Industry (UFI), the largest international exhibition industry association that is represented in 206 cities in 84 countries, there were 1,062 venues with a minimum of 5,000 sqm of indoor exhibition space worldwide in 2006, with a total indoor exhibition space of 27.6 million sqm. The USA, Germany, China, Italy and France are the five top countries in terms of capacity, accounting for 58% of the world total (UFI, 2007).

China has experienced rapid development in the exhibition sector during the last two decades. China's indoor exhibition space amounted to 2,516,581 sqm in 2007, the third highest in the world after the U.S. and Germany (UFI, 2007). There are over 240 large exhibition centers in China, 16 of which have more than 50,000 sqm indoor exhibition space 2004 (Shen, 2005, cited in Kay 2007). And there are still more projects in the pipeline. Many provincial and municipal governments regard the exhibition industry as a target pillar industry. Centers having over 5,000 sqm indoor exhibition spaces are present in all major cities in China. Rapid development of the exhibition sector has exerted considerable positive impact on destination development via development of the industry and the multiplier effect.

However, concerns about overdevelopment and overcapacity are not uncommon. The average utilization rate of exhibition centers is only about 15% (Kay, 2007). Although many exhibitions have a large number of visitors, the quality of visitors is frequently questioned. Too many venues, venue management quality, trade fair management quality, copycat shows, replication shows in second and third tier cities are some of the major issues affecting China's exhibition industry development. Attracting quality and large-scale events is thus a challenge for many venues and destinations in China. Competition among destinations for exhibitions is getting more intensive. Hence a research question is proposed: How can a destination attract and retain large-scale exhibitions?

Commentators have postulated that destinations exert significant impact on the success of an exhibition event (Rubalcaba-Bermejo & Cuadrado-Roura, 1995; Fuchslocher, 2005), but no empirical studies scrutinize the effect of destination factors on exhibition development, especially from different

stakeholders' perspective. In tourism destination studies, as well as convention destination studies, destination factors that influence the decision of tourists, meeting planners, and meeting participants have been well researched (Cracolici & Nijkamp, 2008; Chacko & Fenich, 2000; Crouch & Louviere, 2004; Oppermann, 1996). Bearing the similarities and differences among tourism destination, convention destination, and exhibition destination, the purpose of this paper is to use qualitative interview methods to confirm the validity of applying tourist destination site-selection and convention site-selection factors into measuring destination attractiveness in the exhibition setting. It also aims to discover main concerns of exhibitors, visitors and organizers regarding exhibition destination, so that significance of destination factors on exhibition industry development can be corroborated. This paper is actually a preliminary section of a series of studies which aim to examine factors that contribute to exhibition brand preference from different perspectives: organizer, destination, venue and exhibition participants.

LITERATURE REVIEW

A destination is identified as an 'experience supplier' by Ryan (1991, 1997), and regarded as a brand name of a place that binds the different products and services provided by a destination together. Destinations can be divided into leisure travel and business travel destinations. Business travel can be further broken down into promotable and non-promotable business trips. Promotable trips comprise of three kinds: trips to trade fairs and exhibitions, trips to conferences and congresses, and incentive trips (Hedorfer & Todter, 2005, p. 119).

The success of leisure travel destinations depends on the attractiveness of destination attributes to leisure travelers (Cracolici & Nijkamp, 2008). Destination attractiveness, choice and competitiveness have been mainstream topics of leisure tourism studies (Gomezelj & Mihalic, 2008; Pike, 2002).

Regarding business travel destinations, a number of authors have discussed convention destinations, including destination image, choice and selection (Chacko & Fenich, 2000; Crouch & Louviere, 2004; Oppermann, 1996). These studies have identified convention site (destination) selection variables and their relative importance. Crouch & Ritchie (1998) identified key site-selection factors for meeting planners as accessibility, local support, extra-conference opportunities, accommodation facilities, meeting facilities, information, site environment and other criteria. Crouch & Louviere (2004) used cost of venue, food quality, plenary room, on-site/off-site accommodation, and participant proximity in their empirical studies. Lee & Back (2008) confirmed that convention site-selection has a significant, positive impact on convention brand satisfaction and attitudinal brand loyalty.

