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## 1 **The Spatial Economy of North American Trade Fairs**

2           Through a study of trade fairs, this paper illustrates that relational approaches to  
3 economic geography are not limited to the sphere of economic and social relationships.  
4 These relationships are influenced by and, in turn, shape material realities, such as  
5 specific infrastructure and the labor market, in a reflexive manner. Trade fairs are  
6 “relational events” that bring together regional, national and often international  
7 producers, users, suppliers, and other agents of a value chain or technology field for the  
8 purpose of exchanging knowledge about technological and market developments,  
9 building partnerships, and maintaining existing networks through learning by interaction  
10 and observation. However, these events are also situated in space and time, grounded in  
11 the contexts of particular industries, trajectories of industrial marketing and trade  
12 patterns, as well as the economic geographies of places. Focusing on North America, this  
13 paper presents and analyses data on the economic geography of trade fairs and their  
14 regional economic impact. It explores regional trade fair patterns and dynamic changes in  
15 major trade-fair cities by emphasizing the role of history and economic context.

16           **Keywords:** North America, relational economic geography, trade fairs, regional  
17 economic impact

18

## 19 **Introduction**

20 European trade fairs have long been the center of economic and cultural exchange  
21 – places where products were traditionally traded between national or international  
22 traders and local consumers. They developed as a consequence of highly regulated and  
23 segmented territories that had established rigid trade restrictions (Allix, 1922;  
24 Fuchslocher and Hochheimer, 2003; Rodekamp, 2003). Only during certain days of the  
25 year, often related to Christian holidays, non-local traders were permitted to sell their  
26 products to the population of the respective urban areas. These temporary markets  
27 (Golfetto and Rinallo, 2011) later developed into events through which market and  
28 technology trends, as well as information about economic and political regulations, were  
29 discussed and disseminated. By the medieval period, trade fairs were already much more  
30 than just marketplaces. Two criteria particularly influenced the geographical distribution  
31 of European trade fairs: (a) the existence of a production core in the surrounding region  
32 and (b) proximity to intersecting trade routes. Despite this, the geography of trade fair  
33 activities did not remain static, but underwent significant changes over time. To  
34 understand these geographical shifts, we must keep in mind that most such events were  
35 normally not deeply embedded in the urban fabrics that hosted them (Allix, 1922). Shifts  
36 in trade fair locations were influenced by political hegemonies, disparities in economic  
37 development, innovation cycles, and shifting markets. In the twentieth century, trade fairs  
38 increasingly shifted their focus from places for finalizing contracts and sales to those  
39 where important information and knowledge about product characteristics, innovations,  
40 and market trends were exchanged (Borghini et al., 2004; Maskell et al., 2006).

41           While substantial information about the history and geography of European trade  
42 fairs exists (Allix, 1922; Fuchslocher and Hochheimer, 2003; Rodekamp, 2003), North  
43 American fairs developed much later and have not been studied as extensively as their  
44 European counterparts. Consequently, less is known about the geography of trade fair  
45 activity in the U.S. and Canada, the attendance of such events by exhibitors and visitors,  
46 and the dynamic changes in the trade fair business (for an exception, see Zelinsky, 1994).

47           To address this research gap, this article has two goals: First, we aim to  
48 investigate the economic geography of North American trade fairs by studying  
49 characteristics such as the number and size of trade fairs in terms of attendance and  
50 exhibition space in U.S. and Canadian cities.<sup>1</sup> Second, we aim to explore and quantify  
51 changes in the North American trade fair industry. This is particularly important as these  
52 events are not only “relational places” where information and knowledge are circulated  
53 and disseminated through intensive inter-firm communication; they are also associated  
54 with physical places and materialize in the form of a local support industry that provides  
55 local jobs and incomes. Our research contextualizes the changes in the geography of trade  
56 fairs over the past forty years and identifies the connections between these events and  
57 North America’s broader economic geography.

58           Using this as a starting point, our argument is structured as follows: The next  
59 section provides a conceptual discussion about the role of trade fairs in the global  
60 knowledge economy and their relational geographies. Here, we also discuss the research  
61 methodology and point at the limited availability of reliable data on North American  
62 trade fairs. The paper then discusses growth of trade fairs in North America in the post-  
63 World War II more broadly. The section that follows focuses on recent structures and  
64 trends since the turn of the millennium, before the rise of trade fairs in Chicago, Las

65 Vegas, and Toronto is investigated to explore important trajectories in the development  
66 of major trade fair centers. This allows us to demonstrate how different trade fairs  
67 trajectories of major trade fair centers have become established over time in a relational  
68 manner through reflexive interrelationships between trade fair development, historical  
69 structures, and infrastructure investments. Finally, the paper draws some conclusions  
70 about the future of trade fairs in an increasingly volatile economy.

### 71 **Relational Geographies of Trade Fairs**

72         Recent work argues that trade fairs – especially international ones – have become  
73 a core element of new relational geographies (Bathelt and Schuldt, 2010). Trade fairs no  
74 longer focus on the exchange of goods and the signing of sales contracts (although still  
75 important), but instead are catalysts of knowledge circulation through which knowledge  
76 and understanding about industries and technologies is created and disseminated over  
77 distance. Trade fairs can be viewed as “relational places” that emphasize the role of  
78 economic action and interaction in understanding and explaining economic structures.  
79 This fits well into the context of recent work on relational economic geography which is  
80 generally characterized by a number of commonalities, including (a) its focus on  
81 economic agency in space instead of spatial representations, (b) micro-level reasoning,  
82 (c) an institutional focus in analyzing stabilizations of economic practices, and (d)  
83 analysis of the effects of globalization on economic organization and the resulting global-  
84 local tensions (Yeung, 2005; Bathelt, 2006). Trade fairs specifically focus on bringing  
85 together members of a particular value chain or industry to display new products to  
86 potential suppliers and customers, as opposed to conventions and congresses where the  
87 emphasis is placed on knowledge acquisition at seminars and lectures.<sup>2</sup>

88           The relational character of trade fairs has been acknowledged in studies that  
89 characterize trade fairs as temporary assemblages of human beings (Zelinsky 1994),  
90 periodic events in the social economy (Norcliffe and Rendace, 2003), temporary clusters  
91 (Maskell et al., 2004), cyclical clusters (Power and Jansson, 2008), or temporary markets  
92 (Golfetto and Rinallo, 2011), with organized proximity for interaction (Rallet and Torre,  
93 2009).<sup>3</sup> Trade fairs provide information about global developments in markets and  
94 technologies and are key for making personal contact with potential customers and  
95 suppliers. As opposed to earlier work, recent studies emphasize the knowledge-based  
96 character of these events (Borghini et al., 2006; Maskell et al., 2006; Bathelt and Schuldt  
97 2008; 2010) and describe how certain international trade fairs have become central nodes  
98 that connect the global political economy (Bathelt, 2011), creating a microcosm of an  
99 industry for a limited period of a few days (Rosson and Seringhaus, 1995).

100           Trade fairs generate opportunities for knowledge creation, networking, product  
101 branding and market development beyond the local scale. Face-to-face (F2F) meetings  
102 with other participants enable firms to systematically acquire information and knowledge  
103 about the technological and strategic choices of competitors, suppliers, and customers  
104 (Borghini et al., 2004). During trade fairs, information concerning industry-wide trends  
105 and ideas – as well as all sorts of news and gossip – flow between spatially and  
106 temporally clustered participants (Maskell et al., 2006). Agents benefit from integrational  
107 and informational cues developed through repeated, intensive, and often short F2F  
108 encounters which lead to a specific communication and information ecology, referred to  
109 as “global buzz” (Bathelt and Schuldt, 2010).<sup>4</sup> Global buzz involves unique processes of  
110 knowledge dissemination and creation through interactive learning and learning by  
111 observation (Maskell et al., 2006). It is related to the dedicated co-presence of global

112 supply and demand; intensive, temporary F2F interaction; a variety of possibilities for  
113 observation; intersecting interpretative communities; and the formation of multiplex  
114 relationships (see also, Borghini et al., 2006). For many participants, the value of the  
115 trade fair is in this buzz-based learning rather than the actual sales or purchases made.

116         International fairs bring together leading and less well-known agents from an  
117 entire industry or technology field for the primary purpose of exchanging knowledge  
118 regarding present and future developments of their industry, centered around displays of  
119 products, prototypes and innovations. This allows actors to develop an overview of  
120 market trends and provides a myriad of opportunities to make contact, ask questions, and  
121 engage in F2F communication with other agents in the same value chain or industry  
122 (Rosson and Seringhaus, 1995; Sharland and Balogh, 1996; Godar and O'Connor, 2001;  
123 Prüser, 2003). Firms that regularly attend these fairs are able to find suitable partners to  
124 complement their needs, establish trust with distant partners, and undertake the first steps  
125 toward the development of durable inter-firm networks in research, production, and  
126 marketing. Exhibitors and visitors benefit enormously from the variety of formal and  
127 informal meetings held with a diverse array of agents (Borghini et al., 2006; Entwistle  
128 and Rocamora, 2006).

