

# Global Report on the Meetings Industry

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## Foreword:

Taleb Rifai, Secretary-General, World Tourism Organization (UNWTO)

The Meetings Industry has come of age. It has firmly placed itself at the centre of tourism as one of the key drivers of the sector's development and an important generator of income, employment and investment.

In addition to important business opportunities, the Meetings Industry provides immense benefits to the broader economy as it generates on average a higher spending level, reduces seasonality, contributes to the regeneration of destinations, spreads knowledge and enhances innovation and creativity.

This subject has been systematically studied by UNWTO for over a decade in cooperation with the main players in the industry. Milestones along the way include the definition of the scope of the Meeting Industry and the methodology required for the measurement of its economic contribution.

The present report builds on these results and offers a practical approach to the Meetings Industry focusing on the issues of marketing, the added value of business events, as well as on practical examples and best practices from the Americas, Asia and Europe, which we trust will provide valuable examples and essential insights and recommendations to this continually expanding tourism segment.

I would like to express our sincere appreciation to all UNWTO Members States, Affiliate Members, and other organizations

that have contributed to the UNWTO Global Report on the Meetings Industry. I trust that the information and case studies included in the following pages will prove useful to further the understanding of this specific segment and paving the way to seize the economic opportunities it will keep generating as tourism continues to expand over the coming decades.

UNWTO Secretary-General, **Taleb Rifai**



## Foreword:

Yolanda Perdomo, Director, UNWTO Affiliate Members Programme

This report is the result of a collaborative initiative of seven associations from the meetings industry united by the desire to strengthen this important segment: Meetings Professionals International (MPI), International Congress and Convention Association (ICCA), Asociación de Palacios de Congresos de España (APCE), Asociación de Ferias Españolas (AFE), Organización Profesional de Congresos (OPC Spain), Association of Spanish Destination Management Companies (DMCs Spain) y SITE Spain. Affiliate Members from around the world have come on board this project. All of them have shared their knowledge and experience to achieve the main goal of this publication: provide practical answers for those destinations that wish to specialize in the meetings industry.

Although the World Tourism Organization had published several comparative, measurement and methodological reports around this topic in the past, the sector was in need of also approaching it from a different perspective, one that would provide keys on what needs to be done and what should be avoided in order to successfully compete in the industry. Such an approach has been offered from the perspective that defines the Affiliate Members Programme, that of the tangible application of a public-private partnership model.

This report is also linked to a new tool aimed at applying the knowledge of our Members and the Organization in an

operative way. A tool that allows carrying out, in a scenario of vertiginous changes where previous models have become obsolete, a collective learning and innovation process for the search of joint solutions: the prototypes. These living analytical projects of the UNWTO Affiliate Members Programme are being applied in several areas of work, such as city tourism, the potentiation of the tourism value chain, and strategies for overcoming seasonality. Even though the meetings industry is crucial in all three cases, it is in this last area where the content of this report and the interaction generated between the different contributors have played a predominant role, since the meetings industry is one of the main elements of the prototype on innovative approaches of overcoming seasonality, which has as area of action the holiday destination of Punta del Este, in Uruguay.

The synergy has the magical ability to always make the results emerging from the collective work better than any individual input. This is the case in the Affiliate Members Programme, where we believe in collaboration, in the innovative force of interaction between members from different sectors, in the fostering of change and transformation, and where that same initial premise, that of synergy, is our greatest pride. I thank all contributors of this publication, whose drive has made possible for this report to generate a multiplier effect in our collective work for the promotion and visibility of the meetings industry within the tourism sector.



**ICCA**

# Prologue: ICCA's 50th Anniversary



*Arnaldo Nardone*

*President  
ICCA - International Congress  
and Conventions Association*

I congratulate UNWTO on this very important initiative, which I believe will play a major role in raising awareness about the importance of the international meetings sector, not just as a very high-value segment of the global tourism industry, but also as a much more wide-ranging contributor towards economic development and societal advancement, something that has not always been adequately understood at governmental level. I am proud on behalf of all our 1,000 member organizations and companies around the world that ICCA was one of the main collaborators with UNWTO in developing global standards for measuring the direct impact of meetings on a country's economy, and that we are now helping to raise awareness about the even greater impact that results from knowledge transfer and creation, from new investment and business partnership decisions, and from directly addressing some of our planet's most critical challenges precisely when we are celebrating our 50th anniversary.

We live at a time when all aspects of the travel, tourism and meetings business will come under ever greater scrutiny, to establish whether they are sustainable and add true value to the participants and their host destinations. It will no longer be sufficient to simply look at the volume of travel and the expenditure of the travellers. Instead, all sectors will have to become far more transparent about their total impact: are we helping to create local supply chains or merely adding to import costs; are we creating genuine opportunities for local career development at both entry and management levels; are we eroding unique cultural assets instead of raising awareness about how to protect them? These are some of the important questions that we all need to ask. Specifically in the meetings sector, we need to encourage and celebrate "good meetings",

those that create powerful positive impacts, and discourage the badly-conceived "junkets" that can give our industry a bad name. Thankfully, these latter examples are becoming very rare, as companies, associations and governments are all improving how they design meetings to better achieve the objectives of their organizations and their delegates.

We also live at a time of revolutionary change: when advances in science, technology, and healthcare are taking place at an ever increasing pace, when new products are coming to market in ever-faster development cycles, when inter-country relationships and global business connectivity are both moving forward relentlessly, when more information is generated in the last three years than in the previous history of mankind. At a time like this, growth in international meetings is inevitable; both to make sense of what is happening and to drive forward the next stage in the cycle of knowledge. Short-term shocks to regional economies may cause localized setbacks, and even faster development of meetings infrastructure may mask the growth with heightened levels of competition, but the underlying trends are undeniable. I thank our friends at UNWTO for helping raise awareness of these very important issues.



# Summary of Previous UNWTO Publications on the Meetings Industry

Before embarking on the current report it is vital to acknowledge the previous literature created within the UNWTO and understand the perceptions displayed through these in relation to the current topic. These have formed an essential part of the process by enriching our understanding of preceding insights, opportunities and challenges, and gaining an understanding of the contexts into which these have derived from.

It is also imperative to recognize how these enrich future forecasts through providing an overview of the social, political, economic, environmental and technological factors that have shaped tourism in the past and continue to shape it leading to development and growth in the future. Tourism Towards 2030 reaffirms the role of the UNWTO in agenda setting and research in tourism-related subjects and should also be considered when instigating further research projects. Additionally the UNWTO reports “Meetings Industry: An Asia-Pacific Perspective” and “Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension”, provide a solid grounding for understanding the Meetings Industry and its future prospects.

Following this, we intend to provide a practical approach to the Meetings Industry as a way to help and encourage new destinations and organizations to meet the requirements of a demanding and ever-changing industry.

## **Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension**

This UNWTO publication was a collaborative study between the World Tourism Organization and Affiliate Members Reed Travel Exhibitions, the International Congress & Convention

Association (ICCA) and Meeting Professional International (MPI), published in 2006. It arose as a method to address concerns raised by the UNWTO Department of Statistics and Economic Measurement of Tourism, and the Affiliate Members Programme in regards to how best measure the meetings industry’s linkage to tourism, and the extent to which the framework of the Tourism Satellite Account was capable of clarifying this linkage from a macroeconomic perspective.

The Tourism Satellite Account (TSA) is a measurement framework, based on the concepts, definitions and classifications of the System of National Accounts (SNA) developed to provide a credible measure of the economic contribution of the tourism sector. By using this framework it was hoped to broaden and strengthen the public’s recognition of the meetings industry within tourism, as well as providing a systematic approach to measuring the sectors economic contributions to the economy, and therefore the publication analyses the potential adoption of this method.

Additionally the report presents an overview of the current measurement system of the global Meetings Industry and the inherent gaps in this, including the differing definitions for meetings, and also provides a summary of the demand and supply data that must be collected in order to evaluate the Meetings Industry using the Tourism Satellite Account as a measurement framework.

To conclude, this study proposes methodological steps for adoptions as well as other issues worthy of consideration, and provides a notable approach to tackling issues surrounding the measurement of economic impacts within the Meetings Industry.

## Meetings Industry: An Asia-Pacific Perspective

The UNWTO report on the Meetings, Incentives, Conventions and Exhibitions industry from an Asia-Pacific perspective was first published in 2012. The publication resulted from a cooperation project between UNWTO and the Chinese city of Hangzhou with the aim of highlighting the potential for further development of the MICE industry in Asia and the Pacific.

This region is one of the fastest developing regions in the world, with some countries and cities already leading in MICE tourism. It has recognized the potential of this industry to bring economic, social and intellectual benefits, and we are seeing ever more exhibition grounds, accommodation units and entertainment facilities being constructed throughout the region, as many destinations transform themselves to diversify and gain competitive advantage within the MICE industry.

This industry is one of the key drivers of tourism destination development and therefore an important generator of income, employment and foreign investment. Beyond these economic benefits, the Meetings Industry also presents opportunities for knowledge sharing, networking and is an influential driver of intellectual development and regional cooperation. These drivers are identified and discussed throughout this report through the use of relevant case studies from around Asia and the Pacific, and is built upon a solid theoretical industry and economic background. This is emphasized by a comprehensive overview of each of the leading destinations within this region and their offering within the MICE industry, as well as best practice examples.

Relevant insights for all MICE destinations and practitioners can be found within this report, and the UNWTO trusts that it will help serve the understanding and future development of the market, both economically and intellectually.