Several commentators have discussed how exhibitions contribute to destination development (Clement, 2005) and how destination factors influence the cultivation of exhibitions (Chan, 2005; 2008; Rubalcaba-Bermejo & Cuadrado-Roura, 1995). Rubalcaba-Bermejo and Cuadrado-Roura (1995, p.387) found that "A whole set of widely varying reasons explains why some regions and cities are more attractive fair and exhibition hosts than others: tradition and history; local income and population; infrastructure and communications availability; location; tourism, environmental and weather condition; public investment and support policies; the city's international standing; exhibition centre size; and the composition of regional industry."

Traditionally, the place factor in hosting exhibitions is phrased as "location" of the exhibition and opinions on if "location" and its attributes influence exhibition participation and development are not in consent (e.g. Alles, 1989; Fuchslocher, 2005).

Some authors believe that the success of an exhibition is in no way affected by its location (Alles, 1989). Hiller (1995) argued that large conventions are attractions in themselves, with location and setting of secondary importance, due to delegates' "commitment to the purpose of the convention" regardless of location (Hiller, 1995, p.375). He considered issues such as accessibility more important than the attractiveness of the surrounding site (Hiller, 1995). Alles (1989) argued that the location of an

exhibition is not so critical to visitors, but it is a significant factor of importance to exhibitors, as distance, climate, ethnic, linguistic, economic and historical links extend influence on exhibitions.

Other authors believe that location has a major effect on attendance, and regardless of the type of exhibitions, attendance is the key to success (Fenich, 2008, p.136). Tanner and colleagues (Tanner et al. 2001) and Berne and Garcia-Uceda (2007) concluded that location and time are influencing variables for visitors. Exhibition planners and organizers should select locations that are easier for audiences to accept and provide every ease for attendance. Fuchslocher (2005) indicated that 'location' has considerably influenced the success of exhibitions. He found that "the location factor earns few plus points, but if there were any problems resulting from it, exhibitors would react both immediately and negatively" (Fuchslocher, 2005, p. 295). Hedorfer and Todter (2005, p.119) are among the few who initiated the usage of the term 'destination' to refer to exhibition host cities or towns. They stated that "in 2003, Germany was the leading destination in the world for trade fairs and the third most popular destination in Europe for congresses and conferences" (Hedorfer & Todter, 2005, p.119). Ulrich (2005) also recommended that organizers analyze the attractiveness and flair of the exhibition center and urban environment delivered when analyzing competition among trade exhibitions. Bauer (2005) and Rubalcaba-Bermejo and Cuadrado-Roura (1995) stressed that exhibition success is closely related to the host city economic and social environment and city capacity.

However, no study has empirically examined to what extent destinations exert influences on decision-making of critical stakeholders of fairs and exhibitions, namely the organizers, visitors and exhibitors, relating to the staging of, participation and repeat participation in exhibitions.

An exhibition brand is consisted of three elements: the event itself, operator who organizes fairs and events at various locations, and the exhibition center (Sasserath, Wenhart and Daly, 2005). However, no extant academic study has taken a holistic approach to examine exhibition brand from all four critical aspects, and how each of the aspects influences customer event satisfaction and future behavioral intentions. This research aims to fill in this gap by drawing theoretical support from tourism and convention literature to identify destination factors that contribute to exhibition brand development.

In this study, the term "exhibition" refers to all kinds of trade shows, trade fairs, exhibitions and expositions, regardless of the subtle differences interpreted by different sources. Exhibitions in this study exclude various forms of festivals, conventions and all-year round show markets.

METHODOLOGY

This explorative study employed a qualitative method to analyze destination factors that attract and retain large scale exhibitions from the perspectives of exhibition organizers, exhibitors and visitors in the context of China's exhibition industry development. Qualitative studies are especially appropriate in understanding the cognition, affect, intentions and the alike from the participants' perspectives (Maxwell, 2005, p22). They explore how participants make sense of events and how these affect their behaviour. In addition, a qualitative method has an inherent openness and flexibility that allows a researcher to modify the design and focus during the research to understand new discoveries and relationships (Maxwell, 2005). This study aimed to draw on qualitative data to 1) explore the cognition of organizers, exhibitors and visitors, and formulate a list of factors that influence their exhibition destination preference and choice, for which no established instruments exist; 2) provide an empirical grounding for the emergence of relations between variables which cannot readily be hypothesized based on extant exhibition and tourism literature.