129         A relational interpretation of trade fairs, however, needs to go beyond a  
130 discussion of flows and networks. It suggests that economic action is not only shaped by  
131 socio-institutional relationships but also influenced by outcomes and structures related to  
132 former decision-making and interaction, albeit not in a deterministic manner (Bathelt and  
133 Glückler, 2011). Therefore, a relational analysis clearly builds on evolutionary  
134 perspectives. This allows us to take into consideration how material geographies of  
135 buildings and infrastructure affect economic action and interaction, and how the results of

136 this interaction (for instance, investments into new trade fairs centers), in turn, impact the  
137 use and further development of material geographies in a relational manner. The final use  
138 of a new exhibition space is, for instance, not *a priori* determined. Whether it will  
139 become a conference or convention center, a place for local or international exhibitions  
140 and trade fairs, a shopping mall, or a place for sports and recreational activities in the end  
141 depends on the revenue flows this produces, on the way how potential users and their  
142 clients use this space and what other options they have, and how investors react to their  
143 decisions. As such, there is a connection between traditional analyses of sites and  
144 locations and recent investigations of knowledge flows in economic geography.

145         From this it becomes clear that trade fairs are not only places where information  
146 and knowledge are circulated through intensive inter-firm communication. They also  
147 materialize in place and are associated with these places in grounded ways through  
148 money flows, jobs in services and catering, and they establish a trade-fair support  
149 economy within the urban fabric. The additional income and employment this produces  
150 can make a substantial contribution to the overall economy (Schätzl et al., 1993). In the  
151 case of Germany – a leading country in the international trade fair industry – trade fairs  
152 attracted an average of 26.6 million visitors and 331,000 exhibitors per year between  
153 2005 and 2008. They generated €12.1 billion in direct economic effects (including  
154 investments of the trade fair organizers), plus an additional €11.4 billion of indirect  
155 effects. In terms of the labor market, these events created a total 226,300 jobs in Germany  
156 (AUMA, 2009c).

157         At the urban level, these events provide a substantial economic stimulus. In  
158 Munich, for instance, trade fair exhibitors and visitors produced direct and indirect  
159 economic effects of €2.2 billion per year between 2004 and 2007, creating almost 22,000



160 jobs in the city-region (Penzkofer, 2008). Vancouver authorities estimated that, in 2007,  
161 trade fair attendees and convention visitors generated a combined \$584 million (CAD) in  
162 direct spending, leading to over \$1.0 billion (CAD) of secondary economic output and  
163 generating more than 13,000 jobs (Tourism Vancouver, 2007). In general, these events  
164 support the local hotel, leisure, and entertainment sector and generate important  
165 multiplier effects for cities. Moreover, trade fairs connect urban economies with wider  
166 national or international industries and production chains, helping to establish, maintain,  
167 and extend strategic knowledge pipelines that both originate from and are directed to  
168 these places (e.g. Malecki and Poehling, 1999; Bathelt, 2011).

169       Trade fairs clearly demonstrate the reflexive relationship between non-material  
170 and material geographies. They are manifestations of the continued need for temporary  
171 proximity and face-to-face contact even within a globalized economy. At the same time,  
172 they have localized material outcomes in the real geographies of places. This  
173 demonstrates the continued need to study relational phenomena not only in the context of  
174 dense networks of socialized relationships, but also how these phenomena touch down in  
175 particular places and create or alter material social and economic geographies. While  
176 recent studies have emphasized the relational character of trade fairs in the knowledge  
177 economy (Borghini et al., 2004; Maskell et al., 2006; Bathelt and Schuldt, 2010), this  
178 paper focuses on their material base in terms of the geographical distribution and size of  
179 these events, and their underlying investment geographies.

180       Given the substantial importance of these trade fairs for knowledge flows and  
181 network building as well as local economic development and job creation, it is surprising  
182 how little is known about the size, structure, and development of these events in North  
183 America. In our attempt to fill this knowledge gap, we study the structure of these events

184 in the most important North American trade fair cities and characteristic trajectories in  
185 the development of these events in leading trade fair cities. In drawing on the cases of  
186 Chicago, Las Vegas, and Toronto, we demonstrate how historical structures, investment  
187 decisions, and economic relationships have triggered different paths of trade fair  
188 development and how this has, in turn, impacted further investment decisions.

189         The major problem of such an analysis is the lack of robust and reliable data on  
190 North American trade fairs.<sup>5</sup> This paper presents a major effort to collect, check, and  
191 cross-examine existing data, and present it in a careful analysis that is – necessarily –  
192 descriptive in character. We use a variety of methods to characterize the structure and  
193 changes of the industry. The experiences of Chicago, Las Vegas, and Toronto are  
194 examined through both historical documents and interviews with key informants.<sup>6</sup>  
195 Developments in the industry from 1960 to 1990 are examined based on Zelinsky's  
196 (1994) study of trade fairs in the U.S. To study the current state of the trade fair economy  
197 in the U.S. and Canada, we employed different datasets from the Center for Exhibition  
198 Industry Research (CEIR) – a U.S.-based industry group that monitors North America's  
199 trade fair industry. To analyze recent trends, we use two main sources of trade fair data:  
200 The first is the so-called CEIR Index (CEIR, 2005; 2009) which provides information  
201 about trends in the number, attendance, size, and revenues of North American trade fairs.  
202 This dataset presents estimates from a representative sample of trade fairs – the so-called  
203 CEIR Index Events – consisting of 219 events in 2001 and 436 events in 2007. The  
204 second data source records events in the twenty-five largest North American trade-fair  
205 cities, broken down by industry sector, size of trade fair, and location. The detailed data  
206 from 2005, which is based on a census of the population of trade fairs that year, is used  
207 here in conjunction with data from the CEIR Index Events from 2001 to 2007 to project

208 the total number of fairs each year by industrial sector (TSW and CEIR, 2005; CEIR,  
209 2009). These datasets represent the most detailed and comprehensive information about  
210 trade fairs available in the U.S. and Canada and allow for an analysis of the structures and  
211 trends of such events in North America.

## 212 **Post-World War II Trade Fair Growth**

213 Zelinsky's (1994) article "Conventionland USA" remains the foremost work on  
214 the spatial distribution of trade fairs in the U.S., showing that the simultaneous  
215 diversification and specialization of the post-World War II economy, combined with  
216 advances in transportation technologies, dramatically increased the importance of trade  
217 fairs since the 1960s, moving them from simple venues for product demonstration to their  
218 current role as critical nodes in global economic processes (Rosson and Seringhaus,  
219 1995; Bathelt, 2011).

220 Shifts in the geography of North American trade fairs are primarily driven by  
221 changes in the economy, rather than by changes in transportation or the exhibition centers  
222 themselves. In 1960, trade fairs were heavily clustered in the Manufacturing Belt (Figure  
223 1(a)). The largest trade fair cities at this point in time – as measured by attendance – were  
224 embedded in the road, rail, and air networks of the time, and had large numbers of local  
225 industrial firms looking for opportunities to demonstrate their products. Thus, trade fairs  
226 were clustered in cities like Chicago, New York, or Philadelphia. Other important trade  
227 fair cities included Washington, DC and Miami where capitol attractions and leisure  
228 activities attracted fairs and attendees (Zelinsky, 1994).

229 By 1990, these patterns shifted substantially in response to changes in the  
230 American economic geography (Figure 1(b)). These dynamics reflect a dramatic shakeup

231 resulting from the decline of the Fordist economy in traditional industrial centers and the  
232 rise of the Sunbelt (e.g. Perry and Watkins, 1977). The most prominent change between  
233 the 1960s and 1990s was the movement of trade fairs away from the industrial Northeast  
234 and towards Sunbelt and Southwest cities like Las Vegas (which jumped from rank  
235 twenty to rank four) and New Orleans (which moved from rank sixteen to rank two).  
236 Older industrial cities with aging, first generation trade fair centers lost ground to newer  
237 destinations in the Sunbelt (Zelinsky, 1994).<sup>7</sup> Nonetheless, this did not have the character  
238 of a complete shift to the South. Northeastern and Mid-Atlantic cities like Boston (rank  
239 ten in 1990) and New York City (rank eleven) remained important nodes in the trade fair  
240 economy (Zelinsky, 1994).

241         The mobile nature of trade fairs helps explain this trend: Small trade fairs can  
242 choose between hundreds of different urban locations. The choice may depend on the  
243 participants' access to a city or the potential for leisure pursuits (Law, 1987). Only the  
244 largest trade fairs are restricted to large urban areas with major facilities that can  
245 accommodate them. The mobility of trade fairs allows for gradual shifts in the spatial  
246 distribution: events gravitate towards regions and cities that are growing, away from  
247 those that are shrinking.

248         Figure 1(c) completes this trend over the study period. Although the shift from the  
249 Northeastern to Southern and Western cities was most prominent between 1964 and 1990  
250 with a southwestern shift of the mean center of trade fairs by about 540 kilometers  
251 (Figure 1(a) to 1(b)), further significant changes occurred after this period. The shift  
252 between 1990 and 2005 was not quite as strong, with a movement of the mean center by  
253 about fifty kilometers to the South, as the substantial gains of states like California and  
254 Texas balanced out the remarkable rise of Toronto, Ottawa, Montreal, and Vancouver in

255 Canada (Figure 1(b) to 1(c)). This clearly shows that the concentration of trade fair  
256 activity in the U.S. Manufacturing Belt dissipated by 2005, while prominent new clusters  
257 of trade fair activity developed in the California/Nevada and Texas/Louisiana corridors,  
258 as well as in major Canadian cities.