## Global Meetings Initiative

Under a cooperative agreement between UNWTO and the International Congress and Convention Association (ICCA), Meetings Professionals International (MPI) and Reed Travel Exhibitions, the Global Meetings initiative intended to be the first phase of a harmonized approach to measure the economic contribution of the Meetings Industry and its tourism connection in such a way that could allow for international and intra-national comparability.

While the initiative was never fully launched, the following three Global Meetings Initiative documents were designed to collect statistical information and data on the core Meetings Industry, as well as on a limited set of meetings, and participants to meetings in corresponding pilot countries.

**Volume 1:** Proposes the adoption of strict definitions to provide support for the work of UNWTO consultants in the implementation of case studies in the projects pilot countries. It provides guidance and support for the compilation of statistical data at the country level by Meetings Industry associations that work in cooperation with Initiative management and case study consultants. This document is a revised version of a previous draft that was presented for discussion at the UNWTO Steering Committee held in April, 2008.

**Volume 2:** Aimed to guide the work of consultants who were conducting case studies in seven pilot countries covered under the Global Meetings Initiative, which included Australia, Austria, Canada, Finland, Mexico, South Africa and Spain. It provided “terms of reference” for the work that was to be carried out under supervision from the UNWTO Statistics and Tourism Satellite Account Programme.

**Volume 3:** Presents the pilot country data schedule in order to allow consultants along with the initiative management to gain an accurate picture of the quality, coverage and other aspects of the available statistical and other type of data. The data is organized into two sections, corresponding to a demand-side and a supply-side perspective, respectively. At the end of each section, model tables are included that summarize the information required.





# Global Report on the Meetings Industry

# Introduction: The Real Value of the Meetings Industry



MEETING PROFESSIONALS  
INTERNATIONAL

As defined by the UNWTO, Reed Travel Exhibitions, ICCA and MPI, a meeting is a general term indicating the coming together of a number of people in one place, to confer or carry out a particular activity. The term “meeting” and its description above was defined to refer to a gathering of 10 or more participants for a minimum of 4 hours in a contracted venue. These meetings include conventions, conferences, congresses, trade shows and exhibitions, incentive events, corporate/business meetings, and other meetings that meet the aforementioned criteria.

The activities of the Meetings Industry are an increasingly significant element in the future growth of the global economy, an essential part of the spread of knowledge and professional practices, and a key factor in building better understanding and relations amongst different regions and cultures.

There are several “positive points” in the Meetings Industry such as:

- Meetings are big business in their own right, and play an important role in supporting other businesses.
- Meetings promote investment, trade, communications, and technology.
- Meetings bring education and professional development to the local community, creating jobs and retaining work forces.
- It is a “clean” industry and promotes environmental quality.
- Meetings promote and support other business sectors.
- Meetings represent the “high end” of visitor spending.
- Meetings attract global expertise.
- Meetings create and spread knowledge world-wide.
- Meetings build community profile.
- Meetings promote global understanding and cooperation.

However, one of the main barriers hindering the development of the Meetings Industry is not being able to manage what isn't

measured! What's more, if you can't measure it, it doesn't exist. Yet, the fact that such measurement isn't easy to gauge is no reason to abandon efforts or discount the value meetings, conventions and exhibitions generate. That's the problem, even today, for a true measurement of the Meetings Industry we would have to measure items like:

- **Attendee Spending, includes all purchases, including taxes and tips, made by the attendee/exhibitor and their companions (e.g., spouse). It also includes any additional spending made in the market before or after the actual event due to extended stays.**
- **Exhibitor spending, including the local spending made by exhibitors as a result of their participation at the event.**
- **Event Production Cost, with costs incurred by the convention center for products and services relating to hosting events. It also includes expenses borne by event organizers for the provision of off-site entertainment**

The biggest gap of all is reserved for the most important factor – the value that meetings tourism generates in terms of professional development, knowledge transfer, investment generation, jobs creation and retention, talent acquisition, technical progress and all other areas that define why these events happen in the first place. Here, there has typically been an abandonment of any real effort to even try and, as a result, the most valuable benefit of all is simply ignored.

The UNWTO has been working for a long time in areas such as Youth Travel. We've talked before about the Young Travel Report, but there is a big shift to consider when we talk about all these generations in terms of Meetings Tourism because they have new needs, new expectations and of course are used to new educational formats. It's so important that you consider this when developing strategies within the Meetings Industry.

Government and community attitudes shape our working environment as an industry. They, together, control major decisions that determine our future, including such things as: Capital investment in meetings facilities, investment in meetings marketing and promotion, local infrastructure development (i.e. hotels), community support for hosting potentially disruptive events, transportation and travel policy (competitive access), national and international security measures and local and national taxation policies.

As our industry grows, so does its impacts and interactions with the rest of the community. We need awareness and understanding to get the kind of support needed for the industry to continue to grow and prosper.

In the UNWTO study , *Tourism Towards 2030*, one of the main data points is the emergence of new markets in our landscape. These new markets are not only receptive markets but likewise to become new clients within the Meetings Industry.

This market as in all industries is global, and therefore means effort and opportunity for all, not just for new prescribers within Meetings Tourism but also for those who have been working for many years in the market and need to adapt and create their new strategies.

The results are not immediate, this is an assertion that we must take into account.

Think what kind of benefits it brings such as: providing stimulus to global economic growth by creating forums for new product development, exchange and marketing; Facilitating academic, technical and professional advancement by encouraging the global development and exchange of research, knowledge, standards and procedures; Supporting communities by facilitating access to global knowledge and expertise and attracting new investment potential; Enhancing and supporting transportation, hospitality and tourism infrastructure by creating an economically important rationale for non-leisure travel; Promoting international cooperation and collaboration by encouraging and sustaining business and professional networks, and supporting economic transition by facilitating retraining and professional development on a global basis.

I hope that this report will serve your needs and act as a guide on trends and expectations towards the Meetings Industry.



*Jesús María Gómez*  
President MPI Spain Chapter

# Highlights to consider for a city that wants to develop a strategy through meetings



## I. Starting with four questions

**Are the strategies that destinations have been deploying in order to attract meetings during the last 20 years still valid?**

No, the model is broken and the approach is unsustainable.

**Why do destinations need a simple, powerful and focused strategy?**

Because destination marketing isn't about tourism, it's about economic development. Meetings today are not only a key revenue channel but a very efficient one (ROI). Recent studies have further shone a light on the impact of business travel; in the UK, meetings & conference delegates make up around 30% of total visitors to the Britain; in Mexico 780,000 jobs are classified in the meeting industry sector and 32 billion Canadian dollars are directly spent in Canada according to different reports.

**What has been happening?**

When considering the statistics shared it is easy to understand what smart destinations have been doing during the last 25 years. We have seen the rise of DMOs/CVBs (Destination Marketing Organizations / Convention Bureaus) and destination marketing strategies. The objective was clear: to attract the maximum number of meetings and delegates. Therefore an explosion of investment in core infrastructure (airports, roads, trains), meeting infrastructure (convention centers), meeting marketplaces (IMEX, EIBTM etc.) and sector associations growth (PCMA, ICCA, MPI, SITE etc.)

**What's the problem?**

The current destination marketing model for meetings is broken. The traditional approach may be efficient for the short term but ultimately the model is broken and smart destinations need to re-invent the game. After generic and worldwide growth, destinations today face a brutal reshape of the sector due to different reasons. We can recap those into five drivers: (1) hyper competition, (2) economic cycles, (3) culture, (4) technology and (5) new generations.

## II. Why the current model is broken: TOP challenges

- Current strategies are not client-centric. Corporation and Association event planners are requesting a completely different approach and destinations are too slow in responding to these customer changes. Why? Almost 90% of DMO/CVB worldwide cannot take quick decisions as they belong to regional or national tourism bodies and ministries. therefore the number of levels of bureaucracy can make decision making extremely complicated.
- Traditionally (of course there are great exceptions) DMOs / CVBs have not had enough human, technical and economic resources and when they do it can be not efficient enough or well deployed. The honest truth is that these institutions are completely under resourced considering the meetings and spend they support in bringing to a destination.
- The strategies, tactical plans and the way that destinations push for meetings have not been updated for the last 20 years (trade shows, advertising, representatives, agencies, bidding, etc.). Overall we have seen limited new technologies deployed or smart and social media campaigns.
- Normally, destinations target corporate and association meetings differently but do not use a multichannel strategy with adapted messages per industry sector or per channel. Probably we are suffering from Marketing myopia, (a term first coined by Theodore Levitt) suggesting “that businesses will do better in the end if they concentrate on meeting customers’ needs rather than on selling products.”
- It is an endogamy game. For the last decade the ‘same people’ have been ever-present in the same sector associations, speeches, magazines and panels, hence the rise of the copycats.
- When it comes to attracting meetings to a destination, the proposition is often not well articulated worldwide, the roles of the value chain are not clear. A myriad of CVBs, intermediaries (PCO, DMC, RP, marketing, TMC), partners/suppliers, chambers of commerce... makes this complex
- Economic cycles are affecting destinations. The ecosystem is suffering so governments are pushing desperately for results (event infrastructure such as convention centers and hotels developed during the

‘good times’, agencies) and in the economic downturn it made these strategies extremely important in order to fill them.

## III. Going tactical

On a macro scale some drivers are affecting the required destination strategies covered in chapter one. In terms of tactical plans the following top trends must be taking into account:

### ■ Corporate events

Procurement, compliance, event fragmentation (explosion in number of events but smaller size)

### ■ Association events

Long- term outsourcing models (Core and Preferred PCOs), decrease in association revenues (delegate fees and sponsors), content distribution (congress content as a revenue channel)

### ■ Both corporate and association events

Market consolidation (less and bigger players), rise of digital (hybrid and online events), Corporate Social Responsibility & Sustainability, Measurement and Meeting design.

