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# Manufacturing & Industrial

## Exhibition & Event Marketing Trends & Outlook

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**Skyline**<sup>®</sup> **Tradeshow Week**  
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An exclusive industry analysis by  
**Skyline Exhibits** & **Tradeshow Week**



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# INTRODUCTION

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**Skyline Exhibits** and **Tradeshow Week** magazine have worked together to develop this exclusive report on the trends impacting the manufacturing and industrial industries and how they are changing exhibition and event marketing programs.

Manufacturing and industrial exhibit marketers face issue such as global competition, rising costs and a shrinking workforce, and many exhibitors are unsure how these trends will impact their exhibit marketing programs. The report studies the impact of wider industry trends on exhibit design and usage.

The data in this report was gathered from surveys and interviews with leading exhibitors in the manufacturing and industrial industries. Other information sources include **Tradeshow Week Executive Outlook**, **Tradeshow Week 200** as well as the U.S. Department of Labor, PricewaterhouseCoopers and the National Association of Manufacturers.

The report is outlined as follows:

- Executive Summary
- Trends Impacting the Manufacturing and Industrial Industries
- How Manufacturing and Industrial Trends Impact Exhibiting
- Exhibitor and Event Marketing Trends and Survey Results
- Conclusion

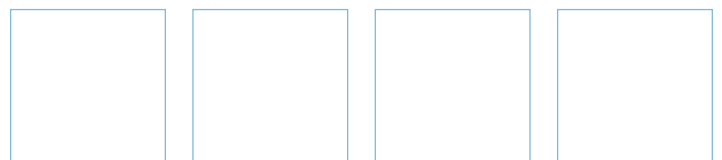
The report will help exhibitors and event marketers analyze the trends that are impacting their exhibit programs and exhibit designs.

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The logo for Tradeshow Week features the letters "TSW" in a large, gold, 3D-style font. Above the "W" is the text "Tradeshow Week" in a smaller, red, sans-serif font.

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## EXECUTIVE SUMMARY

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- In 2006, the largest manufacturing and industrial conventions and exhibitions grew by 1.1% in net square feet, 1.4% in the number of exhibiting companies, and 2.6% in attendance. (Source: *Tradeshow Week 200*)
- The manufacturing sector continues to account for 14% of U.S. GDP and 11% of total U.S. employment.
- In January 2007, *Tradeshow Week* Research conducted a survey of manufacturing and industrial event exhibitors; 68% of the exhibitors taking part in the study said they have changed their exhibit design to reflect industry and business changes.
- About three out of five exhibitors indicate their market has been impacted by manufacturing business moving out of North America.
- Below are some of the responses exhibitors provided regarding the way they changed their exhibit programs as a result of manufacturing business moving outside North America:
  - "Diversified our message to address international prospects. Greater participation by our international office personnel."
  - "More international shows."
  - "We are looking to expand internationally."
  - "We are more aggressive to foreign competition with our products."
  - "We are now looking at exhibiting overseas."
  - "We have concentrated on upgrading our presentation (size/quality)."
  - "We now exhibit in China."
- The top methods used by exhibit marketers to compete with lower cost overseas manufacturers are:
  - 1. Emphasis on quality: 65%
  - 2. Booth personnel is focused on describing added value: 62%
  - 3. Manning the booth with executive staff: 28%
- Two out of three exhibitors believe that demographics are impacting their industry and shows; and about half of this group indicates "attendance levels are lower as waves of executives and managers retire in our industry."
- More than half of the exhibitors (54%) taking part in the survey indicated booths today are "more high tech, upscale, showier" than in the past three to five years.
- "Drayage costs" are the most common concern among exhibitors.
- In 2007, the marketing expenditures at greatest risk of cutbacks will be:
  - 1. Sponsorships: 43% of the survey respondents
  - 2. Exhibit design/production/refurbishing: 38%
  - 3 Promotion: 31%
  - 4. Travel, lodging & entertainment: 29%
  - 5. Exhibit space: 25%
- "Tradition" is the number one event selection criteria used by exhibitors when considering which events to exhibit at.
- About half of the event marketers in the manufacturing and industrial industry have seen some portion of their event-marketing budget shifted to alternative marketing mediums.
- Only 35% of manufacturing and industrial exhibitors are measuring either Return on Investment (ROI) and/or Return on Objectives (ROO).
- Of those that measure ROI and/or ROO, three out of four exhibitors expressed confidence that their ROI and/or ROO will increase in 2007 vs. 2006.