259 The continued shifts in the top twenty-five trade fair cities suggest that trade fair  
260 activities are not locked into static geographies. While several large cities like New York  
261 City and Chicago consistently retained their position in the rankings, the correlation  
262 between population and number of trade fairs declined from 0.76 in 1960 to .12 in 2005.  
263 This demonstrates the success that smaller cities like Orlando and Las Vegas have had in  
264 attracting a substantial number of trade fairs through large investments in their  
265 infrastructure. The geography of trade fairs is not merely a function of city size.

266

267 [Insert Figure 1 about here]

268

269 Overall, the U.S. overshadows the Canadian trade fair industry despite the  
270 emergence of Toronto and Montreal as important trade fair cities in the 1970s and 1980s  
271 (AUMA, 2002). Canadian cities are disadvantaged when competing for international  
272 trade fairs because of the comparative smallness of the Canadian market. Most  
273 international exhibitors focus on U.S. trade fairs, knowing that their Canadian clientele  
274 will likely attend these fairs. The same cannot be said for American firms participating in  
275 Canadian fairs. As a consequence, most Canadian fairs have a primary regional/national  
276 focus, with few exceptions such as Calgary's Global Petroleum Show or Fort  
277 McMurray's Oil Sands Trade Show, which are global in character.<sup>8</sup>

278           The post-World War II shifts in the North American economy and increased  
279 competition between North American cities contributed to trends towards image-making  
280 in urban centers. Selling the city as a trade fair destination has become a significant  
281 element of city branding and economic development (Bradley et al., 2002). Trade fairs  
282 are valuable both for the direct revenue and employment that they generate — trade fair  
283 attendees spend two to three times more than leisure tourists (Law, 1987) — but also  
284 because cities use trade fairs to construct images that encourage future visits and  
285 investment (Opperman, 1996; Opperman and Chon, 1997). Although the actual economic  
286 impact of trade fairs is frequently pointed out as a rationale to host such events, the  
287 supposed benefits of business tourism appear to be sometimes overestimated and the  
288 costs underestimated (Sanders, 1992; 2002).<sup>9</sup> While the immediate economic benefits of  
289 trade fairs, such as direct and indirect job creation, are localized, other benefits,  
290 especially the resulting knowledge flows and circulation, are broad and have a national  
291 and global component.

292           Major trade fairs are important because they connect small regional firms with  
293 national or international markets (Wilkinson and Brouters, 2006; Ramirez-Pasillas,  
294 2008). Both large and small firms benefit from being part of the localized microcosm of  
295 their industry during major fairs (Kijewski et al., 1993; Rosson and Seringhaus, 1995;  
296 Power and Jansson, 2008). In the next section, recent structures and trends of the North  
297 American trade fair business are presented and interpreted. These patterns provide  
298 evidence of continued growth, rather than stagnation or decline.

299 **Distribution and Trends of North American Trade Fairs**

300           Although recent reports have questioned the importance of trade fairs in the  
301 Internet Age (Backhaus and Zydorek, 1997; Moellenberg and Teichmann, 2000), this  
302 section presents evidence of the continued growth of trade fairs in major urban centers in  
303 the U.S. and Canada – contrary to what is sometimes assumed. Despite the development  
304 of real time video conference systems and other telecommunications technologies, the  
305 continued growth of trade fairs over the past decade demonstrates the continued need for  
306 periods of intense face-to-face interaction in the business cycle. The value of the buzz at  
307 trade fairs outweighs the substantial costs and inconvenience of attending them. Overall,  
308 the number of events in the top twenty-five North American trade fair cities has increased  
309 from 4,521 in 2001 to 7,753 in 2007. In the same time period, the average number of  
310 exhibitors and attendees per event also increased by 31% and 25%, respectively (CEIR,  
311 2005; 2009).

312           While this suggests that trade fairs continue to increase in importance in North  
313 America, we should be cautious in drawing conclusions about this growth. The entire  
314 industry experienced a decline in the wake of both the post dot-com recession and the  
315 9/11 shock, resulting in a downturn that lasted at least until late 2002. Moreover, the  
316 number of trade fairs in 2001 was already depressed due to the collapse of the “new  
317 economy” bubble and the IT fairs associated with it (Breiter and Hahm, 2006). The  
318 subsequent increase was due to both strong economic growth and a recovery from  
319 previous crises. Although some observers expected longer-term stagnation of trade fair  
320 activities (AUMA, 2004a; 2009a), many events and most sectors experienced substantial  
321 growth in the first decade of the new millennium as discussed below.<sup>10</sup>

322            Depending upon which definition is used, the U.S and Canada host between 5,000  
323 and 13,000 trade fairs per year (AUMA, 2009a). CEIR (2005) estimates that  
324 approximately 10,000 events in the mid 2000s were business-to-business fairs, which  
325 attracted about 60 million attendees and 1.5 million exhibitors, generating direct revenues  
326 of \$10.3 billion. This indicates that trade fairs are a significant element in the overall  
327 North American economy and of specific importance to the large urban trade fair centers.  
328 The economic impact of trade fairs, derived from payments to direct and secondary  
329 employment and the local expenditures of delegates and exhibitors, was estimated to be  
330 as high as \$140 billion in 2003 (Lee and Back, 2005).

331            Figure 2 illustrates the growth in the number and average size of trade fairs  
332 between 2001 and 2007. The data suggest a strong increase in both the number and size  
333 of the events, with temporary interruptions in 2002 and 2005. Overall, the average size of  
334 a trade fair increased by 47%, from 115,000 square feet in 2004 to over 165,000 square  
335 feet in 2007. Although major U.S. trade fairs had, on average, a similar number of  
336 exhibitors than their European counterparts, they fell far behind in terms of attendance.  
337 The 200 largest trade fairs and exhibitions in the U.S. had about 975 exhibitors per event  
338 in 2002, compared to about 1,130 and 610 exhibitors per international fair in Germany  
339 and Italy, respectively (2002 to 2005). Similarly, the 200 largest trade fairs in the U.S.  
340 had on average about 21,000 visitors, while international trade fairs in Germany and Italy  
341 averaged at about 65,000 to 70,000 visitors per event (Kresse, 2003; Maskell et al., 2004;  
342 CERMES, 2005).

343

344

[Figure 2 about here]

345



346           The CEIR Index breaks trade fairs into twelve industrial sectors. Figure 3 tracks  
347 the growth and decline of the number of trade fairs (a), exhibitors (b) and attendees (c) in  
348 a selected number of characteristic sectors. The data shows steady growth in terms of  
349 fairs, exhibitors, and attendees across most sectors. Trade fairs focusing on fields such as  
350 government, public service and non-profit; professional business services; or  
351 construction, building, home and repair saw consistent growth in all metrics over the time  
352 period. Noticeable was the decline in the number of information technology and  
353 communication fairs, from 929 fairs in 2001 to 842 in 2007. This sector was the only one  
354 with a decline in the number of events, which appears to be related to the earlier dot-com  
355 boom-and-bust period. The strongest growth in the number of fairs can be found in  
356 industrial/heavy machinery and finished business inputs (from 122 to 355) and in the  
357 professional business services industry (from 596 to 1,254).<sup>11</sup> While exhibitor growth  
358 was gradual and consistent across all sectors, with the exception of the food and raw  
359 materials and science sectors, which experienced very strong increases since 2005  
360 (Figure 3b), attendance levels grew in a relatively unequal manner across different  
361 sectors (Figure 3c). From a knowledge-circulation perspective, the overall intensification  
362 of trade fairs is a desirable development as larger fairs attract more exhibitors and  
363 attendees and provide a better environment for interaction among diverse participants,  
364 supporting the creation and dissemination of new knowledge and innovation (Borghini et  
365 al., 2006; Maskell et al., 2006).

366

367

[Figure 3 about here]

368

369 Table 1 supports the finding that trade fair activities experienced substantial  
370 growth between 2001 and 2007 overall, but not all sectors saw the same development.  
371 Whereas average attendance per event increased by 39% in the construction, building,  
372 home, and repair sector, it decreased both in terms of exhibitors per event and average  
373 exhibition space. This meant fewer opportunities for firms to observe the market and their  
374 competitors. We can also see the effects of industry downturns on trade fairs, for instance  
375 a 12% decrease in the size of the average information technology and communications  
376 fair between 2001 and 2004, as the industry bottomed out. Both new sectors, such as  
377 professional business services, but also traditional segments, such as raw materials and  
378 science, experienced strong growth in all indicators, suggesting a rising importance of  
379 trade fairs across the North American economy.

380

381 [Table 1 about here]

382

383 While the forgoing data give an overview of changes in the trade fair economy  
384 overall, the regional distribution of trade fairs in 2005 identifies the cities that benefited  
385 most. Table 2 lists the top trade fair cities in North America in 2005. It distinguishes two  
386 types of fairs by business focus: Business-to-Business (B2B) and Business-to-Consumer  
387 fairs (B2C). B2B fairs are the usual type of trade fairs studied by researchers (with the  
388 notable exception of Penaloza, 2001), since these are the events where value-chain-based  
389 learning processes take place. B2B fairs feature businesses interacting with and selling to  
390 other businesses. Participation is limited to a specialized subset of firms arranged in a  
391 value chain or technology field through high attendance fees or invitations. B2C fairs are  
392 based around advertising and selling goods to the general public. Consumer products,

393 from mops to motorboats, are exhibited to the public in the hope of making direct sales  
394 on the exhibition floor. The primary goals of B2C fairs are immediate sales and market  
395 penetration, unlike B2B fairs where indirect sales, lead generation, and knowledge  
396 gathering are more important activities (Godar and O'Connor, 2000).