## IV. Let’s talk about marketing

It’s clear then that destinations need a better marketing approach. What are the relevant concepts when it comes to prepare a better plan due to current trends and challenges? Branding, positioning, core competencies and the new consumer.

### Branding

Destinations must become a brand for business sources within the meetings world (e.g. Association Executive Officers and Board members, Corporation Marketing Directors). Today most of the destinations still play the ‘cost game’. The key challenge is not to become a commodity.

What is needed to develop a destination brand for meetings? Of course the traditional meeting related associations’ rankings (such as UJA, and ICCA) play a relevant role. Industry associations, the media and agencies have been issuing more and more reports, white papers and rankings to help destinations (cities and

countries) in branding. For example:

- **Bloomberg's Global Innovation Index (TOP 3 USA, Germany and South Korea)**
- **World Bank's Ease of Doing Business (TOP 3 Singapore, Hong Kong SAR (China) and New Zealand)**
- **Country brand Index by Futurebrand (TOP 3 Switzerland, Canada and Japan)**
- **World Economic Forum's ranking on country competitiveness (TOP 3 Switzerland, Singapore, Finland)**

Destinations must bring the 'economic' value argument to their conversations with clients and highlight what's in it for an association or a corporation (more delegates, easier sponsors, more economic security?)

### **Positioning**

Destinations should also define strategies for both positioning (creating an image or identity in the minds of their target market) and repositioning (changing the identity of the destination as a product, relative to the identity of competing cities/countries) always retaining front of mind the reshaping of opinion and constant evolution of the sector.

As a sample of great positioning exercise the Scandinavian members of ICCA embarked on an exercise to position Scandinavia as the world's first Sustainable Meetings Region where convention bureau, congress center and other meetings industry professionals in Finland, Sweden, Norway, Denmark and Iceland agree on a common set of indicators that they can use to benchmark and transparently communicate their progress in this area.

### **Core competencies**

There is a need of better articulation around destinations core assets: 'finding', understanding and promoting the core competencies. Today due to a lack of innovation the modus operandi 'mode' has been copying other destinations.

As a reminder the core competencies of a destination should be specific factors that a city/country sees as central to the way it works and fulfils three key criteria: It is not easy for competitors to imitate, it can be reused widely for many markets, and it must contribute to the end consumer's experienced benefits. We can see Singapore or Sao Paulo as an example. While Singapore promotes as a core competency that it

is a safe and modern destination, English-speaking, good infrastructures; Sao Paulo promotes there is a meeting every 5 minutes, SP population of 20M as a potential market (delegates) and has become the preferred city for international HQs in South America.

### **The new consumer**

Consumers (association and corporate buyers) are different from how they used to be:

- **Before: lowest price / Now: total value**
- **Before: seeking more stuff / Now: seeking meaningful experiences**
- **Before: passive recipient of brand communications / Now: active co-creators of content, products and experiences**

Reflect back and think about how many destinations are bringing these concepts to their sales propositions with concrete cases and outcomes.

## **V. So what? What destinations should have in mind when executing their meetings strategy**

- **More branding conversations less cost based discussions**

"Marketing is the art of brand building, if you are not a brand, you are a commodity.

Then price is everything, and the low-cost producer is the only winner." Philip Kotler, Strategic Marketing for Educational Institutions

- **Stop selling the hard facts and figures**

Normally cities use figures (hotel rooms, number of convention centers, number of restaurants, and airlines) which are important but aren't unique or as valuable as used to be. The ease of information accessibility for clients makes this information sometimes unnecessary. Instead, become a storyteller for your destination

- **Define precisely the role of each component of the value chain**

For many destinations the role of the DMO/CVB, Chamber of Commerce, agencies, convention centers and other are not clear enough or even overlap. The end result is that



clients are getting contacted from different stakeholders with, sometimes, different messages but with the same objective. A common brand value proposition is needed. For example some destinations in Colombia are driving projects with all members of the chain to align their proposition whilst having the most efficient approach to the market.

#### ■ **DMO/CVB number and resources**

The paradox is that DMOs/CVBs do have not enough resources (human, technical, economic) while there are too many DMOs/CVBs. We have seen the rise of these institutions during the last 20 years across the globe everywhere, too many in certain regions where every city wants to have one. Today this is a key issue as the stretching of resources does not provide a high level of efficiency. On the other side, considering events and the huge economic impact CVBs/DMOs support provide in bringing them to destinations, the resources they have are simply ridiculous. Sometimes it is due to the funding model while sometimes it is more due to the direct funding from the city/government/taxes. There is an urgent need to revisit the funding model of CVBs/DMOs because it is directly linked to the economic impact ultimately.

#### ■ **Destination 3.0 friendly**

According to the “Power of 10 report”, launched in 2012 by the IMEX Group, we read “A decade from now the most important roles will be: event designer, learning architect and digital strategist”. Clients, delegates, members, sponsors are pushing associations and corporations to come up with another ‘type’ of meetings, what we call events 3.0. These include meeting design: more interaction, new session formats, co-creation, new layouts, better

engagement, content driven and more networking. ... while this is happening (delegates ask for a change after 20 years of similar formats, new generations want more interaction, sponsors want more visibility) destinations are not positioning themselves as 3.0 friendly.

For example some venues are pioneering in Asia (with MCI Group support), using social media to engage their community and launching innovative services to meet client demand- most recently a mobile application for their conference space allowing buyers to use a pre-built app for their event.

#### ■ **Create the right legal/tax environment**

Some associations and corporations decide where to have their headquarters due to the legal/tax environment for their interests. Some events follow the same logic. That is why some destinations are creating associations HQ zones (like Dubai In a recent change to the laws governing foreign businesses operating there, the government has made it easier for associations to establish a business presence there. The new rules allow associations to be classified as non-profits and remove barriers to non-profit operations)

#### ■ **Delegate acquisition**

According to the McKinley report on associations, attracting enough delegates to their congresses is one of the TOP3 issues that that keep associations awake at night. Destinations must provide and/or facilitate this service (normally they outsource this if they want to get more chances in attracting a congress or B2C corporate events supporting organizers.

#### ■ **Embrace social media**

Although today, emerging media is a must use platform for destinations, many follow very basic strategies when it



comes to social media (I have X thousands followers, I send Y thousand tweets) but the key performance indicators (community interaction, scalability and amplification) are not well tracked. The top 3 channels for destinations are Facebook, Twitter and YouTube. We expect to see an increase in other platforms such as Tripadvisor, Google+ and Instagram. There are examples of destinations setting a good example as highlighted in the social media leaderboards of the European NTO Digital Benchmark where (as an example) in Facebook, Tourism Ireland, Turespaña and Visit Britain ranks TOP3).

## VI. The future: average is not enough. Status quo is out

- **Destinations will deploy their teams by industry sectors rather than by regions or the classical split association vs corporate events. However, clients need more preparation from the destination side. As Daniel H. Pink mentions in his book *Whole New Mind* “TODAY SALES DEPEND MORE ON THE CREATIVE, HEURISTIC, PROBLEM-FINDING SKILLS THAN ON THE REDUCTIVE, ALGORITHMIC PROBLEM SOLVING SKILLS OF THE TECHNICIANS”. We need knowledgeable destinations, staff understanding client sector blueprint, challenges, opportunities and trends.**

- **Destinations will become either storytellers or story-doers**

Storytellers think of story as the domain of the marketing division, however a story, thought of as separate from the destination strategy, is most often expressed through advertising. Storydoers, think of their story as a strategic asset and a competitive advantage advancing their narrative through action, not communication (companies such as Red Bull, Starbucks, American Express and IBM). According to

a recent study from co.collective, story-doers generate a substantially greater (20 times more) number of mentions in social media vs. traditional storytellers.

- **Destinations will buy events**

One of the key strategies to keep competition away is becoming the owner of the event. Some destinations are following two tactics: creating (e.g. together with key opinion leaders and/or agencies and/or venues) or simply buying existing events. In the near future we will see further destinations following this trend.

- **Destinations will promote disruptive innovation strategies**

Today destinations follow strategies mainly focused on the high-end market (big congresses, big conventions etc.) creating space at the bottom of the market for new disruptive competitors (in other industry sectors think about low cost airlines or Online Education)

Competitors (destinations) will bring to market innovations with lower gross margins, smaller target markets, and simpler products and services that may not appear as attractive as existing solutions when compared using traditional performance metrics.

## VII. A Final word

### The world is changing.

The meetings market is facing a paradigm shift, requiring the need to reshape, which brings with it both challenges and opportunities.

The rise of the middle class (China, US, India, Japan and Brazil becoming the TOP5 in middle class population



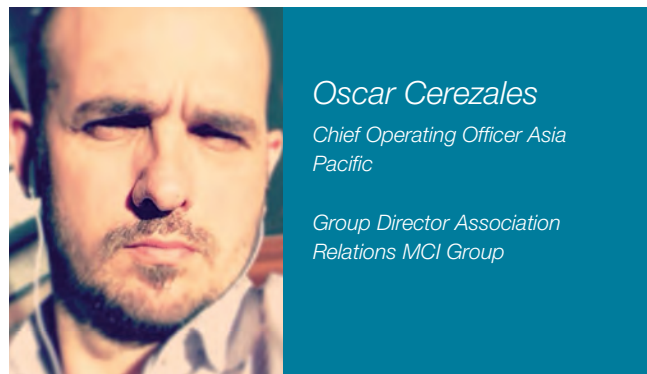
by 2025 according to different projections) means more consumption, so more marketing investment from the corporations selling products. This translates into an explosion in the number of events taking place, however, they are smaller and more targeted to suit the locality which often means they fly under the radar of destinations where the focus is “big is best”. A more fragmented market provides huge challenges for DMOs/CVBs who have a need for better investigative powers

New generations don’t want “standard” events; they are tired of the traditional model and want to co-create the content, to engage with more networking and more interactivity. They want to feel part of the event, not a mere spectator. New formats and concepts are growing and these are affect venues and organizers in a way they haven’t seen before.