In-depth interviews were conducted. Interviewees are 1) executives from five exhibition companies with a variety of ownerships; and 2) exhibitors and visitors, who attend exhibitions staged in China. Face to face interview methods were chosen. Organizers were either interviewed in their offices or at an arranged place; exhibitors and visitors were interviewed onsite while they were conducting exhibiting and visiting activities.

An interview guide was developed, with questions covering following aspects of a destination: geographical location, accessibility, city prestige, accommodation, physical environment, economic

environment, population and people, tourism conditions, and exhibition venue and facilities. This interview guide was used flexibly during the interviews.

Interviews with exhibitors and visitors were conducted in four major exhibitions in China. These trade fairs are: 1) The 105th China Import and Export Commodity Fair (Canton Fair) organized by China Foreign Trade Guangzhou Exhibition Corporation staged from 15th April to 7th May; 2) China Ceramics organized by China Council for the Promotion of International Trade Building Materials Sub-Council, China Ceramics Industrial Association, and Unifair, a private exhibition company based in Guangzhou, staged from 2-3 June, 2009; 3) Guangzhou Lighting Fair, organized by Guangya Messe Frankfurt, a joint venture exhibition company, on 9-11 June; and 4) Wind Power Asia, jointly organized by Koelnmesse, Unique International Exhibition Limited, and China Machinery Enterprise Management Association (CMMA) on 8-10th July, Beijing.

The purpose of conducting interviews in these different trade fairs in different locations is to achieve triangulation in sampling. These exhibitions have varying ownership, and hence diversified business model and target participants. Some trade fairs were organized by quasi-governmental divisions; some by Sino-foreign joint venture companies which was a merge between a private Chinese company and a famous international exhibition company; some by joint cooperation between quasi-government divisions, industrial associations and foreign companies. This diversity of ownership and operation paradigm may have varying impacts on fair quality and management perceived by exhibitors and visitors. Also the four trade fairs have different orientations in terms of focus. Some shows were mainly import-oriented and some were export-oriented, bringing in visitors from different parts of the world. The interviewer also tried to conduct interviews in different locations (Guangzhou and Beijing) so that different exhibition centers and locations are reflected in the perceptions of the interviewees.

As per interview with exhibitors, a single exhibiting firm was treated as a unit of analysis. For most of the times, a senior manager (or business owner) from one exhibiting stand was the target interviewee; for rare occasions, several employees helped answer with the questions. Regarding visitors, individual visitors as well as those who visited trade fair in couples or groups were approached. But visitors who hang out together were treated as one interviewee, not as multi-entities.

Altogether 42 semi-structured/in-depth interviews were conducted in four major exhibitions staged in Guangzhou and Beijing, and five interviews were conducted with organizers. All interviews were tape-recorded and transcripts were conducted corresponding with the completion of interviews. Data is then analyzed using the content analysis method.

FINDINGS

Interviewee Profile

Interviews with exhibitors and visitors were conducted onsite at exhibitions. Most of the interviewees hold high positions in their specific organizations. Many interviewees are business owners and managing partners, although some are from small and medium sized companies. Other interviewees are senior and middle management staffs who either lead sales and marketing department or the production department. These middle and senior management personnel are very familiar with their products and sales. Almost all the exhibiting companies have exhibited more than twice in the interviewed trade fairs. It is the same with most of the visitors. In terms of country of origin, interviewees are from a wide diversity of regions, including Brazil, Canada, USA, Turkey, Russia, Italy, UK, Germany, Denmark, Austria, Morocco, India, Hong Kong, and Pakistan. Chinese domestic exhibitors and visitors also cover a wide area of China, including Shandong, Beijing, Guangdong, Northeast China, Anhui, and Shanghai. Average interview time was around 15 minutes. There were many more male interviewees than female interviewees because most of the booth staffs with higher managerial positions are males. Table 1 is a brief summary of the interviewed exhibitors and visitors profiles.