397

398 [Table 2 about here]

399

400 Tables 2 and 3 suggest that major North American trade fair centers/cities have  
401 diverse sectoral specializations. The data indicates few connections between the sectoral  
402 patterns of trade fairs and the cities' industrial specializations. This can be explained by  
403 two tendencies: First, trade fairs have, over time, displayed a strong mobile dynamic.  
404 Second, North American trade fairs are even less place-bound than European fairs. Many  
405 European trade fair centers historically developed around specialized manufacturing  
406 regions and although changes in markets, technologies, and regulations led to relocations,  
407 these events had often stable locations for a certain time period. As will be shown below,  
408 the development of trade fairs in North America was different. Due to the importance of  
409 traveling salesmen in the industrial distribution system, and the importance of mobile  
410 conventions of technical communities that later attracted exhibits of products and  
411 technologies, national and international trade fairs in North America more often change  
412 their location from year to year (AUMA, 2004a; 2009a). Despite these general trends,  
413 however, we can identify some specialization trends in trade fair structures that can be  
414 linked to a city's economic strength or industrial history.

415

416 [Table 3 about here]

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418           With 780 fairs in 2005, Las Vegas stands out as North America's dominant trade  
419 fair city (Tables 2 and 3). Its large-scale trade fair infrastructure, based around large  
420 publicly-owned convention centers and exhibition spaces, as well as hotel rooms and  
421 exhibition space in all the major casinos, gives the city the capacity needed to host  
422 several major events simultaneously (Jones, 2006; Yang, 2008). This developed  
423 infrastructure generates a competitive advantage in competing for large international  
424 trade shows and is a major part of the city's overall tourism revenue.

425           Toronto, North America's second largest trade fair city, also stands out not just  
426 for the number of events it holds every year but for the high proportion of B2C fairs  
427 (63% of all fairs). This is indicative of a structural difference between trade fairs in U.S.  
428 and Canadian cities. All Canadian cities exhibit a high proportion of B2C fairs (Table 2):  
429 44% in Vancouver, 43% in Ottawa, and 39% in Montreal. In contrast, the average  
430 proportion of B2C fairs in U.S. cities was 15%. We have to exercise care in interpreting  
431 these numbers in terms of different demand- and supply-side patterns. On the one hand,  
432 the large number of consumer-oriented fairs in Canada is a reflection of the fact that it is  
433 more difficult to attract international businesses to the relatively small Canadian market.  
434 Therefore, a stronger focus on consumer-oriented fairs is almost a natural consequence.  
435 At the same time, this may also be a reflection of trade fair center capacity exceeding  
436 demand for B2B fairs, a gap filled in by a large number of B2C fairs (Interview with  
437 Direct Energy Centre Official, December 2009). The different structure of trade fair  
438 activities has substantial consequences on the national geographies of cities. The large  
439 proportions of B2C fairs suggest that Canadian cities derive fewer economic benefits

440 from trade fairs compared to U.S. cities, both in terms of direct trade-fair-related revenue,  
441 as well as placing the city within global flows of industrial and commercial knowledge.

442         Of the twenty-one top U.S. cities, thirteen were located in the Southern and  
443 Western regions of the Sunbelt (e.g. Atlanta, Dallas and Phoenix) and four cities are in or  
444 close to the Manufacturing Belt (New York, Chicago, Boston, and Minneapolis) (Figure  
445 1). Following Zelinsky's (1994) analysis, this shows a continuation of the movement  
446 away from manufacturing-dependent regions. The rise of Southern and Western cities as  
447 major trade fair destinations is linked to their rise as industrial and commercial hubs  
448 throughout the 1970s and 1980s. As the cities' economies and population grew and  
449 became better integrated into national and international transportation networks, they  
450 developed into more popular destinations for trade fairs. Because Sunbelt and Western  
451 cities are less densely built, it is easier for them to build or expand trade fair centers and  
452 hotel capacity, as opposed to older Northeastern and Rustbelt cities, where the space for  
453 larger-scale trade fair center development and expansion is sometimes harder to find.

454         Figure 4 breaks down trade fair cities by the size of events revealing interesting  
455 geographical patterns. Except for cities like Toronto, Vancouver, New York City, and  
456 Minneapolis, the majority of fairs in all cities are smaller than 25,000 square feet (Figure  
457 4). These smaller trade fairs are often regional events that do not attract a geographically  
458 diverse pool of attendees. Some cities, like Orlando, Ottawa, and Boston, specialize in  
459 these smaller fairs. This has implications for the ability of trade fairs in these cities to  
460 serve as effective sites of knowledge sharing and circulation for local firms, since smaller  
461 fairs primarily attract a local audience with few participants from outside the region or  
462 nation. This also means that smaller fairs generate less hotel, restaurant and entertainment  
463 revenues, reducing their overall value to the city.

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[Figure 4 about here]

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Extra-local participation is vital for trade fairs to serve as sites of global buzz (Bathelt and Schuldt, 2008), and as “pipeline catalysts”. Though there is no data on the distribution of international trade fairs in North America, large B2B fairs typically attract a substantial international audience, bringing in both increased tourism revenues and novel knowledge that is circulated throughout the event. Hosting large trade fairs requires that the trade fairs center, the local airport and hotels all have sufficient capacity to handle a substantial international audience.

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Table 3 reports the number of events in each city by sector and indicates the corresponding Trade Fair Location Quotient (TFLQ).<sup>12</sup> A TFLQ above 1.20 means that the respective city hosts over 20% more trade fairs in a sector than the average city in our dataset. We use TFLQs of 1.20 and higher as an indicator of sectoral specialization patterns in North American trade fairs cities. Although specialization patterns observed through this method are not overly prominent and cannot easily be explained by urban economic production specializations, some exceptions exist. San Francisco, for instance, adjacent to Silicon Valley and home of many high-technology, telecommunications, and Internet firms – has a high TFLQ of 2.2 for information technology and communications trade fairs. Chicago and Minneapolis – two Rustbelt cities – have above average representations of industrial trade fairs, and all Texan cities in the dataset (Houston, Austin, and San Antonio) have TFLQs between 1.6 and 2.2 in raw materials and science trade fairs. This suggests that trade fair organizers – at least in these prominent cases – attempt to locate events in cities with a heavy concentration of their target industry.

488 Washington, DC has a similarly high TFLQ for government and public sector oriented  
489 trade fairs. In contrast to Washington, DC, Ottawa has a relatively low proportion of  
490 government-related trade fairs. This is, in part, due to the substantially lower aggregate  
491 number of government-oriented trade fairs in Canada compared to the U.S. When  
492 recalculated only for Canadian cities, the TFLQ of government-related fairs in Ottawa is  
493 2.0, similar to that of Washington, DC. In sum, the TFLQs clearly reflect the importance  
494 of B2C fairs in the Canadian trade fair economy (Table 2). Montreal, Vancouver, and  
495 Ottawa have TFLQs of 2.0 to 2.2 in the consumer services, sports, travel, entertainment,  
496 and arts sector, which represent goods marketed directly to consumers at trade fairs.<sup>13</sup>

#### 497 **Development Paths of Trade Fairs in North America**

498 Both the data examined above and a historical analysis suggests that the relational  
499 and material geographies of North American trade fairs differ substantially from their  
500 European counterparts. Trade fairs in Europe developed much earlier than in North  
501 America and reflect to a larger degree traditional trade and industry patterns, major trade  
502 routes, as well as governmental regulations, social struggles, and wars. This resulted in  
503 segmented market patterns in Europe that only gradually changed over time (Allix, 1922;  
504 Boggs, 2005). Shifts in trade fair locations were influenced by political power, disparities  
505 in economic development, innovation cycles, and shifting markets.

506 North American trade fairs emerged out the tradition of industrial exhibitions and  
507 conventions and agricultural fairs. One-time events, like the 1893 World's Columbian  
508 Exhibition in Chicago or the St. Louis World's Fair in 1904, and annual events, like  
509 Toronto's Royal Agricultural Winter Fair, bring together buyers and sellers as well as  
510 serve as a platform for the demonstration of new inventions and products. The largest of

511 these events helped local producers tap into global market places, even before  
512 improvements in communications and shipping technologies spurred globalized  
513 commerce. While these events were popular and important events in the development of  
514 the modern, global economy, they were not trade fairs as we understand them today. The  
515 historical world exhibitions were singular events designed to show off the achievements  
516 of industrial capitalism to the public without offering a formal venue for industrial  
517 suppliers and customers to meet and conduct business. Modern trade fairs are events that  
518 serve as regular meeting places for commercial buyers, users, suppliers, and related  
519 multipliers to present new products and processes, make deals, and observe the changing  
520 nature of the industry.

521         The development of major urban trade fair centers in North America shows  
522 different patterns than those in Europe, starting later and taking place in a largely  
523 homogenous market. The following subsections illustrate three different growth  
524 trajectories that resulted in Chicago, Las Vegas, and Toronto. These cases illustrate how  
525 reflexive relationships between urban planning, industry needs, investment activities and  
526 strategies, and economic development gave rise to specific trajectories with varying  
527 material and relational geographies. Chicago's trade fair economy emerged in the 1950s  
528 out of its pre-existing industrial economy, while Las Vegas's trade fair infrastructure  
529 emerged at the same time, but based on a tourism strategy. Toronto's trade fair economy,  
530 however, emerged in the 1970s through more explicit public-sector-controlled initiatives.  
531 The different paths of trade fair developments demonstrate that trade fairs have become  
532 deeply embedded in both ongoing global economic processes and local politics.



