

discover that third-country competitors have decimated the company's chances for export sales. Third, impact can be primary, that is directly related to a company's objectives, or secondary, when participation in a trade fair leads to awareness of ideas for product modification and innovation and hence improved prospects in other markets or in the future.

The complex nature of the impact on the user, on the economic environment, and on the provider, suggests, at a minimum, to screen for primary/secondary and intended/unintended effects. In the extreme one would require an arsenal of methods and measures to attempt evaluation. It is also clear, however, that qualitative case-by-case analysis of program users is a rich source of information and insight⁵⁷. There is a limit to such enquiry and a point at which it becomes dysfunctional (users' complaints about red tape would suggest this).

Evaluation must draw, on one hand, on survey methods, and on the other hand, on better measures of incrementality. The former stands to benefit significantly from electronic survey and feedback systems. The latter will improve as our understanding of companies' export behaviour advances. We have learned that meaningful information for public policy makers requires that program evaluation is viewed in a holistic context. Methods and measures of evaluation are inextricably linked to provider, user and their respective outcome goals and objectives.

What Is The Future Role of Trade Fairs and Missions?

Trade fairs are moving towards the concept of a global market place in one geographic location. For the main trade fair countries this means staging a global market place at home⁵⁸. Trade fairs are becoming more focused. There has been a trend towards greater specialization, and consequently less emphasis on *general* fairs. Advances in electronic media, such as instant communications via fax, video conferencing, data networks etc. have not displaced the need and desire for personal interaction among buyers and sellers, as some had speculated.

There is the view that the cost of trade fair participation and the growing importance of advertising, combined with the ability to communicate electronically - allowing for speedy feedback and follow-up - may lead to less trade fair use by exhibitors. This development would exert a cost for the visitor, however. While trade fairs allow exhibitors to step out of their impersonal role and personify themselves, duplicating such personal interaction outside of a trade fair would be far costlier for the company⁵⁹. The concept of personal relationship as a basis for business remains pervasive and pronounced in many parts of the world (note: Latin