# TRENDS IMPACTING THE MANUFACTURING AND INDUSTRIAL INDUSTRIES

The U.S. Department of Labor categorizes the manufacturing sector as a high growth industry. The workforce issues and skill sets that follow have been collected from the U.S. Department of Labor.

## Industry Overview

The manufacturing sector continues to account for 14% of U.S. GDP and 11% of total U.S. employment. Moreover, manufacturing firms fund 60% of the \$193 billion that the U.S. private sector invests annually in research and development. (U.S. Department of Commerce)

Manufacturing salaries and benefits average \$54,000, higher than the average for the total private sector. Two factors in particular attract workers to manufacturing: higher pay and benefits, and opportunities for advanced education and training. (National Association of Manufacturers)

A recent survey of U.S. manufacturing employers found that 80% of respondents said that they had a serious problem finding qualified candidates for the highly technical world of modern manufacturing. (National Association of Manufacturers)

## National Association of Manufacturers

According to the National Association of Manufacturers, manufacturing is the engine that drives American prosperity. It is central to our economic security and national security. Manufacturing:

- Grows the economy. Every \$1.00 in manufactured goods generates an additional \$1.37 worth of additional economic activity - more than any other economic sector.
- Invents the future. Manufacturers are responsible for almost three-fourths of all private sector R&D, which ultimately benefits other manufacturing and non-manufacturing activities.
- Competes internationally. The United States is the world's largest exporter; 62 percent of all U.S. exports are manufactured goods, double the level of 10 years ago.
- Generates productivity increases. Over the past two decades manufacturing productivity gains have been double that of other economic sectors. These gains enable Americans to do more with less, increase our ability to compete and facilitate higher wages for all employees.
- Pays the taxes. Manufacturing has been an important contributor to economic growth and tax receipts at all levels of government, contributing one-third of all corporate taxes collected by state and local governments.
- Yet U.S. manufacturers are challenged as never before. They are on the front lines of the most intense global competition in history where it is virtually impossible to raise prices. Yet, costs do rise, often because of what government does or does not do. The NAM and the Coalition for the Future of Manufacturing are taking this message to policy-makers, the news media and all Americans; and advocating pro-manufacturing public policies.

## Strengths

All too often the perception is that the heyday of U.S. manufacturing is in the past, but nothing could be further from the truth. Standing by itself, U.S. manufacturing would be the eighth largest economy in the world. Manufacturing:

- Makes the highest contribution to economic growth of any sector;
- Is responsible for more than 70 percent of private sector research and development and the center for a wide range of advanced technologies that cut energy use and lead to a cleaner environment;
- Achieves a high productivity rate year in and year out, increasing by more than 50 percent in the past decade;
- Pays wages and benefits that are about 25 percent higher than in non-manufacturing jobs.

## Challenges

Even with these strengths, there are many challenges for manufacturers, especially in the area of costs and encouraging young people to pursue a career in manufacturing. Eighty one percent of respondents to the Institute/NAM 2005 Skills Gap survey said they could not find qualified workers to fill open positions. Structural costs such as taxes and health care add 31.7 percent to U.S. manufacturing costs, making it more difficult to produce from a U.S. base.



## KEY ISSUES IMPACTING U.S. AND CANADIAN MANUFACTURING & INDUSTRIAL COMPANIES

Many of the key challenges and opportunities impacting the North American manufacturing and industrial industries are outlined below. The source data is provided from surveys and interviews with leading exhibitors in the manufacturing and industrial industries. Information from the National Association of Manufacturers and the U.S. Department of Labor has also informed this section of the report.

### Costs

Rising manufacturing costs in the U.S. are largely due to corporate taxes, healthcare and pensions, government regulation, increasing price of natural gas and tort litigation.

### Shrinking Workforce

Skilled workers are retiring; encouraging young employees to pursue a career in manufacturing has become a hard sell.