533 Chicago: From World Exhibitions to International Trade Fairs

534 Like many other major industrial cities, Chicago has a long history of industrial  
535 exhibitions and trade fairs, starting in 1893 with the World's Columbian Exhibition: an  
536 international exhibition with over 28 million visitors and 65,000 exhibits. The Century of  
537 Progress International Exhibition in 1933-1934 similarly showcased major scientific,  
538 industrial, commercial, and cultural advances of the day (Findling and Pelle, 2008). The  
539 city's substantial industrial base was able to use these exhibitions to demonstrate their  
540 products to the general public.

541 Although related to these early exhibition successes, Chicago's role as a major  
542 trade fair destination did not begin until 1958 with the construction of McCormick Place  
543 (Metropolitan Pier and Exposition Authority, 2011). Like most major trade fair centers in  
544 North America, McCormick Place was built with government funds and managed by a  
545 public corporation. Since its construction, McCormick Place underwent several stages of  
546 restructuring and expansion: the first in 1967 due to a fire that destroyed much of the  
547 original building and required an almost complete re-build, and several other massive  
548 expansions in 1977, 1984, 1991, and 2001. In 2008, McCormick Place had over 2.6  
549 million square feet of exhibition space, making it the largest such space in North  
550 America, and one of the ten largest in the world (AUMA, 2004a; 2009b).

551 Several other cities close to the Manufacturing Belt, which opened major trade  
552 fair, convention, or exhibition centers in the 1960s, such as Boston and New York,  
553 experienced patterns of infrastructure modernization similar to Chicago. Many  
554 convention centers that were built in the 1960s were torn down in the late 1980s and early  
555 1990s and replaced with newer, larger, and more technologically advanced facilities.  
556 While Chicago has not fully replaced McCormick Place, it built a new dedicated bus-only

557 road linking the facilities with downtown Chicago to cut the commute time for attendees  
558 staying in the city's core.

559         Despite ongoing investments, the large size of McCormick Place has not  
560 prevented Chicago's loss of overall market share in the trade fair business since the  
561 1970s. Chicago's position in Zelinsky's (1994) rankings of trade fair cities dropped from  
562 first in the U.S. in 1964 to third in 1990, and it has since fallen to fifth (TSW and CEIR,  
563 2005). This is, in part, due to the growth of other trade fair cities and increasing  
564 competition between trade fair cities, a process also seen in Europe (Golfetto and Rinallo,  
565 2011). Undoubtedly, Chicago's standing in the North American trade fair economy  
566 would have likely fallen even further if it had not expanded and modernized its trade fair  
567 center to compete with newer facilities elsewhere (Holten and Draeger, 1991).

568         Chicago is an example of a major traditional center of industrial showcasing  
569 originally linked to its strong manufacturing tradition. It hosts important national and  
570 international B2B fairs that induce important knowledge flows. Due to the transformation  
571 of the Manufacturing Belt and the rise of new trade fair centers elsewhere in the U.S., it  
572 has lost some of its former significance – although it is still an important trade fair center  
573 today. Chicago's experience illustrates the challenges that many Rust Belt cities faced in  
574 maintaining their place as key nodes in the global trade fair economy.

#### 575 Las Vegas: From Leisure Capital to Trade Fair Leader

576         Las Vegas is almost synonymous with the North American trade fair industry  
577 today. The city hosts one-third more trade fairs than its nearest competitor, including six  
578 out of the ten largest trade fairs in North America (Fenich and Hashimoto, 2004). The  
579 city's infrastructure is made up of trade fair venues in the large hotel/casinos of the city

580 and the Las Vegas Convention Center (LVCC), a large exhibition hall established in 1959  
581 by the Las Vegas Convention and Visitors Authority (LVCVA) – a public organization  
582 funded through a hotel room tax (LVCVA, 2011).

583         The city's excellent trade fair infrastructure is marked by its huge capacity and  
584 resources (Velotta, 1999; Jones, 2006). Las Vegas has more than 140,000 hotel rooms  
585 and over 43 million square feet of exhibition space (LVCVA, 2009). The LVCC is not  
586 only the third largest trade fair center in North America (AUMA, 2009a); it also has the  
587 largest amount of surface parking of any center. This gives it the capacity to host trade  
588 fairs that no other city in North America can. World of Concrete, for instance, an annual  
589 trade fair for the masonry and construction industries and one of the largest trade fairs in  
590 the world, can only exhibit in the LVCC due to the large surface parking space that is  
591 used for demonstrations of cranes and other construction equipment, along with its large  
592 hotel capacity that can house the more than 80,000 attendees.

593         Originally, trade fairs were seen as a way to increase casino revenue by funneling  
594 business visitors into the city's gambling halls (Bergen, 2003; Fenich and Hashimoto,  
595 2004). This was at a time when participation in trade fairs was sometimes regarded as a  
596 reward for successful employees rather than a critical business function (Tanner, 2002).  
597 Other cities, like Orlando and New Orleans, have also pursued this strategy with success.  
598 Their cultural and leisure activities help attract participants to not only attend the trade  
599 fair, but also to engage in the broader tourism economy.

600         Las Vegas' business tourism began in earnest in 1959 with the establishment of  
601 the LVCVA, whose express purpose was to build the LVCC and promote trade fair and  
602 convention tourism.<sup>14</sup> Until the early 1990s, the LVCC was the city's dominant trade fair  
603 space. With the opening of the MGM Grand in 1993, the first hotel/casino to include

604 substantial exhibition space, the LVCC began to compete with the local casinos for trade  
605 fairs (Interview with LVCVA official, March 2009). Since then, multiple hotels/casinos  
606 have been built with extensive exhibition space, such as the Sands Expo and Convention  
607 Center and the Mandalay Bay Convention Center (Yang, 2008; AUMA, 2009a).

608 Las Vegas' trade fair industry is unique in North America because of the  
609 simultaneous cooperation and competition between the public LVCVA and the privately  
610 run exhibition halls of the major hotels/casinos. The LVCVA is the main body  
611 responsible for promoting the city as both a tourist and trade fair destination. Its work in  
612 selling and branding Las Vegas as a trade fair destination (such as the famous slogan  
613 "What happens in Vegas, stays in Vegas") supports the city's hospitality industry. But the  
614 LVCVA also operates the LVCC, putting it in direct competition with the large  
615 hotels/casinos for trade fairs and exhibitions. While many other cities have a quasi-  
616 publicly operated trade fair center, no other city in North America has a similarly large  
617 concentration of major privately-run trade fair centers.

#### 618 Toronto: From Agricultural Market Place to Trade Fair Center

619 Toronto is a more recent addition to the list of top North American trade fair  
620 cities. Similar to other Canadian and U.S. cities, it experienced a traditional path in the  
621 development of its trade fair infrastructure, starting out as a temporary regional market in  
622 the area of agriculture and manufacturing dating back to the 19th century with events like  
623 the Canadian National Exhibition and the Royal Agricultural Winter Fair (Walden,  
624 1997). The transformation into a modern trade fair city did not begin until the mid 1970s.  
625 The Metro Toronto Convention Centre (MTCC), the city's major downtown trade fair  
626 facility was created in 1984 as part of a partnership between the city, province, and

627 federal government to boost tourism. Though funded as a partnership between all three  
628 levels of government, it is owned and managed by a provincial crown corporation  
629 (MTCC, 2011). The MTCC is particularly oriented towards scientific and medical  
630 conferences. Organizers expressly see this as a way to tie into the city's strengths in  
631 biotechnological and medical research both at local universities and firms.<sup>15</sup>

632 In addition, the city of Toronto owns and operates the Direct Energy Centre, a  
633 trade fair facility built on exhibition grounds a few kilometers west of the MTCC. Due to  
634 its three large interconnected exhibition halls and its tradition, this facility was primarily  
635 used for larger business-to-consumer (B2C) fairs. In recent years, the facilities were  
636 expanded and transformed to become more oriented towards business-to-business (B2B)  
637 fairs, as well as conventions and meetings (Interview with Direct Energy Center officials,  
638 December 2009).

639 Toronto is unusual in that it has two publicly owned convention centers. While  
640 there is competition between the MTCC and the Direct Energy Centre, they have a  
641 different focus. The Direct Energy Centre has larger exhibit halls than the MTCC,  
642 making it a better venue for consumer-oriented shows, while the MTCC has a large  
643 number of smaller meeting rooms for conferences and trade fairs with a strong  
644 educational or instructional component. Thus the two facilities usually do not compete  
645 directly for an event. Rather, they compete against other cities to attract particular events  
646 (Interviews with MTCC officials, July 2009 and with Direct Energy Centre officials,  
647 December 2009). Moreover, Toronto has two privately run exhibition halls. The  
648 International Centre (International Centre, 2011) and Toronto Congress Centre were built  
649 in 1972 and 1995, respectively (Toronto Congress Centre, 2011). Both are located close  
650 to Pearson International Airport, about 30 kilometers west of downtown Toronto. As

651 these trade fair centers are smaller than their publically financed counterparts, they focus  
652 more on local and regional trade fairs compared to the large, more national and  
653 international trade fairs in downtown venues.