Hybrid and online meetings are here to stay (inexpensive, larger audiences, linked with social media strategies, longer event life than traditional ones, easy tracking, friendly to new generations and providing a new revenue channel). More online events however means less attendees flying into a destination.

The economic power shift to the East (Global Trade Report: since 2000 global trade has doubled, Asia to World doubled but Asia to Asia tripled) and economic cycles are pushing companies and associations to expand and invest more in Asia and less in traditional western countries.

*The world is changing. The industry better be ready!*



**Oscar Cerezales**

*Chief Operating Officer Asia Pacific*

*Group Director Association Relations MCI Group*

# Understanding the True Value of Meetings



Whilst both national and international meetings can be used by destinations as part of their tourism seasonality strategy, this type of approach seriously underestimates and undervalues the importance of the meetings sector. In 2006 the UNWTO, in collaboration with ICCA, Meeting Professionals International, and Reed Travel Exhibitions, launched an agreed methodology for measuring the direct impact and value of meetings that complied with Tourism Satellite Accounting standards and which therefore could become a future global comparator between countries.

Since then, UNWTO-compliant national studies have been carried out in the USA, Canada, Mexico, Australia, Denmark and the United Kingdom, with many other countries currently engaged in setting up the framework and funding to follow suit. As well as identifying that the meetings sector is an enormous sector in its own right (with expenditure larger than the automotive sector in the USA, for example), all of the studies reported that approximately half the direct expenditure generated by organizers and delegates appears under non-tourism related headings (everything from audiovisual hire to entertainment, and from meeting Apps to exhibition stand contractors), so are not included in standard tourism statistics or visitor surveys. Data on all of these studies can be found at the website of the Joint Meetings Industry Council (JMIC - <http://www.themeetingsindustry.org/>), one of the key umbrella organizations representing the global meetings industry, of which both ICCA and MPI are members.

Much of the current thinking on the impact of international meetings is related to the beyond-tourism and beyond-direct-expenditure elements. The direct spend and high per-capita value of such meetings have been long established by city-level and individual event economic-impact studies, but increasingly the focus has shifted to examine the implications of a strong meetings performance for a destination's inward investment, economic and trade development, knowledge creation and dissemination, high-level education for local university students, business development opportunities for visiting and local delegates, and the delivery of a vast range of healthcare, scientific and environmental objectives. Meetings are both a sub-segment of tourism (related to a proportion of delegate expenditure) and an important part of other broader

economic sectors, especially in the increasingly critical knowledge-based economy. Some of the most successful meetings destinations such as Vienna, Barcelona, Vancouver and Singapore have understood this broader context for many years, and over the last decade they have been joined in this level of understanding by a large number of other cities in all regions of the world which have shifted their meetings approach from being a sub-set of tourism to being a key driver of their economic development strategy.

ICCA's area of specialization and world-leading expertise in the meetings industry is the international association meetings sector, which we have been tracking for all 50 years of the association's existence, and we are proud to have been regularly sharing our statistics on this sector with UNWTO (Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account: <http://statistics.unwto.org/en/publication/measuring-economic-importance-meetings-industry-developing-tourism-satellite-account>). In celebration of our 50th anniversary, ICCA has produced a publication entitled "A modern history of international association meetings" (<http://www.icca50.com>), which includes data from 1963 to 2012, tracking the exponential growth of this key sector, which has developed in line with the explosive growth in new scientific, technological and healthcare-related innovation and discoveries, and which in turn has been driving much of the massive expansion of meetings-related infrastructure and marketing efforts that we have seen around the world. This document outlines the history of international association meetings and the motivations behind why they take place and how decisions are made on where they are held, but also looks forward to the factors that will drive future growth.

ICCA - The International Congress and Convention Association - represents the leading destination marketing organizations, venues, meetings management companies, and other suppliers of services to the international meetings industry. We currently have almost 1,000 member companies and organizations based in 90 countries worldwide. ICCA is the only



international meetings association specialized in the international association meetings market, and has been tracking international association meetings for 50 years; ICCA is celebrating its 50th anniversary in 2013. ICCA has five regional offices in addition to its Head Office in Amsterdam; in Asia-Pacific, North- and Latin America, the Middle East and Africa. For more information about ICCA visit [www.iccaworld.com](http://www.iccaworld.com).



*Martin Sirk*  
CEO  
ICCA - International Congress  
and Conventions Association

# How Business Events Bring Added Value



## JOINT MEETINGS INDUSTRY COUNCIL

In today's highly competitive world a decision to engage in any part of the visitor economy necessarily involves a significant investment. In the case of the meetings and business events sector, this investment will likely extend well beyond program and promotional investment into the development of facilities that may be amongst the biggest infrastructure projects undertaken by a destination. For a government owner – which is the case with well over 75% of convention centres worldwide today – this investment must be weighed against other investments in their community, many of which may be much more popular with local residents.

So that decision must be based on very good estimates of what kind of return can be achieved from the required investment. While this is reasonably easy from the point of view of the economic impacts associated with incremental visitor spending by event organizers and delegates, there are many other returns that need to be taken into account in order to get a full picture. Here are some of the places to look for the added value associated with business events;

First, meetings and conventions grow the visitor base by attracting people who are primarily attending their event rather than having chosen that destination exclusively on the basis of its own merits - people who might otherwise not have come at all. Further, they often come at times of the year when other kinds of visitors won't, which helps support the development and maintenance of tourism infrastructure such as hotels and attractions that support other types of visits as well.

Secondly, delegates are typically bigger spenders than the visitor average, and often on corporate or professional expense allowances. This means they stay, on average, in more expensive accommodation and are able to indulge in more costly restaurants and transportation options. At the same time, it's not just about what they spend themselves but also what others are spending on their behalf - for every delegate there are a host of people organizing events, arranging meeting space and buying services to support their participation. There are also exhibitors who show up and spend even more money in order to pitch products and services at those same

delegates, and all this spending is directly attributable to those delegates being there in the first place.

However, as attractive as the financial returns are from the meetings business, these are often far outweighed by broader community and economic development benefits. Meetings and conventions essentially take place for the purposes of business, professional and scientific development as well as sharing knowledge and expertise -so it's not surprising that both the events themselves and the people who attend them have a lot to offer to the host community.

From an economic development perspective, meetings and conventions attract people who are much more likely to be business decision makers – and this can generate not only local business prospects but trade and investment potential as well. Events also inevitably act as showcases for local products and services, if only because these will get exposure during the course of the events and the related social, educational and entertainment activities that take place around them.

But there is an even broader benefit to the host community. Events in any area of discipline – particularly major national or international events – often attract literally the very best expertise in the world, which means local access to a high level of knowledge transfer and international exposure for local professionals. In areas like medical practice, this can have huge implications for how local skills develop – which creates, in turn, big benefits for the quality of service in the community. All these factors combine to create a strong and diverse return on an investment in the business events sector – and that is exactly what many governments are looking for today as they seek to build a more robust local economy in the face of lingering global financial challenges.



*Rod Cameron*

*Executive Director  
Joint Meetings Industry Council*



# Bogotá Convention Bureau: *Reinventing your destination in times of crisis*



According to the “Country and City Ranking 2012 “ published by the International Congress and Convention Association ( ICCA ), covering over 900 cities worldwide, Bogotá is listed among the top fifty with the largest number of events carried out. In Latin America in a short time it has climbed to sixth place, becoming one of the most attractive in the region, and in Colombia, it is the leading destination, contributing to 36 % of the events reported by the country.

This standing has been achieved by the development efforts the Bogotá Convention Bureau (BCB) since 2010, the date on which the entity redefined its role within the sector according to the destinations calling.

This is how the BCB, modified its mission - vision - firstly - holiday tourism, focusing their efforts on promoting meetings tourism. Likewise, it assumes the responsibility of becoming a space for public-private concentration, under the leadership of the Chamber of Commerce of Bogotá (CCB), which today forms part of its government.

This reassessment, to give Bogotá an office that would adjust to fit its needs and potentials, involved taking on new challenges on several fronts. The first was the strengthening of the business, for which in just three years went from 45 to 160 members. The second focused on institutionalizing an exercise in public- private dialogue through which local and regional administration became involved as strategic partners of the company, strengthening private initiatives and generating greater competitiveness for the destination in its promotion and recruitment of international events.

As a result of this pact, the bureau forms part of different scenarios that define city internationalization processes, such as the Committee on City Marketing and Tourism Cluster Meetings led by the CCB.

These efforts have generated significant sums for Bogotá and its scope of influence. Accounting for only the events managed by the BCB, in 2012 the city obtained an economic impact of \$25 million with 11,600 international attendees to events. These figures were already surpassed during the first quarter of 2013



and whose projection for the year is U.S.\$36 million with 27,000 attendees.

The results that we share today leave us with several lessons, the biggest of which is that a city is much more competitive when it presents a unified approach and criteria on the form of communication used to promote the destination, on behalf of both the public and private sector. Likewise, there should be absolute clarity about the actors and roles, ensuring conviction in the strategies.