### Global Competition

Maintaining the manufacturing edge in the U.S. is increasingly difficult when stacked against emerging economies around the world. Domestic manufacturers face decreased prices for manufactured goods while production costs continue to rise. Foreign competitors often benefit from lower labor costs and less regulation. U.S. manufacturers face low-cost foreign competition in both their export and domestic markets.

### New Technology

Manufacturers today are pushed to innovate by customers who continuously expect more. Technologies must be constantly updated. The costs are draining, particularly for smaller and mid-sized manufacturers.

### Changing Customer Demands and/or Consolidation

Some changing customer demands are brought on by shifting consumer behavior, population demographics, economic forces and company consolidation.

### Research and Development Funding Challenged

Since the end of the recession, manufacturing output has increased 15%, but that is only half its average pace during earlier expansions. With manufacturing output on the rise overseas, the U.S. share of worldwide research and development funding is expected to decrease as money is shifted to foreign competitors.



## HOW MANUFACTURING & INDUSTRIAL TRENDS IMPACT EXHIBITING

In January 2007, *Tradeshow Week* Research conducted a survey of manufacturing and industrial event exhibitors. The survey included questions on the state of the industry and how those trends impact exhibit marketing.

About three out of five exhibitors indicate their market has been impacted by the manufacturing business moving out of North America.

**SURVEY QUESTION:** Has your market or markets been impacted by manufacturing business moving outside of the U.S. and Canada?

	Manufacturing & Industrial
Yes	62%
No	38%

**IN A FOLLOW UP QUESTION WE ASKED EXHIBITORS,** “If your organization has been impacted by manufacturing business moving outside of the U.S. and Canada, how has this changed the way you participate in U.S. and Canadian conventions and tradeshows?”

Exhibitors that are adjusting to the manufacturing business moving outside the U.S. are adding an international component to their booth as well as clear messages and emphasis on quality. However, there are still a noticeable percentage of exhibitors who said they have not made changes.

Below are some of the responses exhibitors provided regarding their changing participation in tradeshows as a result of manufacturing business moving outside of North America:

- “Considering exhibiting at shows outside U.S.”
- “Diversified our message to address international prospects. Greater participation by our international office personnel.”
- “Has not affected our attendance...makes shows even more necessary in a competitive business environment.”
- “I have noticed that shows are smaller, and many are consolidating. We are doing smaller booths.”
- “More distribution channels representing our products world-wide.”
- “More international shows.”
- “We are looking to expand internationally.”
- “We are more aggressive to foreign competition with our products.”
- “We are now looking at exhibiting overseas.”
- “We have concentrated on upgrading our presentation (size/quality).”
- “We have gone overseas for more component parts and for some complete machines.”
- “We have scaled down the size of our booths and number of personnel at the shows.”
- “We include our Canadian offerings in our U.S. tradeshows.”
- “We now exhibit in China.”
- “We participate in fewer events. Larger regional shows or international shows are preferred.”
- “We participate in tradeshows in the U.S. as well as internationally.”



**SURVEY QUESTION:** How is your organization utilizing exhibit marketing to compete with lower cost overseas manufacturers? (Please check all that apply.)

	Manufacturing & Industrial
Emphasis on quality	65%
Booth personnel is focused on describing added value	62%
Manning the booth with executive staff	28%
Displaying more high end equipment in the booth	23%
Using computers to show the benefits of our high end equipment	14%
Booth personnel is focused on describing low cost options	12%
None of the above	15%
Other	11%

### Additional Event Marketing Issues

In addition to foreign competitors, domestic manufacturers and their exhibit marketers are reacting to staff issues, evolving technologies and rising costs. The chart below demonstrates how certain industry issues influence exhibit marketers.

Key Issues Impacting U.S. and Canadian Manufacturing & Industrial Companies	The Impact on Exhibiting and Event Marketing
Rising costs; streamlined operations to satisfy shrinking margins	Internal budget issues and the charge to do more with less
Changing customer demands	Face to face marketing provides an opportunity to meet clients and find solutions to their changing needs
Consolidation	Booth design may highlight a re-branding strategy. Leveraging low price points, industry expertise, product and service values
Shrinking workforce	Fewer personnel staffing the booth
Evolving technologies	Meeting clients and contacts to find new product ideas and how technologies can meet their requirements; hands on demos
Competing in the global marketplace	Adding an international component to the booth, exhibiting over seas, booths are more high tech, upscale, showier than in the past



## EXHIBITOR AND EVENT MARKETING TRENDS AND SURVEY RESULTS

The following survey findings were compiled from hundreds of manufacturing and industrial exhibitors. The survey fielded in January 2007. Topics include buyer needs and changes over the past few years, current exhibit booth design trends, staffing, event selection, attendee marketing, lead follow up and more.