Apart from interviewing exhibitors and visitors, the interviewer conducted interviews with five organizers. These five organizers are managing director or senior director of their specific

organizations. They have many years of working experience in the exhibition industry. Two interviews were conducted in English; three in Chinese. Average interview time was about 60 minutes each.

Interviewees were asked to discuss the importance and preference of the following aspects of a destination – geographical location, accessibility, city prestige, accommodation, physical environment, economic environment, population and people, tourism conditions, and exhibition venue and facilities.

Table 1
 Profiles of the Interviewed Exhibitors and Visitors

No. of Interviewees	Total	42
	international visitors:	9
	international exhibitors	18
	domestic exhibitors	15
Region of Origin	North/South America	5
	Europe	16
	Africa	1
	Asia	5
	Domestic	15
Gender	Male	38
	Female	4
Age	20-30	3
	31-50	36
	>51	3

Venue Facilities

Although being two entities, for only a limited number of exhibition companies own large-scale, purpose-built venues and most exhibition organizers rent space from exhibition centers, organizer on-site services, venue on-site services, and logistic services are always being seen as one by exhibitors and visitors. Venue facilities and service quality will affect participants' satisfaction of the event experience and their satisfaction of the organizer performance.

Following venue facilities frequently stated by the interviewees: phone lines, free water, free paper in restrooms, security, wireless internet connection, sufficient money changing machines, food courts that provide varieties of food, clean booths, spacious hall and hallway, less stairs, air-conditioning, clean restrooms. Most of these features are in consent with previous literature, e.g. Breiter& Milman (2006) has discussed about attendees' needs and service priorities in large convention centers and their category of facility features, in order of importance, are: signage, restrooms, phone signal, seating, foodservice, parking, taxi service to and from the convention center, business services, internet access and others. In this study, interviewees frequently stressed features such as spacious hallway, less stairs, air-conditioning etc. In terms of services, security, cleanliness, provision of basics (such as free water and restroom paper) was expected from exhibitors, but to a less extent from visitors.

Apart from interior facilities and services, accessibility to the exhibition center from airport or hotel is very important for both exhibitors and visitors. Both exhibitors and visitors highly appraise provision of shuttle buses by either hotels or exhibition organizers to drive them to and from the venue. On events that do not provide shuttle buses, participants, especially international ones, use more frequently taxi services, rather than other public transportations, even if metro is available near the exhibition center.

Exhibitors appraise parking and loading availability and convenience; whereas this is not of much concern for visitors. Layout of the exhibition center and floor plan designed by the organizers aroused more concerns of the exhibitors, as their booth location is a major concern. Visitors are not much obsessed by the layout or floor plan as long as it is convenient for them to browse the site.

Although many interviewees marvel the grandness of some venues, for many purpose-built exhibition centers are designed to be city icons and aesthetic value parallels the functional value, they value more on the interior design that provides convenience of using the venue, and on service quality provided by the venue.

Destination Infrastructure

Following venue facilities frequently stated by the interviewees: local transportation such as taxi and metro system; safety and security; quality, variety, and rates of hotels; quality and variety of food; direct flights to the destination or ease of arriving at the destination.

A destination must have sufficient capacity to accommodate either tourists or event participants. In this regard, requirements are similar to leisure tourists, convention participants, and exhibition participants. Interviewees in this study frequently corroborate city capacity to provide quality hotels, a variety of choices in hotels of different levels, and reasonable hotel rates during the event period.

Exhibitors and visitors have a high demand for quality and variety of food, as many international exhibitors and visitors crave for cuisine from their place of origin. One interviewee stated, "By the time the fair finishes, we are tired and we just want some good food and relax". If a destination has many restaurants that provide quality, ethnic food, the destination is more likely preferred by international participants.

Destinations that have ease access from places of origin of the participants are highly appraised by participants.