654 Overall, the trade fair business in Toronto tends not to be strongly linked to the  
655 regional industry base, although its events do have a substantial proportion of regional  
656 exhibitors and visitors. Toronto's trade fair economy is marked by competition between  
657 the two public conference centers close to the downtown core and the two privately-run  
658 centers in the suburbs. A similar structure of core-periphery competition can also be  
659 found in other North American trade fair cities like Atlanta (Newman, 2002).

660 The size of the suburban exhibition halls – altogether over one million square feet  
661 – contributes to Toronto's high rate of consumer-oriented fairs. While these are primarily  
662 regional events that do not generate substantial tourism revenue, they are viewed as an  
663 important way to advertise the trade fair center and to generate interest in future events  
664 (Interview with MTCC officials, July 2009). Such consumer fairs are less important to  
665 the wider regional economy, since fewer people come from outside the city and do not  
666 consume as many local services ,but they still generate sizable revenues for the trade fair  
667 center.

668

## 669 **Conclusions: Dynamic Trade Fair Geographies**

670 Global buzz at trade fairs enables firms to systematically acquire knowledge  
671 about competitors, suppliers, and customers, as well as undertake first steps toward the  
672 development of durable inter-firm knowledge pipelines in research, production, and/or  
673 marketing (Bathelt and Schuldt, 2008). These pipelines are critical to help firms

674 continuously monitor new developments and trends within their industry. In this sense,  
675 trade fairs are key relational events in the global economy. But trade fairs also materialize  
676 in place and produce substantial regional support economies. They generate jobs and  
677 incomes, particularly in the urban centers that host them. The core idea of a relational  
678 perspective in economic geography is that these two perspectives are not independent.  
679 Material and non-material geographies are bound together in reflexive processes as  
680 historical structures, investment decisions, and urban development strategies that have  
681 generated particular patterns of knowledge flows and communication during local trade  
682 fairs that, in turn, impact the regional economy and lead to further investments. In this  
683 vein, this article focuses on the material aspects of North American trade fair  
684 geographies, the different structure that have emerged, and their dynamic development.

685         This research provides evidence of the continued growth of North American trade  
686 fairs despite changes in the capitalist system and various crises that have occurred over  
687 the past decade. We can witness a shift from traditional manufacturing cities to new trade  
688 fairs locations in the West and South of the U.S., the rise of Canadian cities as important  
689 trade fair locations, the continued importance of large international metropolitan regions,  
690 as well as the impact of local and regional policies on the trade fair business through  
691 investments into new or modernized world-scale facilities. In terms of the latter form of  
692 investment, Las Vegas was a first mover in North America's growing trade fair economy,  
693 but other cities soon followed. Major industrial cities, like New York, Chicago, Boston,  
694 and Detroit, also began extending and modernizing exhibition halls later on. These are  
695 the cities that dominated Zelinsky's (1994) account of the trade fair economy during the  
696 1960s. A second major wave of construction began in the late 1970s, often as part of an  
697 urban revitalization campaign designed to attract jobs and tourists to the declining

698 downtown areas of major cities. Other cities which developed their trade fair  
699 infrastructure in the mid 1990s, like Hartford, Connecticut, and Columbus, Ohio, do not  
700 yet appear among the top twenty-five trade fair cities, but have certainly gained in  
701 importance. It is difficult to predict whether these or other cities will become dominant  
702 players in the trade fair business in the future as there are no linear developments or  
703 simple trends. While these cities have new state-of-the-art facilities, they are still  
704 somewhat peripheral in the urban hierarchy and not well integrated into international  
705 transportation systems.

706         If we assume that contemporary shifts in the geography of trade fairs are driven  
707 by a high degree of competition between cities and by a need to gain accessibility and  
708 visibility in relation to global markets (Golfetto and Rinallo, 2011), the leading  
709 metropolitan areas and transportations hubs with large international airports will likely  
710 become even more dominant trade fair centers in the future. Following this line of  
711 argument, we would expect that these centers attract trade fairs from other cities, thus  
712 moving up in the hierarchy of trade fair places. This would also strengthen their position  
713 at the top of the urban hierarchy, while smaller and more remote cities would fall behind.

714         Such trends are further supported by mergers of trade fairs. Driven, in part, by the  
715 significant temporary cutbacks in trade fair activity and attendance due to the 2008 global  
716 financial crisis, individual trade fairs increasingly merge with similar events in related  
717 industries or the same industries in other places to increase their size and attractiveness  
718 (RolandBerger, 2009). These larger shows can attract an international audience and are  
719 key sites for knowledge exchange and circulation. However, these merged fairs can only  
720 be held in cities with substantial trade fair infrastructure and international air connections.  
721 While trade fair activity will eventually recover from the decline due to the financial



722 crisis and the ensuing global recession, it will likely re-emerge as a more concentrated  
723 industry, with a smaller number of substantially larger fairs. This puts smaller trade fair  
724 cities at a substantial disadvantage, requiring them to either significantly expand the size  
725 of their infrastructure or target a reduced market for more local shows.

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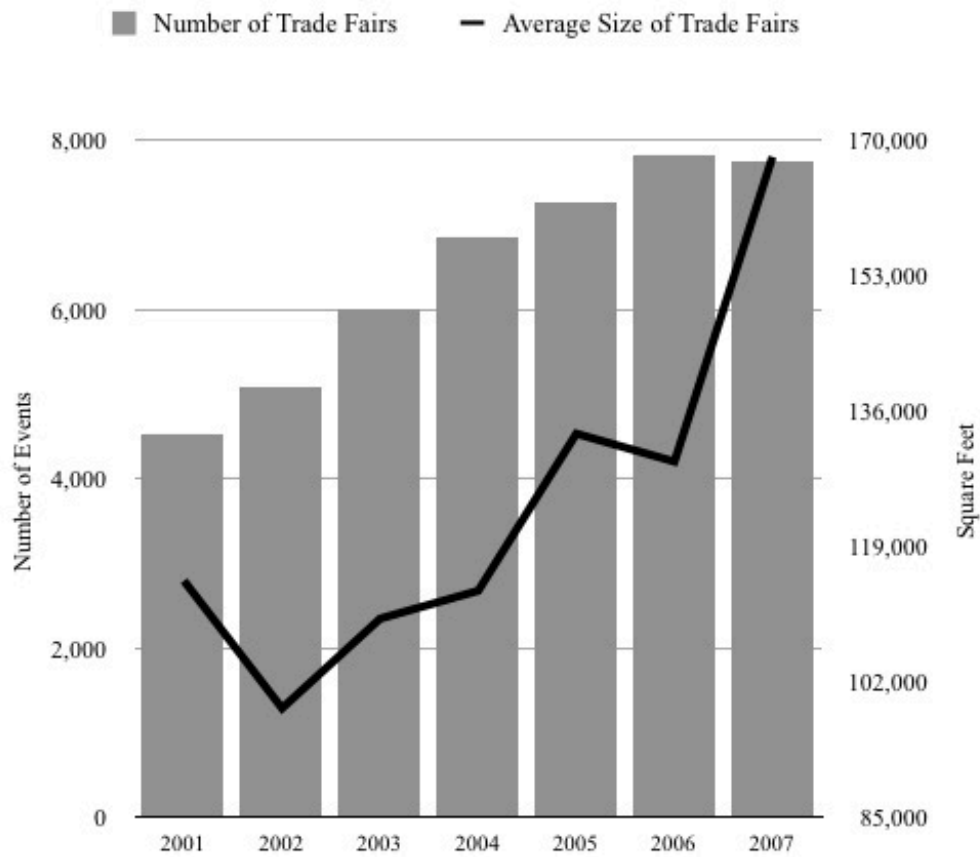


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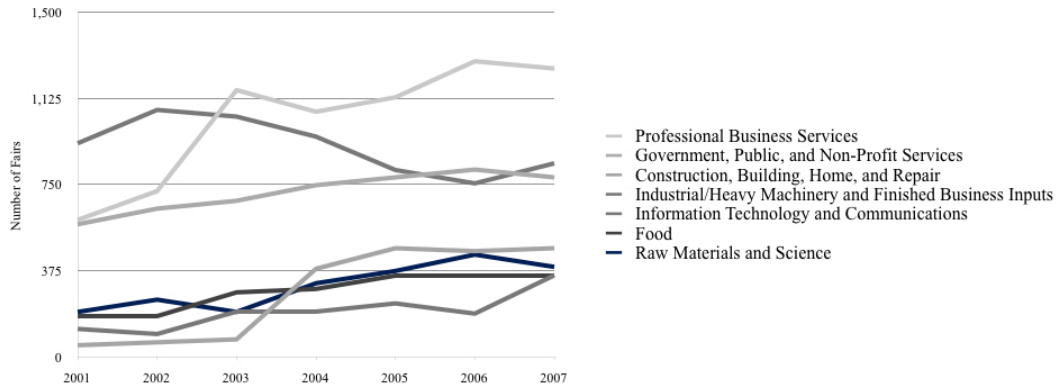
955 Figure 1: Top 25 North American Trade Fair Cities by Rank (a) 1964, (b) 1990, and (c)  
956 2005 (Source: Zelinsky, 1995; CEIR, 2005)