It is important to understand that this process is composed of long-term initiatives and that this is essential to make wagers that commit actions and budgets in the same period of time.



*Alexandra Torres*  
*Executive Director, Bogotá*  
*Convention Bureau*



*Eduardo Pacheco*  
*Conventions and Incentive Travel*  
*Executive, Bogotá Convention*  
*Bureau*



*Linda Garzon*  
*Manager of Event Capturing,*  
*Bogotá Convention Bureau*

# Organic Growth in the Meetings Destination Industry *(Grow Outside Your Borders)*



According to Pulitzer Prize-winning New York Times columnist, Thomas Friedman, we have gone from a “connected to a hyper-connected world” — meaning that information is instantaneous and ubiquitous. As a result, competition for the kinds of services and products that associations offer is coming from all parts of the world, ranging from other societies to for-profit companies that are in many cases better resourced to provide the necessary services. In addition, the rise in use of various social-media channels makes it easy for communities to form that completely bypass the traditional non-profit society that used to be the central conduit to information flow.

The realities of the current global environment coupled with the disruptive nature of a digital age have compelled many associations to look beyond their borders for growth opportunities. While the digital age has increased competition, it has forced organizations to be innovative and stay on top of their game in order to be relevant. At the same time, it can be argued that it has created easier access to global markets. Relevance is of increasing importance to all societies as they face competition from for-profit companies that are increasingly taking advantage of lucrative opportunities to provide continuing education credits. That growing trend is making many associations re-think their business models and value propositions.

There are various types of association models when it comes to growing beyond your own borders but most have been based on geography instead of subject matter — that is to say they can be state, country, continent, or globally oriented. This is somewhat logical given that most associations are governed by laws in their specific regions and tend to lobby or affect change within their geographic boundaries. However, it seems counterintuitive for certain associations to be restricted by geography. For example, a medical society devoted to cardiovascular diseases is not restricted by artificial geographic boundaries. Thus, logically, it would make sense to have the most talented researchers and scientists involved in solving issues related to cardiovascular diseases and to bring the necessary resources required, including financial assistance, to bear on this medical specialty. This has nothing to do with geography. That being said, many associations still operate in the same fashion as when they were created many decades earlier. These types of associations will



be forced to change or eventually lose relevance, if that has not already happened.

Many societies were founded as global entities. They have always had members based around the world and held meetings on almost every continent. However, this paper is focused on organizations that were created with a domestic orientation and through organic growth combined with environmental changes are finding success on a global basis. The information in this chapter is based on research that was conducted among Professional Convention Management Association (PCMA) members that have evolved from North American-centric organizations to successful global associations. It provides an overview of various approaches taken by these organizations without attribution to any single organization.

## Why Go Global

Organizations have been looking for growth opportunities beyond their borders for decades. Beyond the business rationale for growth, among the reasons why they have gone global includes: ease of doing business; access to labour; return on investment; risk management; political stability; infrastructure; members demanding increased services; loss of relevance if not in key markets important to existing members; banking regulations and access.

Certainly the above list of reasons why associations expand beyond their existing border is not exhaustive. However, those associations that do make the leap tend to have greater access to intellectual capital and other resources that allows them to be better prepared to the ever-changing needs of their domestic members, while building new competencies. It's important to understand that associations that have been truly successful at going beyond their own borders have not necessarily seen immediate success. Instead, this process has been one of trial and error and carefully studying those that have been pioneers in global growth — which can take years. It's important to realize that this is not a short-term endeavour. The organization's leadership must be properly prepared for the process and expectations must be properly managed when they make the decision to go beyond their borders. These steps can reduce anxiety regarding short-term results and costly mistakes.

## Tailored Approaches

The first step in the process is realizing that one size does not fit all and most regions of the world require their own customized strategies. At the same time, it is important to recognize that taking your first step outside of your border does not require immediate changes to your governing structures and bylaws. In my research, most organizations tested various approaches —

what I call “small bets.” This can be anything from encouraging international membership to selling educational products and services outside of their geographic markets to collaborating with a foreign entity that is suitably aligned. That is to say, they tested various approaches and strategies and evaluated outcomes before they made major resource commitments or looked at changes to their organizational structures.

In North America, the chapter model has been quite successful for many associations, but this model requires significant infrastructure investment and a highly committed core of volunteers with skills that vary from governance to education and programming to give a chapter a chance at success. North American organizations that have tried to impose this structure in other parts of the world have realized marginal short-term success, but ultimately did not realize the level of success they achieved domestically. In other parts of the world, volunteering for an association is not necessarily a cultural norm and thus can severely impact the chapter model that requires volunteers to dedicate significant personal time to chapter development. Successful organizations have long realized this and have employed various hybrid approaches to growth.

## Customer/Membership Model

One of the hybrid approaches that I found quite common in my research is the “customer/membership” model. This model does not require everyone to become a member but is a combination of customers and members. The members have certain benefits that are exclusive to them and the customers buy products and services on an a la carte basis at a premium, without a purchase of year-round membership. This model can be very effective in certain areas of the world as it does not require significant capital investment and can allow an organization to make a rapid entry into the market. Entry is usually accomplished by staging face-to-face events in the region as well as virtual events. This usually results in the formation of virtual communities and can build a sense of loyalty between the association and these new customers.

## Co-location

Another approach to test a specific market has been to co-locate a meeting in a region with a similar meeting that is taking place simultaneously in the region or with a similar society from that region. This allows the foreign organization to gain exposure of its products, services, brand, and thought leadership to a wider audience without making any future commitments. This approach has many attractive elements, as you can share costs and other resources which can limit an organization's initial exposure. Of course, it also means that you also share in the revenues as well. Many organizations have taken this approach a step further by providing joint memberships in each other's

organizations and offering special discounts to each other's programs. Clearly, proper brand alignment is critical in this approach or it can result in negative longer-term consequences.

## Strategic Partnerships

Another approach has been the formation of strategic partnerships with other societies and for-profit companies. This gives an association the opportunity to showcase its products and services to audiences that may not be on its radar. It also provides a useful benefit to the strategic partner by allowing that organization to leverage the association's products and services. In this case, an association does not receive any financial reward but has been able to extend its brand while testing new markets at a nominal cost.

In all of the above approaches, the common element has been collaboration with other societies and for-profit companies but as critical is the partnership with companies that assist these organizations in their delivery channels and strategy development. The development of virtual communities and digital extensions requires not only financial investment but an emerging skill set and technological capability. Many associations that follow a traditional operational model do not readily have these resources internally and thus seek partners in strategy development and execution.

## Factors in Successful Execution

In conclusion, going beyond one's existing borders is risky and can be a very costly mistake if the right approach is not taken. It is critically important to realize that one size does not fit all. In order to be successful in an increasingly flat world, organizations that have achieved success have embraced a combination of all the various approaches. This requires a careful understanding of the business and professional development cultures in different parts of the world and that the approach that is most likely to be successful is taken.

Organizations also need to understand their own core competencies and where partnerships will help to strengthen their own products or services. It is equally as important to recognize that you do not need to enter all markets — the focus should be on markets that have the potential for future gains. Successful organizations have also tested many approaches simultaneously, analyzed the results, and focused their efforts on the ones that have resulted in better outcomes.

While successful organizations do not need to change their structures to test markets outside their borders, they realize that

in the long term, a global organizational structure with global leadership is vital to future growth. Successful organizations have also realized that being global or going beyond existing borders is no longer "nice to do"; rather, it is a necessity for survival. Members of organizations that are not global will soon find other sources for their professional development, rendering those organizations irrelevant.

In an age of instant communication and information overload, societies can and should be more relevant than ever — impartially assisting consumers in separating fact from fiction. However, societies need to be much less complacent, as their main source of competition is no longer other societies but for-profit companies that are much more efficient at providing the necessary products and services.

Successful organizations have not only been able to approach the market with a customized strategy based on different regions of the world, they have also realized that they must be nimble and proactive with regard to emerging trends. They are also able to deliver their products and services in multiple mediums including face-to-face, digital, print, and to increasingly engage customers in virtual communities and social-media channels. They are where their constituents are, and ready to meet their needs — across boundaries and platforms.

# Case Study: PCMA's Global Growth



The Professional Convention Management Association (PCMA) started approximately 60 years ago as a Membership organization exclusively for medical meeting planners in the United States of America (USA). Since that time, the organization has seen tremendous growth and now has 6,400 members and more than 50,000 customers in 39 countries.

PCMA realized early that in order to stay relevant and to attract the best thought leadership, it needed to look beyond this singular membership category. The organization slowly allowed other scientific societies to become members, followed by other professional and trade societies. Today, one of its fastest growing sectors of membership is senior corporate meeting executives, but PCMA has never forgotten its roots and is still home to the largest group of medical meeting executives in the world.

As PCMA looked beyond its borders, it took “small bets” and entered Canada in the early 1990s with two chapters, and later followed with its first Latin American chapter, based in Mexico. Today, PCMA has 17 chapters globally but PCMA's strategy is not about “one size fits all.” PCMA's growth strategy has never been about opening chapters instead PCMA has tailored its strategy based on the needs of the

different parts of the world and in that process PCMA first assisted its domestic members to meet internationally by providing them with the education, tools, and resources to do so. This resulted in significant growth in supplier and planner members from outside of North America.

PCMA's strategy is anything but static and is always evolving, but at its core the organization has aimed to be the leading provider of education. PCMA creates communities of like-minded professionals who share best practices and innovative ideas for planning and executing conferences and exhibitions around the globe.