### Attendees

The U.S. population is facing an unprecedented generational shift in the workforce as Baby Boomers retire and tech-savvy employees from Generation Y replace them. Two out of three exhibitors believe that demographics are impacting their industry and shows; and about half of this group indicates “attendance levels are lower as waves of executives and managers retire in our industry.”

In 2005, *Tradeshow Week* Research conducted a similar study of manufacturing exhibitors. In that study, just two years ago, a full 46% of exhibitors said there are “no demographic changes of note.” Today just 17% said there are “no demographic changes of note.” This is a significant shift, and may be a sign to marketers that attendees today are going to evaluate products with a different agenda than in the past.

In fact, exhibitors are adjusting to the changing dynamic of attendees. Some of those changes include more vigorous lead follow up than in the past, showcasing company specific expertise, and spending more time in the booth with attendees who are interested and have buying power.

### SURVEY QUESTION: How have attendees changed in the past year or two?

	Manufacturing & Industrial
Attendees are MORE informed about our products and services than in the past	44%
FEWER attendees are higher-level executives and buyers	32%
MORE attendees are higher-level executives and buyers	23%
Attendees are spending LESS time in the booth	21%
Attendees are spending MORE time in the booth	17%
Attendees are LESS informed about our products and services than in the past	10%
No change	10%
Other, please describe	7%



**Exhibits**

In today’s climate, with constant industry change and new technology and product offerings, almost half of exhibitors (41%) are using custom (full-scale) booths. Perhaps as a result of cost cuts, or an effort to cut drayage fees, one-quarter of the manufacturing and industrial exhibitors said they use a pop-up booth. Overall, 90% said it is either “very” or “moderately important” to use exhibit structures and properties that provide flexibility and the ability to change out graphics or easily adapt for different booth sizes.

More than half of the exhibitors (54%) taking part in the survey indicated booths today are “more high tech, upscale, showier” than in the past three to five years. One-quarter are including “increased meeting space in the booth.”

**SURVEY QUESTION: What are the “must have” features in your booth today?**

	<b>Manufacturing &amp; Industrial</b>
<b>Lead capture technology</b>	<b>62%</b>
<b>Cutting-edge signs/graphics</b>	<b>60%</b>
<b>Bright lighting</b>	<b>58%</b>
<b>Flat panel video screens</b>	<b>38%</b>
<b>Video presentation</b>	<b>26%</b>
<b>Deluxe carpeting</b>	<b>18%</b>
<b>Cool freebies</b>	<b>11%</b>
<b>Wireless Internet connection</b>	<b>11%</b>
<b>Music</b>	<b>4%</b>
<b>Other, please describe</b>	<b>11%</b>

Two in five exhibitors said they are “demonstrating more equipment in the booth today than in the past three to five years.” Exhibit design is evolving: 68% of the exhibitors taking part in the study said they have changed their exhibit design to reflect industry and business changes.

**SURVEY QUESTION: If you have changed the way you use exhibits and/or your exhibit design, please describe what you have done.**

The exhibitor responses below have been selected to indicate some of the ideas in current booth design and usage. “Drayage costs” are the most common concern among exhibitors. The broad range of ideas below may indicate a time of transition.

**More space**

- “Larger booth space, pop-up fabric booths.”
- “We have designed our exhibit to be more spacious and less clutter/crowding of products in a small space.”
- “Less flash, more office space, meeting areas.”

**Product focus**

- “Redirecting graphics to highlight new technologies. Increased focus on new product demonstrations/displays.”
- “We have made it much more product-oriented.”



**Value added**

- “Promote solution or customization capabilities.”
- “New design for tradeshow booth...offer solutions to buyers.”

**New Banners and Graphics**

- “New banners, new tradeshow graphics and hardware to keep our attendees focused on our newer product lines.”
- “More video, more customized graphics with photos specific to the particular industry.”
- “New booth, interactive software on a laptop, LED screens.”