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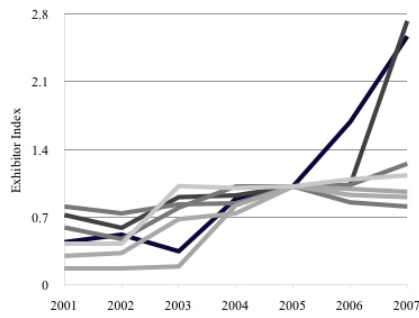
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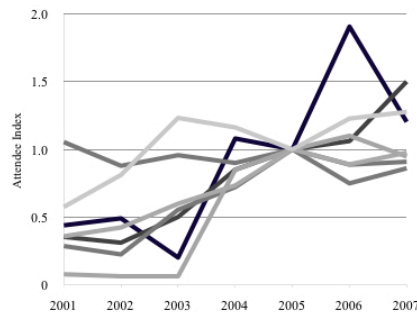
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960 Figure 2: Total Number and Average Square Footage of North American Trade Fairs,  
961 2001-2007 (Source: CEIR, 2005; 2007)  
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(a)



(b)



(c)

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Figure 3: (a) Number of Trade Fairs, (b) Index of Trade Fair Exhibitors (2005=1.0), and (c) Index of Trade Fair Attendees (2005=1.0) in the Top 25 North American Trade Fair Cities by Selected Industrial Sectors, 2001-2007 (Source: CEIR, 2005; 2009)

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| Industrial Sector  | Exhibitors per Event |      |      | Attendees per Event |        |        | Average Size of Event<br>(Square Feet) |         |         |
|--|----------------------|------|------|---------------------|--------|--------|--|---------|---------|
|  | 2001                 | 2004 | 2007 | 2001                | 2004   | 2007   | 2001                                   | 2004    | 2007    |
| Professional Business Services (BZ)                            | 308                  | 408  | 461  | 5,623               | 6,350  | 6,586  | 61,324                                 | 81,761  | 104,670 |
| Consumer Goods and Retail Trade (CG)                           | 776                  | 706  | 720  | 16,156              | 14,502 | 15,210 | 220,531                                | 177,117 | 355,082 |
| Consumer Services, Sports, Travel, Entertainment, and Art (CS) | 397                  | 438  | 520  | 9,726               | 11,402 | 16,171 | 123,308                                | 131,705 | 180,620 |
| Food (FD)  | 520                  | 399  | 981  | 8,965               | 12,924 | 19,010 | 174,853                                | 104,759 | 150,568 |
| Government, Public, and Non-Profit Services (GV)               | 113                  | 216  | 265  | 2,700               | 3,767  | 5,009  | 15,847                                 | 39,428  | 55,402  |
| Construction, Building, Home, and Repair (HM)                  | 563                  | 374  | 369  | 18,665              | 27,169 | 25,970 | 246,055                                | 116,368 | 107,642 |
| Industrial/Heavy Machinery and Finished Business Inputs (ID)   | 639                  | 712  | 495  | 7,837               | 12,069 | 8,098  | 125,393                                | 176,935 | 165,002 |
| Information Technology and Communications (IT)                 | 189                  | 178  | 226  | 6,353               | 5,259  | 6,489  | 61,828                                 | 54,308  | 66,606  |
| Medical and Health Care (MD)                                   | 197                  | 219  | 242  | 4,776               | 4,828  | 5,364  | 65,987                                 | 73,380  | 78,319  |
| Raw Materials and Science (RM)                                 | 267                  | 329  | 898  | 7,254               | 10,909 | 11,510 | 65,062                                 | 116,139 | 220,209 |
| Transportation (TX)  | 199                  | 234  | 249  | 20,714              | 20,173 | 16,229 | 89,239                                 | 120,176 | 104,696 |
| Unweighted Average   | 379                  | 383  | 494  | 9,888               | 11,759 | 12,331 | 114,755                                | 113,509 | 167,980 |

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Table 1: Average Number of Exhibitors, Attendees, and Square Footage of North American Trade Fairs, 2001, 2004, and 2007 (Source: CEIR, 2005; 2007)

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| Rank  | City              | Number and Share of Trade Fairs<br>by Business Focus |                                |     |                                |     |
|-------|-------------------|--|--------------------------------|-----|--------------------------------|-----|
|       |                   | Total  | Business-to-<br>Business (B2B) |     | Business-to-<br>Consumer (B2C) |     |
| 1     | Las Vegas, NV     | 780  | 718                            | 92% | 62                             | 8%  |
| 2     | Toronto, ON       | 605  | 224                            | 37% | 381                            | 63% |
| 3     | Orlando, FL       | 582  | 547                            | 94% | 35                             | 6%  |
| 4     | Atlanta, GA       | 478  | 387                            | 81% | 91                             | 19% |
| 5     | Chicago, IL       | 431  | 397                            | 92% | 34                             | 8%  |
| 6     | New York, NY      | 419  | 373                            | 89% | 46                             | 11% |
| 7     | Dallas, TX        | 344  | 261                            | 76% | 83                             | 24% |
| 8     | San Diego, CA     | 338  | 314                            | 93% | 24                             | 7%  |
| 9     | New Orleans, LA   | 333  | 313                            | 94% | 20                             | 6%  |
| 10    | Washington, DC    | 294  | 273                            | 93% | 21                             | 7%  |
| 11    | Houston, TX       | 229  | 165                            | 72% | 64                             | 28% |
| 12    | San Antonio, TX   | 226  | 199                            | 88% | 27                             | 12% |
| 13    | Denver, CO        | 222  | 164                            | 74% | 58                             | 26% |
| 14    | San Francisco, CA | 222  | 206                            | 93% | 16                             | 7%  |
| 15    | Boston, MA        | 210  | 176                            | 84% | 34                             | 16% |
| 16    | Montreal, QC      | 198  | 121                            | 61% | 77                             | 39% |
| 17    | Anaheim, CA       | 193  | 172                            | 89% | 21                             | 11% |
| 18    | Nashville, TN     | 189  | 170                            | 90% | 19                             | 10% |
| 19    | Los Angeles, CA   | 181  | 141                            | 78% | 40                             | 22% |
| 20    | Ottawa, ON        | 179  | 102                            | 57% | 77                             | 43% |
| 21    | Vancouver, BC     | 177  | 99                             | 56% | 78                             | 44% |
| 22    | Austin, TX        | 169  | 134                            | 79% | 35                             | 21% |
| 23    | Seattle, WA       | 152  | 120                            | 79% | 32                             | 21% |
| 24    | Minneapolis, MN   | 151  | 119                            | 79% | 32                             | 21% |
| 25    | Phoenix, AZ       | 135  | 115                            | 85% | 20                             | 15% |
| Total |                   | 7437   | 6011                           | 81% | 1426                           | 19% |

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Table 2: Top 25 North American Trade Fair Cities by Business Focus, 2005 (Source: CEIR, 2005)



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| City                  | Number of Trade Fairs by Industrial Sector |              |             |             |             |             |             |              |             |             |             | Total |
|-----------------------|--|--------------|-------------|-------------|-------------|-------------|-------------|--------------|-------------|-------------|-------------|-------|
|                       | BZ   | CG           | CS          | FD          | GV          | HM          | ID          | IT           | MD          | RM          | TX          |       |
| Las Vegas, NV         | 127  | 114<br>(1.3) | 80          | 46<br>(1.2) | 42          | 53          | 28          | 111<br>(1.3) | 86          | 26          | 51<br>(1.7) | 780   |
| Toronto, ON           | 80   | 92<br>(1.4)  | 132         | 36<br>(1.2) | 42          | 38          | 16          | 48           | 60          | 28          | 21          | 605   |
| Chicago, IL           | 75   | 25           | 37          | 25<br>(1.2) | 45          | 20          | 21<br>(1.5) | 58<br>(1.2)  | 81<br>(1.3) | 19          | 12          | 431   |
| Dallas, TX            | 54   | 66<br>(1.7)  | 40          | 17          | 24          | 32<br>(1.5) | 10          | 22           | 32          | 10          | 20<br>(1.6) | 344   |
| San Diego, CA         | 61   | 21           | 23          | 11          | 52<br>(1.5) | 5           | 7           | 47<br>(1.3)  | 75<br>(1.6) | 19          | 12          | 338   |
| Washington, DC        | 45   | 9            | 20          | 8           | 68<br>(2.2) | 5           | 3           | 36           | 74<br>(1.8) | 14          | 9           | 294   |
| Houston, TX           | 35   | 20           | 34<br>(1.2) | 11          | 29<br>(1.2) | 24<br>(1.7) | 13<br>(1.8) | 11           | 15          | 18<br>(1.6) | 11<br>(1.3) | 229   |
| San Antonio, TX       | 30   | 12           | 21          | 16<br>(1.5) | 37<br>(1.6) | 16          | 5           | 17           | 31<br>(2.1) | 24          | 9           | 226   |
| San Francisco, CA     | 35   | 15           | 16          | 7           | 29<br>(1.2) | 6           | 4           | 54<br>(2.2)  | 38<br>(1.2) | 13<br>(1.2) | 3           | 222   |
| Montreal, QC          | 16   | 24           | 56<br>(2.2) | 11<br>(1.2) | 7           | 13          | 10<br>(1.6) | 15           | 23          | 10          | 9<br>(1.2)  | 198   |
| Ottawa, ON            | 29   | 12           | 50<br>(2.2) | 6           | 14          | 9           | 9<br>(1.6)  | 13           | 15          | 10          | 9<br>(1.3)  | 179   |
| Vancouver, BC         | 24   | 26<br>(1.3)  | 46<br>(2.0) | 11<br>(1.3) | 6           | 8           | 1           | 17           | 22          | 11<br>(1.2) | 5           | 177   |
| Austin, TX            | 14   | 13           | 22          | 4           | 35<br>(2.0) | 13<br>(1.2) | 7<br>(1.3)  | 16           | 21          | 16<br>(1.9) | 3           | 169   |
| Minneapolis, MN       | 23   | 19           | 14          | 3           | 12          | 18<br>(1.9) | 8<br>(1.7)  | 8            | 23          | 14<br>(1.9) | 6<br>(1.1)  | 151   |
| Phoenix, AZ           | 18   | 12           | 17          | 8<br>(1.2)  | 17<br>(1.2) | 15<br>(1.7) | 5<br>(1.2)  | 10           | 21          | 9<br>(1.3)  | 3           | 135   |
| Total (top 25 cities) | 1129                                       | 827          | 944         | 355         | 781         | 473         | 233         | 813          | 1054        | 374         | 281         | 7437  |

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Notes: (i) Trade Fair Location Quotients  $\geq 1.2$  ( $\geq 2.0$ ) in parenthesis ( $\geq 2.0$  highlighted).