*Sherrif Karamat*

*Chief Operating Officer*

*PCMA Professional Convention  
Management Association*



# Play to your strengths: *How to attract the meetings market to your destination*



The Meetings Industry has for some time been recognized as an important economic driver for many destinations. Vienna Convention Bureau's statistics for 2012<sup>1</sup>, for example, state that the city played host to nearly 3400 events, which brought in half a million participants and generated more than 1.5m overnights. Across the UK in 2011<sup>2</sup> meanwhile, there were an estimated 1.3m meetings, generating spending of just under £40bn.

Thus, it is hardly surprising that the industry has become hypercompetitive. In 2013, the International Congress and Convention Association (ICCA), probably the leading global membership body for meeting industry suppliers, now counts more than 1018 member companies and organisations from 92 countries<sup>3</sup>.

It is therefore no longer enough merely to provide the meeting planner with the accepted 'hygiene factor' standards of easy access and good in-destination infrastructure and support services in order for a destination to stand out amongst their competitors. Rather, destinations who wish to attract this lucrative market should aim to exploit their "specific sector expertise"<sup>4</sup>, meaning their links with local/regional/national scientific, business, academic or professional competences. The paragraphs below list some examples of how this can be achieved in practice.

ConferenceAmbassadorschemes, asrunbymanycityconvention bureaux, are no doubt some of the better known examples of this type of strategy. By motivating leading professionals, academics and medics to bid for their international congresses to be held in their home city, the convention bureau creates civic pride among the destination's opinion leaders, heightens awareness of the region's areas of excellence among global professional audiences and fills the destination's convention centre(s) and hotels, thereby achieving major economic benefit for its members and the destination's businesses. In Glasgow alone, the economic value of confirmed conferences to the city through the Glasgow Conference Ambassador Programme was reported to have been in excess of £50m in 2012-13, more than a third of all conference business to the city<sup>5</sup>.

Destination Marketing Organisations (DMOs) can also work hand in hand with inward investment agencies to identify important new business contacts and invite and initiate conferences that highlight the specialist skills of the country and are aimed at developing international trade. This has proven to be successful for Estonia,

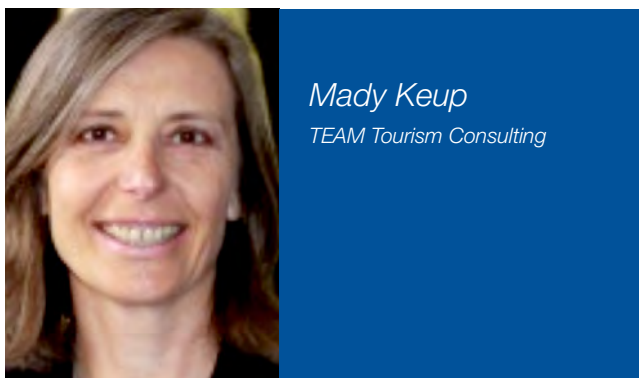
where the Estonian Convention Bureau, the agency responsible for attracting business tourism to Estonia, is a “non-profit organization established jointly by the public and private sectors. ECB is co-financed by Enterprise Estonia (EE) ”<sup>6</sup>.

The German Convention Bureau used a similar approach when working with national and regional trade bodies to identify and locate clear fields of expertise in Germany (industries such as biotechnology, transportation & mobility and micro-nano-opto sciences). GCB then mapped these areas of expertise against core industries of target markets (e.g. the USA) to identify potential overlaps of interest and hence reasons for holding meetings in Germany.

Cannes, on the other hand, is an example of a destination that knew how to take advantage of one event, albeit a highly publicised one, in order to develop other related industry spin-off meetings. The International Film Festival was created by the French government in 1946 to establish a cultural event in France to rival the Venice Film Festival. Since then, the destination played to its glamorous positioning and expertise in holding creative industry meetings and is now host to leading conferences and exhibitions on advertising, entertainment content, TV and music<sup>7</sup>.

Lastly, and inversely, it is interesting to note that business tourism

has a positive impact for a host destination that can go beyond mere economic benefit (money spent in the destination and creation of jobs) to bring about additional legacies. In 2011 Business Events Sydney released the second phase of its “Beyond Tourism Benefits: Measuring the social legacies of business events”<sup>8</sup> research, which quantitatively examines the extensive social, innovation and knowledge benefits of the meeting industry. The research reveals that it is important to measure the effect of business events in tourism terms but also to consider other outcomes from business events - educational, intellectual, trade and investment. These benefits in turn nurture local expertise, which then will bring about further meeting business to the destination – a virtuous circle.



Mady Keup is an associate for TEAM Tourism Consulting and has worked with TEAM on meeting industry related consultancy projects in Estonia, the UK, Saudi Arabia and Greece. She is also a lecturer and MSc course director at SKEMA Business School in France and was formerly the Head of the London Convention Bureau as well the Chair of the British Association of Conference Destinations.

<sup>1</sup> Vienna Meetings Industry Report (2012). Vienna Convention Bureau. Retrieved September 10, 2013 from <http://www.vienna.convention.at/Home/Presseinformationen/2013.aspx>

<sup>2</sup> Profile of the Meeting Industry in the UK, 2011, MPI Foundation. Retrieved August 21, 2013 from <http://www.mpiweb.org/UKEIS/Reports>

<sup>3</sup> <http://iccapworld.com>. Accessed September 10, 2013

<sup>4</sup> Presentation by Matthias Schultze, Managing Director, GCB German Convention Bureau at EIAT, Belgrade, 23rd September 2012. Retrieved September 10, 2013, from <http://fr.slideshare.net/milosjan/20120918-fs-presentation-eiat-conference-mathias-schultze>

<sup>5</sup> [http://newsroom.peoplemakeglasgow.com/media/131932/the\\_perfect\\_conference\\_destination.pdf](http://newsroom.peoplemakeglasgow.com/media/131932/the_perfect_conference_destination.pdf). Accessed September 10, 2013

<sup>6</sup> [http://www.eas.ee/index.php?option=com\\_content&view=article&Itemid=0&id=5136](http://www.eas.ee/index.php?option=com_content&view=article&Itemid=0&id=5136)

<sup>7</sup> Lions Advertising Festival, MIPCOM, MIPTV, MIDEM.

<sup>8</sup> <http://www.businesseventssydney.com.au/about-us/press-room/media-archives/2011/business-events-offer-more-to-our-destination-economies-and-global-community-than-tourism-dollars-alone.cfm>. Accessed September 10, 2013

# Balearic Islands Meetings Industry



## Govern de les Illes Balears

Conselleria de Turisme i Esports

The strong international responsibility in an economic scenario accentuated by globalization requires much more attention due to increasingly more demanding tourists who are much more independent in preparing their itinerary, and more interested in the pursuit of enriching experiences. In this scenario, it is essential to encourage the development of models to be more innovative, creative, competitive, modern, flexible and sustainable, which in turn makes investment in the tourism industry more attractive. That's the foundation on which the Govern de les Illes Balears has been working on for the past two years with two basic tools: the Comprehensive Plan of Tourism of the Balearic Islands 2012-2015 ( PITIB ) and the Tourism Act with which approaches the problem of seasonality, commitment to quality, innovation and research, taking advantage of the tenets of a differentiated tourism, making room for new forms of operations, in which creativity, quality and service excellence will make a difference against other destinations. This will win back for the Balearic Islands, its international recognition as a model tourist destination.

With 12.5 million tourists in 2012, the Balearic Islands are a leading tourist destination in Europe and the Mediterranean. While it is true that the volume of attendees from meetings tourism in the Balearic Islands has steadily increased over the past three years, today, it is still a segment with many more opportunities to develop and strengthen. Mallorca is well positioned in Europe in the segment of business tourism (especially in the UK, Germany and Scandinavia), but there is still room to improve the recognition and visibility of the destinations in the Balearic Island, specifically for the conferences, conventions and meetings sector. Highlighted as the strengths of the Balearic tourism experience are their know-how and organizational skills and an optimal year-round climate. The major obstacle to growth of tourism in this region can perhaps be conditioned by aerial capabilities. Isolation is a weak point vis-à-vis mainland destinations, in addition to problems associated with the progressive reduction of air connections to and from the Balearic Islands.

The drive from the various tourism promotion agencies at different levels to encourage meetings tourism in the Balearics is demonstrated by a number of initiatives such as:

- **The establishment of the Bureau Strategic MICE in 2012, by the Govern de les Illes Balears through Tourism**



Agency. Consisting of periodic meetings with the most influential representatives of the sector, with the aim of having a dynamic and flexible body of management which will define an operational plan developed within the PITIB, promoting public-private collaboration. Two Strategic MICE tables were held in July and October of 2012.

- The Island Councils of Menorca, Ibiza and Mallorca, and the Convention Bureau of Mallorca and Ibiza, working in collaboration with the ATB on the campaign for the international promotion of our islands as a meetings destination. On the islands of Ibiza and Menorca the tourism industry is very focused on the importance of meetings tourism at which hotels try to open during more months to accommodate visitors of this activity. The main challenge is to “make a name for itself” as a destination for meetings which now have a new infrastructure, suitable for holding events.
- The city of Palma is heavily promoting itself as a tourist destination city 365 days a year as a cultural city, encompassing sports, shopping and businesses. Whereby, the tourist will associate the brand with excellence in areas such as its vast character, culture, cosmopolitanism, etc. They are also searching for the most appropriate solution for the Palacio de Congresos Palma, a very expensive structure which could be made available, and would allow for Mallorca to open itself to the large meetings market (over 2000 people), currently inaccessible due to a lack of sufficient space in existing infrastructures. The city of Palma de Mallorca is in fact the third largest city in Spain, preferred by companies in Germany, Austria and Switzerland to host their meetings, incentives and events.