**Lightweight (reduced drayage)**

- “Using a system that is lightweight and folds to a tight profile for shipping and drayage.”
- “All pop-ups and tabletop displays.”
- “Use portable booth equipment for ease of use and less cost.”
- “Less material, lighter weight material.”

**Versatility (changing themes)**

- “We are using smaller, more versatile booth that can be changed for different shows.”
- “Leverage lightweight, flexible, configurable exhibit systems that allow us to more easily modify our message.”

**Demos**

- “More demonstrations to show innovation.”
- “More proactive, hands-on, product demonstrations as well as live demonstrations.”
- “More emphasis on demos of what equipment we do bring.”

**Miscellaneous**

- “Added elements such as music, food samples, consumer research.”
- “More emphasis on the complete process, not just machinery.”
- “Shows are used more as networking opportunities with existing customers rather than as a way to acquire new customers.”

Booth staffing has also changed in the past three to five years. In general, exhibitors are bringing fewer personnel to shows, but those that go have more training. The key trends in booth staffing are:

1. Fewer personnel staffing the booth: 45%
2. More executives and senior management staffing the booths: 28%
3. More training for booth personnel today than in the past: 28%



## Tradeshow Budgets

Budgets for manufacturing and industrial exhibitors have seen slow growth over the past few years. Slow budget growth has been the norm in the larger exhibition and events industry as well. In 2007, the marketing expenditures at greatest risk of cutbacks will be:

1. Sponsorships: 43% of survey respondents
2. Exhibit design/production/refurbishing: 38%
3. Promotion: 31%
4. Travel, lodging & entertainment: 29%
5. Exhibit space: 25%

### **SURVEY QUESTION:** What is your company's 2007 tradeshow budget?

	Manufacturing & Industrial
Less than \$10,000	3%
\$10,000 - \$24,999	4%
\$25,000 - \$49,999	10%
\$50,000 - \$99,999	18%
\$100,000 - \$249,999	24%
\$250,000 - \$499,999	14%
\$500,000 - \$749,999	7%
\$750,000 - \$999,999	7%
\$1,000,000 - \$2,500,000	10%
More than \$2,500,000	3%
<b>Average Annual Budget</b>	<b>\$457,325</b>



**SURVEY QUESTION:** What percentage of your 2007 tradeshow budget do you anticipate spending on the following?

	<b>Manufacturing &amp; Industrial</b> (Average percentage of budget)
<b>Exhibit space</b>	<b>34%</b>
<b>Exhibit design and production</b>	<b>14%</b>
<b>Show services</b>	<b>14%</b>
<b>Exhibit freight shipping</b>	<b>13%</b>
<b>Exhibit staffing and training</b>	<b>11%</b>
<b>Exhibit promotion and sales</b>	<b>9%</b>
<b>Other exhibit-related items</b>	<b>5%</b>

**Event Selection**

“Tradition” is the number one event selection criteria used by exhibitors when considering which events to exhibit at.

**SURVEY QUESTION:** How do you select which events to exhibit at? (Please check all that apply.)

	<b>Manufacturing &amp; Industrial</b>
<b>Tradition, we exhibit at the same shows annually</b>	<b>62%</b>
<b>Attendee demographics</b>	<b>47%</b>
<b>Whether competitors are exhibiting or sponsoring</b>	<b>40%</b>
<b>Attendance numbers, projections</b>	<b>38%</b>
<b>Perceived ROI or ROO opportunity</b>	<b>38%</b>
<b>Lead gathering opportunity</b>	<b>37%</b>
<b>Other</b>	<b>7%</b>

Three out of four exhibitors believe senior management at their organization considers non-traditional convention and tradeshow event marketing “more” or “equally important” today than they did two years ago.

In the next few years, 84% of exhibitors anticipate that their organization will participate in “about the same” or “more” non-traditional events. The most common non-traditional marketing programs that exhibitor organizations either run or participate in are:

1. Sales meetings: 73%
2. Training programs: 68%
3. Conferences: 54%
4. Incentive programs: 39%
5. Corporate sponsorship programs: 36%

Two out of three manufacturing and industrial event marketers indicate “tradeshows provide a higher ROI” than private events.