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(ii) Industrial Sector abbreviations: BZ = Professional Business Services; CG = Consumer Goods and Retail Trade; CS = Consumer Services, Sports, Travel, Entertainment, and Art; FD = Food; GV = Government, Public, and Non-Profit Services; HM = Construction, Building, Home, and Repair; ID = Industrial/Heavy Machinery and Finished Business Inputs; IT = Information Technology and Communications; MD = Medical and Health Care; RM = Raw Materials and Science; TX = Transportation.

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(iii) Uncategorized fairs removed from table.

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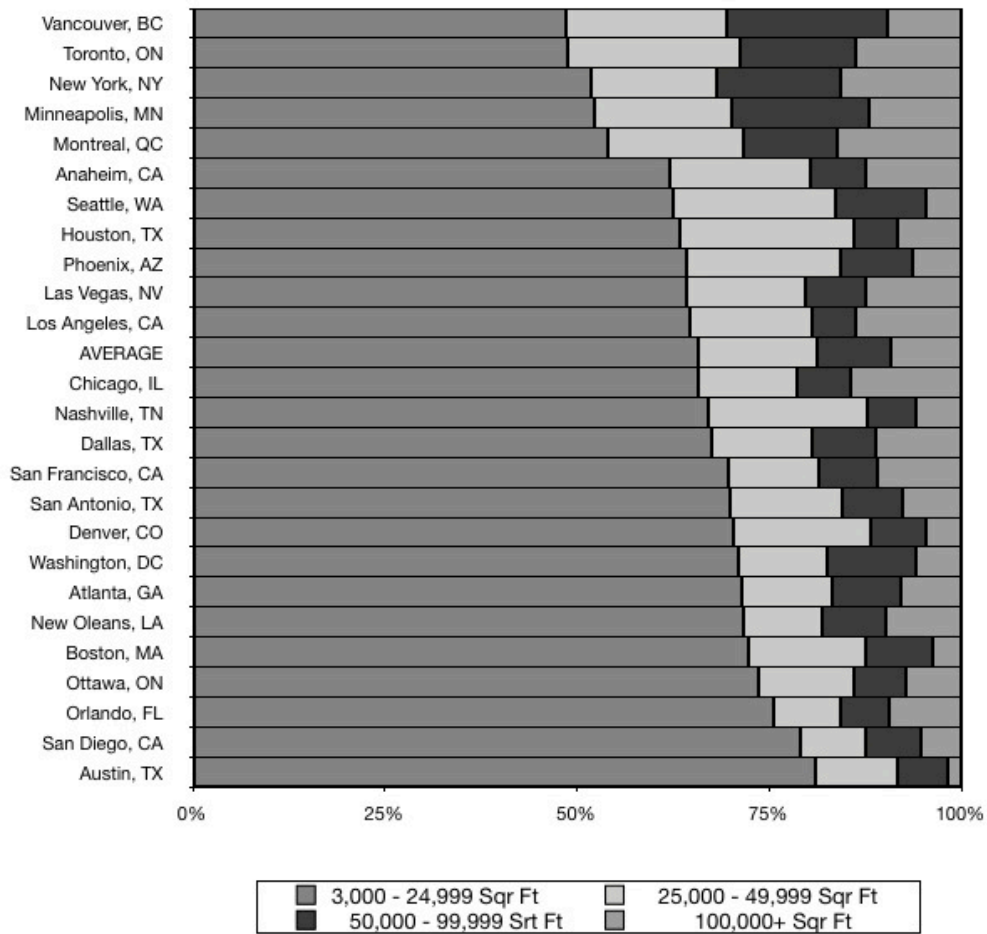
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Table 3: Number of Trade Fairs by Industrial Sector in Selected North American Trade

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Fair Cities, 2005 (Source: CEIR, 2005)

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 994 Figure 4: Number of trade Fairs by Size Category in the Top 25 North American Trade  
 995 Fair Cities, 2005 (Source: CEIR, 2005)

996 **Notes**

<sup>1</sup> Our focus is on U.S. and Canadian trade fairs, which are comparable in terms of their development stage.

<sup>2</sup> Both trade fairs and conventions are often held in the same trade fair, convention, conference, or exhibition spaces. Conventions and conferences are regular, highly mobile events that are centered on professional presentations and typically take place in different cities, exhibitions and trade fairs (or trade shows) are focused on the exhibit of products and technology. In contrast to exhibitions, which are singular events, trade fairs are periodic events that provide a regular platform for observation, learning and communication between the firms of technology or value chain.

<sup>3</sup> The importance of such temporary spaces has also been recognized in studies of periodic markets in the context of less developed economies (McKim, 1972; Udosen and Adams, 2009). Even though medieval trade fairs and 19th century world exhibitions were already more than just events where products were displayed or sold (Piore and Sabel, 1984), the aspect of knowledge creation during such events has only recently become a key aspect of academic debates.

<sup>4</sup> Global buzz differs between different types of trade fairs. It is clearly strongest in international fairs, but is also present to some degree in less wide-ranging events.

<sup>5</sup> In general, it is difficult to study trade fairs because available data is incomplete, definitions differ between countries, or there is no central database (Kresse, 2003; AUMA, 2009a).

<sup>6</sup> We conducted one-hour exploratory interviews with trade fair organizers in Las Vegas and Toronto.

<sup>7</sup> An important factor influencing the location of trade fairs was associated with costs which differ greatly between small and large urban centers, and between places in the Sunbelt and Rustbelt (AUMA, 2009a). In general, unions had and still have a strong impact on trade fair activities as most convention and exhibitions centers have contractual agreements with them. Wages for specialists, which are hired to build the exhibits, also

differ greatly. According to AUMA (2009a), a carpenter in Louisville, KY earned about \$45 per hour while the same rate in New York was almost \$150 (and \$260 on weekends).

<sup>8</sup> In comparison, the Mexican trade fair industry developed much later than that in the U.S. and Canada, triggered by globalization processes and the opening of the Mexican market since the 1980s. The respective events have remained relatively small with typically less than 5,000 m<sup>2</sup> (54,000 square feet). According to AUMA (2004b), an average Mexican trade fair had about 100 exhibitors and 7,500 attendees.

<sup>9</sup> Such misjudgment is even more problematic in the case of singular events such as World Exhibitions, which require huge investments (see Diez and Kramer, 2000; Kaiser, 2002). However, there are also examples of trade fairs serving to alleviate economic downturns associated with deindustrialization. For example, High Point Market – a bi-annual international furniture trade fair that attracts over 85,000 participants – has helped the city of High Point, North Carolina adapt to the decline of the local furniture manufacturing industry (High Point Market, 2010).

<sup>10</sup> It appears that this trend has not been reversed through the 2008 global financial crisis. Although small and medium-sized regional fairs seem to have suffered, the large international fairs have been less affected, as the example of Las Vegas exemplifies (Velotta, 2009).

<sup>11</sup> While the building, construction, and home repair sector saw the largest growth, this was also related to a change in the way the CEIR data was collected in 2004.

<sup>12</sup> Trade fair location quotients are defined as ratios of the local importance of a sector relative to its importance in the top 25 North American cities overall. These quotients are calculated as  $TFLQ = (e_i / e) / (E_i / E)$  where  $e_i$  is a city's representation of trade fairs in sector  $i$ ;  $e$  is the total number of trade fairs in the city;  $E_i$  is the total number of trade fairs in sector  $i$ ; and  $E$  the total number of trade fairs in the overall data set. It is important to note that this data set only covers the top 25 trade fair cities in North America, so the TFLQs are measured against those cities, and not the entire set of trade fairs in North America.

<sup>13</sup> The consumer goods sector is made up of fairs where retail products are presented by manufacturers to retail store buyers. In the case of Montreal, the high TFLQ of this sector may also be related to the vibrant cultural economy in the city.

<sup>14</sup> Media reports suggest that revenues from trade fair attendees are possibly even larger than those from gambling (Spillman, 2007). Moreover, employment effects of large international trade fairs are substantial, adding some direct 2,000 jobs to the regional economy – not including the indirect employment effects.

<sup>15</sup> However, trade fair officials at the MTCC raise doubts over how many local firms actually attend larger international events held in the city (Interview with MTCC officials, July 2009).