In terms of intra-city transportation, taxi turns out to be the most frequently used way of moving for participants, even for domestic participants. Although both interview cities, Beijing and Guangzhou, have metro systems which stretch to most part of the cities, participants, especially the international ones, claim that it is difficult for them to use the metro system by themselves due to language problem or simply fear of lost in subways. There are a number of problems with taxi services in both interviewed cities, for international participants tend to worry about language barriers, professional ethics of the taxi drivers.

Apart from accessibility, intra-city transportation and accommodation, exhibitors and visitors, especially the international ones, would appreciate that host cities provide sufficient touristic information at exhibition centers, venues, or purposely-built tourist information centers. Many interviewees claim that they do not have easy access to city information with regards to city map, local transportation, tourist attractions, leisure facilities, restaurants, etc. They would highly appreciate if the information is easily attainable and free.

Destination Leisure Attributes

Destination leisure attributes are of a less degree of importance to exhibition participants, for exhibitions are trade events and people go there with utmost business purposes.

Tourist sites are infrequently visited by interviewees; many are not aware of any tourist attractions if these are not of international fame. However, night activities are features frequently stated by visitors. Many visitors say that they would only stay in the exhibition center for a few others and would like to find a place to go at night. Although exhibitors express similar appreciation for night activities, it is to a less degree of important to them, maybe because they work long hours at exhibition centers and need good rest at night or continue with business activities.

Like tourists and convention attendees, exhibition participants appreciate nice weather and climate in the host destination. They also value friendliness of the local people. They hope that they feel culturally accepted. They would not want to conduct business with a destination (or nearby region) if they feel that the people there are not friendly. English-speaking citizens and international ambiance

in the host city will give credit to the host destination, and win preference from participants. One interviewee claimed “Hong Kong is more kind of Western country, you feel you were in, say, London, Amsterdam, you feel near home, not exactly at home”.

Destination Economic Environment and Cluster Effects

The interviewees have varying perceptions towards the importance of the business and economic environments of the destination. Some exhibitors regard it as unimportant as they do not expect local people as buyers, but people from the wider region, or from all over the world; others feel that destination business and economic environment is correlated to the capacities of the destination to attract a large amount of exhibitors and visitors, as well as the quality of facilities and services that the destination can provide. Economic position of the destination is more important if the destination hosts import-oriented exhibitions than export-oriented fairs.

As an indicator for destination business and economic environment, the effect of the presence of industrial clusters (Porter, 1990) on exhibition development is an interesting and under-researched topic. Exhibition distribution in China partially correlates with the distribution of these industrial clusters. Take the Pearl River Delta (PRD) as an example, which is the clustering of a number of cities residing in the triangle of Guangzhou (capital city of Guangdong Province), Hong Kong and Macao. In 2000, there were 122 so-called “specialized towns” (towns or groups of towns characterized by a dominant industry of a ‘considerable’ size) (Bellandi & Tommaso, 2005, p.713). Within these towns, at least 30% of manufacturing outputs are produced by one particular industry with an annual industrial output of more than US\$ 290 million. Most of these towns are located in Dongguan, Foshan, Zhongshan, Huizhou, and Jiangmen, cities of a smaller scale within PRD. The development of these clusters does not seem to follow a precise sectoral distribution, but is more a mixture of tradition and recent opportunities. Guangzhou and Shenzhen, two leading cities with highest level of industrial and urban development in PRD do not host any of these recognized specialized towns (Bellandi & Tommaso, 2006). Based on these industrial clusters (or specialized towns), a number of large scale of exhibitions were developed in these cities, and many of them share similar exhibition concepts. In the Yantze River Delta region, numerous exhibitions also develop based on local industries, such as a garment fair in Ningbo City; Yiwu Fair from Yiwu market for small commodities; and a Textile Machinery Fair in Shaoxing City. Ningbo, Yiwu and other third tier cities in YRD have taken the first-comer advantages in the exhibition market, which hinders development of exhibitions in Hangzhou, the provincial capital city and a famous tourist city in China.

Exhibitors and visitors were asked about their preference of the exhibition being developed in a destination with the industrial cluster, or near the industrial cluster, to the exhibition being hosted in a more prestigious destination with better city capacity for infrastructure.