### Marketing

About half of event marketers in the manufacturing and industrial industry have seen some portion of their event marketing budget shifted to alternative marketing mediums. One quarter of the event exhibitors said “web sites” received the shifted funds. Shifting funds to company web sites does not necessarily have a negative impact on exhibit marketers. In a separate survey conducted in the fourth quarter of 2006, 83% of all event exhibitors surveyed saw the internet as an “opportunity.” In many cases the internet is used as a tool to enhance event marketing campaigns.

**SURVEY QUESTION:** In 2006, which alternative marketing mediums received funds that were shifted away from your event-marketing budget?

	Manufacturing & Industrial
No funds are being shifted	47%
Web sites	25%
Sales force	18%
Trade magazine advertising	18%
Marketing partnerships	11%
Email marketing	8%
Public relations	8%
Direct mail and catalogs	7%
Other	4%

### Return on Investment (ROI) or Return on Objectives (ROO)

Despite the need to justify exhibitor budgets, only 35% of manufacturing and industrial exhibitors are measuring either Return on Investment (ROI) and/or Return on Objectives (ROO). Typically “sales leads gathered at the event” (71%) and “number of booth visitors” (46%) are used by manufacturing and industrial exhibitors to determine ROI and/or ROO.

Of those that measure ROI and/or ROO, 82% said results “stayed about the same” or “increased” in 2006 vs. 2005. Exhibitors remain confident that their investments in tradeshows will continue to pay off going forward. Three out of four exhibitors expressed confidence that their ROI and/or ROO will increase in 2007 vs. 2006.



## CONCLUSION

The manufacturing industry is in a period of rapid change and increased competition. Clients are demanding more, and evolving technologies are changing capabilities. Low production costs enjoyed by many foreign manufacturers is causing increased competition as well as shrinking demand for U.S. exports. Exhibit marketers are trying to find their footing in this shifting landscape.

The message for manufacturing and industrial exhibitors is to focus on the following themes:

**DRAYAGE COSTS** – Most exhibitors rank drayage costs as the number one issue currently facing their exhibit marketing program. Evaluating lightweight materials and a critical review of necessities at the show can reduce drayage costs. In some cases a more accurate and up front assessment of drayage rates will keep an exhibitor within budget. Cost may not be a detriment if, for example, lugging heavy equipment demos to the booth translates into sales.

**MEASURING RETURN ON INVESTMENT (ROI) AND/OR RETURN ON OBJECTIVES (ROO)** – ROI and/or ROO are typically measured by actual sales, sales leads gathered at an event or visitors to the booth. An evaluation of exactly which factor inspired the sale may create a springboard to future sales. For example, did the pre-show marketing drive the buyer to the booth, was it the product demo in the booth (or the combination), or was it the post show follow up that won the client, etc. Quantifying this information is a useful tool to plan the entire event strategy. When appropriate, effectively communicating this data within an organization may help to determine whether funds are better spent on event marketing or should be shifted to alternative mediums.

**BOOTH STAFFING** – Exhibitors indicate that attendees are spending less time in the booth and are more informed about company products and services when they arrive. Personnel in the booth need to qualify attendees quicker and get their message across. The trend has been to bring less staff to man the booth, but also to provide them with better training.

**FLEXIBILITY** – Leading exhibitors keep pace with rapid changes in their industry and to their organization by retooling their booth from show-to-show. Using exhibit structures that provide flexibility is critical. Exhibitors need the ability to change out graphics to easily adapt for different booth sizes and to present a targeted message based on attendee demographics at different shows.

The data and analysis presented in this special report has been developed jointly by **Skyline Exhibits** and **Tradeshow Week**. The majority of the source data has been provided from a survey of hundreds of manufacturing exhibitors conducted in 2007. The report was developed to help exhibitors in the diverse manufacturing and industrial industry to understand the trends impacting their industry and event marketing programs. **Skyline Exhibits** and **Tradeshow Week** have developed the Manufacturing & Industrial Exhibition & Event Marketing Outlook as part of a series of reports. Three additional reports have been developed focused on the Medical & Healthcare, Information Technology, and Professional & Business Services industries. To access these reports, please go to [www.skyline.com/whitepapers](http://www.skyline.com/whitepapers).





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