Regarding the profile of tourists visiting the Balearic meeting grounds, the majority are German, but the increase in recent years in the British and Scandinavian markets has been notable. However, also important, although to a lesser extent, are domestic and local visitors. Worth highlighting is the presence of visitors from emerging Russian meetings tourism in Mallorca, especially in incentives and events organized by luxury goods companies.

The island that hosts the largest number of events is Mallorca (1,195; with 68,064 attendees in 2011), followed by Ibiza and Menorca. The busiest months are usually May, June, September and October. Habitually they travel alone or with colleagues. They use the Internet and travel agencies to plan the event, which tends to be determined from past conferences experience, making it a tourist product that has a high level of loyalty.

Incentive travel, meetings, conferences and business reunions are often the main types of events held in the Balearic Islands. The average stay is usually 3 nights with a daily average spending between 200 and 250 euros. They regularly stay in 4 and 5 star hotels, with 4-star accommodations being the most popular, and with the deciding factor being the hotel's proximity to the conference or meeting. The most common sectors for such meetings are the technology, automotive, financial-economic and health sectors.

The main competitors to the Balearic Islands in the meetings sector are: Malta, Portugal, Cyprus and more recently Turkey and Egypt (Sharm-el-Sheikh), which compete both in prices and infrastructure.

## ANNEX 1. SWOT ANALYSIS OF MICE TOURISM IN BALEARICS

(Source : Agencia de Turismo de las Islas Baleares)

### Weaknesses

- Extraordinary reliance on air transport.
- Reputation of being a mass tourism destination.
- Scarce knowledge of the islands as a MICE destination, especially domestic market (only consideration of Palma).
- Underutilized mass marketing tools to promote as MICE destination - Resulting from the lack of budget.
- Difficulty using / providing emblematic public spaces for holding events.
- Little interest from institutions in supporting major events (congresses).
- Scattered / duplicate messages.
- Absence of a "single window" for tourism issues.
- Lack of structured complementary supply during low and middle season.
- Lack of promotional material for the Balearic Islands as a MICE destination.
- Delayed opening of the Palacio de Congresos, under construction since 2008. It should have a completion schedule.

### Strengths

- Excellent potential to develop incentives market.
- High level of audiovisual services, catering, and logistics.
- Airport capacity.
- Port capacity.
- Suitable climate throughout the year.
- Strong hotel presence specializing in four- and five-star rooms and options for social programs and with great professionalism.
- Established professionals in the industry.

### Threats

- Rise in air and port taxes.
- VAT increase.
- Destination currently undergoing maturity - Repositioning in mass media marketing.
- Hotel closures in mid-low season
- Poor image of the country overall. Must be countered by information that inspires confidence.
- Unfair competition. Absence of law to clarify.
- Reduction of assistance to MICE fairs by the institutions.
- Bureaucratic obstacles AENA - PMI: agencies without counters are banned from collecting clients. (counters come with high costs).
- Customers demand door to door transfers.
- Decrease of air traffic in the low season months with major destinations. Low connectivity and increased ticket prices.

### Opportunities

- Lowered fixed social security contributions
- Athletic activities that promote the destination: Iron Man, TUI Marathon Cup , etc. ...
- Future Congress hall.
- New markets (Russia, Eastern markets, China) .
- French market.
- Destination: Green Eco-tourism Meetings.
- Increase of air connections from European airports.
- Increased cruise arrivals.
- Markets with currencies outside the Euro.
- Attractive public facilities.
- Mallorca as the ideal destination to complement MICE activities.



## ANNEX 2 . FACILITIES AND SERVICES IN THE BALEARIC ISLANDS

### MICE RESOURCES

#### Facilities

##### a) Congress and convention centres:

- Auditorium of Palma de Mallorca
- Palacio de Congresos Pueblo Español
- Auditorium of Alcúdia
- Auditorium of Sa Màniga (Cala Millor)
- Convention centre, congress hall y exhibition hall Melià Victoria
- Mahón fairgrounds
- Multifunctional hall Es Mercadal
- Palacio de Congresos de Ibiza (Santa Eulària des Riu)
- Mallorca Convention Bureau affiliates
- Ibiza Convention Bureau affiliates
- MICE centres recommended by the Foundation Destí Menorca .

##### b) Other offices:

- Cultural centre Caixa Foundation
- Sa Nostra Cultural Centre
- Can Domenge Technology Centre
- ParcBit Business centre
- Ibiza Fairgrounds
- Business Centre PIME (Menorca)
- Mahon Home Theatre
- Mahones Choir
- Facilities under construction (Palacio de Congresos)
- Specialized MICE Hotels with the seal of expertise in the area of quality on behalf of the Tourism Agency of the Balearic Islands.

#### Sources:

Tourism Agency of the Balearic Islands , Ministry of Tourism and Sports of Government of the Balearic Islands.

Consell Insular d' Eivissa

Consell Insular de Mallorca

Foundation Destí Menorca Consell Insular de Menorca .

Ibiza Conventions Bureau

Mallorca Conventions Bureau

Congress of Santa Eulalia des Riu ( Ibiza )

Chamber of Commerce of Mallorca

Hosteltur



*Mr. José Marcial  
Rodríguez Díaz*

*Managing Director*

# Cartagena de Indias Convention & Visitors Bureau



Cartagena de Indias is expanding its scope, new hotel chains are opening, the Rafael Nuñez International Airport recently inaugurated its new modern expansion which has targeted airlines to open new routes and at higher frequencies to and from Cartagena, professional congress organizers strengthen their services, spurring innovations in new tourism products, boutique hotels are first class, as are the restaurants, which offer excellent cuisine.

The Cartagena Convention & Visitors Bureau is a private non-profit with 16 years of experience, working towards positioning Cartagena de Indias as a preferred destination for congresses, conventions, trade shows, incentive trips and weddings. During the first semester, Cartagena de Indias has had a high increase in the number of events, in 2012 there were 119, this year the number is 208. Just during this period the city received 70,923 participants who generated 212,769 hotel nights. To promote the destination, the Cartagena Convention Bureau participates in trade fairs of the MICE sector, promoting the destination and their partners. This year they have attended Expoeventos 2013, in Buenos Aires, Argentina. They have also been present at the IMEX Frankfurt MICE Zone 2013 and the ANATO Fair of the Colombian Association of Travel and Tourism in Bogota in order to increase the number of events taking place in the city.

“Cartagena de Indias has a 30-year trajectory in the meetings industry, it’s nationally and internationally recognized for its complete infrastructure. To stand out, we do not rely solely on our history and culture, our biggest challenge is to consolidate Cartagena, known as La Heroica, so that those who visit the city come not only once, but come back to relive their experience as if it were the first,” says Francisco Vergara, Executive Director of Cartagena de Indias Convention & Visitors Bureau. In the last three years, Colombia has improved its position in the ICCA rankings, (the International Congress and Convention Association, the association in charge of the most important corporate tourism measurements worldwide) to number 29 in the world and in 6th in Latin America. Cities such as Cartagena, Bogotá, Medellín and Cali, are actively working in the meetings tourism sector, successfully attracting big and important events.

Taking advantage of this strong momentum the country is enjoying right now, the Cartagena Convention & Visitors Bureau, conceived in 2012, an annual event focused exclusively on meetings tourism, in order to serve as a meeting point for Colombian companies to exchange and generate knowledge and business opportunities.

Meetings Cartagena de Indias was organized in just three months and thanks to its implementation, it has strengthened the knowledge of companies and institutions dedicated to meetings tourism. During the event, there were seminars conducted for event organizers and national associations, to provide them with training on how to capture events. Meetings Cartagena de Indias also offers a trade show for Hosted Buyers and local businesses as a forum for them to hold business meetings.

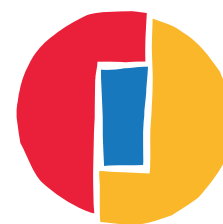
This year, the event's performance figures will be surpassed with the attendance of over 70 buyers, 51 booths at the trade show and the expectation of achieving over 1000 business meetings. Presentations are by meetings tourism authorities from the world over: Arnoldo Nardone, President of ICCA International , Juan Jose Garcia, senior vice president of ICCA , André Vietor, Chairman of the IAPCO Training Academy and Mircho Savov, Director of Ibera Travel Operations Centre.



*Francisco Vergara*

*Executive Director  
Cartagena de Indias Convention  
& Visitors Bureau*

# Fairs, drivers of development and dynamization



**IFEMA**  
**Feria de Madrid**

IFEMA, with more than three decades dedicated to the organization and management of fairs and congresses, is without a doubt one of the best observatories for the analysis of the evolution of the industries and their environment, as well as of the processes of adaptation to the different realities of the time.

One of the key referents of this analysis is FITUR, one of the main tourism fairs in the world and the emblem of what is today Spain's number one industry, which has seen its participant numbers rise, concentrating over 122 thousand tourism agents and professionals from around the world, and that, in five days, has capitalized thousands of businesses, exchanges, projects and accesses to new markets.