Exhibitors clearly prefer destinations that are highly developed in the specific industry sector for the exhibition, for it is convenient for them if the exhibition is close to the factory location to save exhibition costs, to provide ease for exhibitors and visitors go to the factories for on-site investigation. However, they also consider this as secondary if compared to destination infrastructure in accommodation and transportation. It is important that the destination has the capacity to accommodate all the participants and provide satisfying services.

Perception of Organizers

Organizers regard destination features as more important than exhibition center features and facilities. They examine a number of features in their decision to develop exhibitions in a particular destination. First, they examine market demand, the development of industry for the exhibition concept, of a particular region, and select a destination with a leading position in the region. They usually have a model to calculate market demand. Then, they will consider city capacity and prestige so that it provides ease of promotion to exhibitors and buyers. They appreciate host city mobilize resources to support an exhibition, e.g. taxi service required, shuttle buses, additional ticket-selling staff at metro stations during the peak hour of transportation to and from the exhibition center. Quality and availability of venue is an important consideration at this step. When considering destination and exhibition center features, organizers care about the performance of the centre for the convenience and

performance for its users. They emphasize on the functionality of the center, such as the size of halls, allocation of halls, entrances, parking lots, transport system leading to the center, quality of management staff, etc. Second, they pay attention to existing exhibitions in a destination for market penetration, so that they can develop via merger and acquisition. Third, they value policies, regulations, rules developed by local governments to regulate the exhibition industry. They appreciate the ease of obtaining exhibition license, clear rating of scale of exhibitions, protection of exhibition brands, coordination, and of course, incentives. However, organizers expect consistent assistance and facilitation from government, in terms of exhibition and destination promotion, but over-supply of incentives will not cover business risk and is not sustainable for exhibition industry development in a particular destination.

Organizers become more cautious in penetrating to other destinations with economic recession, rivalry in the exhibition market, and established channel of sourcing and buying by many foreign buyers. Thus, market demand and other destination features become even more important for organizers to consider.

SUMMARY AND IMPLICATIONS

If compared to exhibition theme, concept and program, destination and venue characteristics are definitely secondary in building up an exhibition brand, and for the most part considered as unimportant by many exhibition participants with a strong business appeal. If the exhibition that they feel committed to were to be transplanted to other places, they seem to have little hesitation to move with it, even if the new host site is an unknown place. This seems to be contradictory to their preference of comfortable facilities and ease of access that a host destination can provide.

Organizers have noticed the influence of destination factors on promotion and development of exhibition brand. Thus, they favor bigger cities, especially gateway cities, which benefit from the industrial clusters in the peripheral areas. That's why Shanghai, Beijing and Guangzhou are more appealing than smaller cities.

This study identified different aspects from tourism and convention site selection, as well as different perceptions and preference among exhibitors, visitors and organizers. It can be summarized that destination is more important than venue in attracting and retaining exhibitions, although destination features are definitely secondary compared to the exhibiting and visiting activities. Perceptions towards the importance of the business and economic environment of the host city vary. Industrial cluster is secondary if compared to accessibility and city management, but different stakeholders have different weighting toward cluster effects. City characteristics are secondary, but participants have varying preference over facilities and host city environment.

Destinations need to mobilize all their resources to facilitate exhibition development, e.g. promoting the city, providing free city information in airports, train stations, hotels, exhibition centers, and metro stations. Destination management parties shall analyze the opportunities for their venues diligently, based on market analysis of the regional industries, location of the region, the visitor and exhibitor potential, local market players, and regional competing venues. They should also analyze the specific functionality of the venue and provide ease for all participants.

China is presently considered the largest emerging exhibition market internationally. Although the interviews were conducted at two first tier cities, the interview contents were not confined to the two cities only. Destination and venue features identified as conducive to exhibition industry development in this study should be able to be generalized to other destinations in China as well as in other emerging markets.

Regarding future studies, more interviews shall be conducted with organizers, for they are the key stakeholder who makes the site-selection decision. Future studies shall also examine how organizers detect market demand, and how clusters impact on exhibition development and to develop effective, valid instruments to measure cluster effect.

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