This event, as every other fair related to its economic sector, proves the need for its convening as one of the most effective, real and productive market mechanisms. In times like today's, in which everything that is rooted is questioned, affected by new trends and technologies, fairs keep proving, as FITUR has shown, how there is no qualified professional that will miss an opportunity that allows for personal encounters, exchange of ideas, perspectives and in-person agreements; the direct knowledge of business opportunities, the focalization of events for others that would not be accessed otherwise, where everything is harmonized for preparing and put together the sector's agenda in a face-to-face environment and a space in which time is the main factor of performance. A unique opportunity for transferring to the real world the digital management that the market now occupies, allowing the "disvirtualization" of the activity and the socialization and encounter of all those vital agents of the sector at a global scale.

The case of FITUR is, without doubts, an opportunity for effectively accessing the tourism business worldwide, not forgetting its potential as a driver for boosting the image of country brands, potentiating the touristic activity and strengthening the competitiveness. All that, as an essential part of its capacity as a catalyzer for the sector, and thermometer



of the changes in business management, consumption habits, and the new business models.

Without a doubt, the rich perspective offered by a fair, such as FITUR, allows to evolve the call, from an exercise of responsibility, towards those contents that contribute to the sector useful tools that help securing its competitiveness, aligned with its real needs, challenges and opportunities.

This reality of the ferial activity is reflected in IFEMA's activity in 2014, year in which it will celebrate 75 international fairs and congresses, and over 500 business events, that will congregate in Madrid over 32,000 businesses from very diverse economic sectors and 2,8 million visitors. A movement that will contribute an economic impact in the region of 2,000 million euros, as a consequence of the business tourism it generates, an active of IFEMA that during the past period was instrumental in situating Madrid en in the fourth position worldwide in the ranking of congressional cities, according to the last ICCA barometer. A growing activity also in the ambit of congresses that will be strengthened in 2014 by the celebration of eight major international congresses, that will mobilize the attendance of over 50.000 professionals from all the world and will generate in Madrid an occupancy superior to the 150.000 hotel rooms, as well as important income for the city.

All of that will situate the fairs and congresses as one of the most important and effective drivers for business development and for the dynamization of the economic and business sectors represented, as well as for the host destinations, countries and cities, projecting their image to the world.



# Management Technology 3.0 on Venues for Meetings



We now stand at the edge of the age of Web 3.0 where everything we do, every step we take and every decision that we make could potentially be captured online in a web of big data. This data can then be utilized for analysis and then reused to drive our next purchasing decision. This enables the market place to be truly interactive as the marketplace shares their respective product experiences and co-creates content together.

How does Technology affect the meetings industry? After all, the meetings industry is an industry that depends entirely on face-to face-events and not an industry that could model itself on the online purchases that is made possible by technology. Technology has made its way into the meetings industry over the years. Coincidentally, the industry had also subconsciously taken the 1.0, 2.0 and now 3.0 route of the web evolution. We have been slow in adopting the technology advancements and adapting these technologies into our industry. That is because technology, especially online technology, was initially viewed as an advancement that may make the need to meet face to face obsolete. This initial suspicion was unfounded and over the last 5-7 years, we have seen the gradual adaption of technology advancements in the meetings and venues.

Venues were amongst the first in the industry to try and adopt technology into their day to day life. The best example of this existed in typical 1.0 method such as static digital screens. As traditional CRT TV Monitors became flat panel screens, this enabled screens to be utilized as information screens. Like Web 1.0 innovations of yesteryear, the initial use of digital screens were essentially one-way streets. They existed to serve the purpose of driving directional information from the meeting venue to the delegate. At best, these digital screens were offered or sold to the meeting planner to drive meeting information to the delegates. The same 1.0 one-way street approach was also used in the sudden proliferation of meeting websites that drove information of their products to the market place.

The industry was quick to evolve into 2.0 type of technology. Taking the same example of the poor 1.0 digital screen, the same screen evolved from a plain directional piece into a screen where people could draw information that they need (on demand). Touch screen technology made such

implementation almost inevitable. Digital screens were designed with on demand content such as news feeds and ticker boxes that the delegate could call upon if they need the information. Websites also began to include feedback options that allowed for two way communications.

The advent of the mobile age has opened up a whole host of opportunities for the meetings industry that are truly exciting, bringing us into a 3.0 stage where meeting technology is no longer single directional but now multi-directional. New 3.0 applications allow for delegates to co-create content. It allows for planners to crowd source the new themes and topics of interest that the broad based membership would like to address or learn from.

In the future, the basic concept of uniform and constant connectivity in a destination will be the expectation. It's no longer about the Wi-Fi in a meeting venue or in a hotel. It's all about the ability to be constantly and consistently connected in a destination of the future. Once the delegate of the future lands in an airport, he will expect to be able to connect to a uniform network or a uniform series of networks that enables him to remain connected to his everyday life through his emails, professional and social networks, regardless of where he is and in a manner and expectation that's as seamless as possible.

Management technology on Venues for meetings will no longer be a one-way street. It's about interaction, it's about constant engagement, and it's about inclusion. Venues have always served as conduits where people congregate for a reason. Traditionally, that interaction existed in the form of meeting spaces like an exhibition hall, or a meeting room.

While the basic need to be gathered in one location for face-to-face meetings will not go away, delegates now not only interact in physical domains like meeting rooms, they will also interact virtually with their peers within their respective social and professional networks. These interactions do not happen only within the plenary or technical sessions. These interactions happen all the time, constantly, as delegates co-create content amongst their peer to peer networks. Uniform connectivity, as discussed above, then becomes the basis on which all these online activities could be built upon.

The development and gradual use of new technologies hold a lot of opportunities for the meetings industry. Personally, the most exciting technological advancement is in augmented reality and mobile data layering.

Augmented reality and data layering hold immense potential for the industry. Through the use of these two technologies, we will be able to bring presentations and site visits to life. Instead of a typical 2D physical floor plan, one could now

flip a mobile device and overlay layers of setups, activities and previous event examples onto a live screen showing the existing room or hall within the meeting venue. This could further be expanded into a city wide approach where site visits and fam trips can be brought to life through the use of these 2 technologies. The online concept video of the Milan 2015 Expo drew on this concept of how augmented reality and data layering could be used to enhance the experience of the average visitor once they arrive at the airport, check in to the World Expo Grounds, visit the country pavilions and other attractions in Milan. The video captures the essence of the huge potential of augmented reality and data layering for our industry and how this could be further enhanced for sponsor demos as well as tradeshow floor exhibits in due course.

Google glass (while still in its development stage) is another example of how these two technologies will potentially impact our lives in the near future. Information that we require gets processed in the cloud, and gets beamed to the small mobile screen of the Google glass in the form of data layers right in front of our eyes on demand. Such implementation of on demand data while we are on the move will increasingly be the norm rather than the exception. It may not necessarily be in the form of a pair of glasses, but the concept of a singular device that enables us to draw information and send out our thoughts on demand while not being constrained in one singular geographic location holds. Looking back, it's not so long ago that we were wowed by the futuristic technology in shows such as *Minority Report* and *Mission Impossible*. Yet, standing at where we are now, we realize that such a tomorrow is not that far away.

Big corporations and meetings have now developed their own apps to better serve their respective stakeholders. Through the App, they are able to constantly engage their existing sponsors, as well as create and maintain a peer to peer community for the rest of the year. Yesteryear Apps have been event centric. They exist for the reason of driving way-finding and session based information to the delegate and stakeholders during the days of the meeting. Then they typically cease to exist until the next meeting. Meeting Apps of today and tomorrow will need to be broader based in their approach and concept. Apps, like any meeting related software, can no longer be developed and conceptualized in silo as our world gets more integrated by the day.

We all belong to our own professional networks and communities. We all have the need to constantly learn from the experiences of each other outside of the days that we meet during our annual meeting. Apps have the potential to serve as the conduit for the sustainability of such a network. Apps, developed uniformly across different mobile platforms, gives meeting delegates the chance to stay connected while we are in our everyday professional life.

For the concept of a peer to peer community App to work, an App must be conceptualized and designed with multiple plug-in capability where news feeds, interest group pages, professional group links could be added and linked together into one huge professional community of our choice, designed, chosen and built by each respective user. Imagine the event app as the main Lego block where we go for our content. Then imagine the rest of the groups and communities that we are part of in our everyday life as separate pieces of Lego blocks that we could tag on. The difference is that the choice of piecing 4 or 5 Lego blocks together will be the choice of the user. We live in a content rich environment. The key is to be plugged into the right content sources and with the right peer to peer network. This opens up opportunities of collaboration efforts between the meeting planner and the meeting venue in specific meeting app development. This is especially true if the meeting is a recurring annual meeting and returns to the same venue over a number of years. Due to the number of meetings being held annually in a typical meeting venue, venues sometimes enjoy economies of scale in terms of app development costs. This will benefit smaller meeting groups who may not have the resources of huge meetings or corporations to develop their own event app.

Having an event app enables previously static content to be entirely transferred into dynamic content. This creates cost savings as well as opens up new revenue opportunities for the meeting planner to leverage upon.

Google recently concluded their Google Developers Conference in the Moscone Center, San Francisco. During the meeting, the 4,000 delegates were photographed, filmed and their every move recorded. This data is then stored, analyzed and processed by Google. The concept is to collect and process data of each and every delegate, such that Google would be able to be predictive and intuitive to Mr John Doe's known preferences in due course. This is almost an extension of traditional CRM practices. The concept of CRM being applied further downstream in delegate recognition enables the delegate's preferences to be detected or preloaded into systems that drive value and relevant content to the delegate.

Expand this delegate recognition one further step and we open up creative way finding opportunities where delegates could technically find each other if they chose to be found and seen by their own peers in a meeting. Such levels of delegate recognition opens up possibilities such as online message boarding, peer to peer appointment scheduling, private pigeon holing amongst many other possibilities.

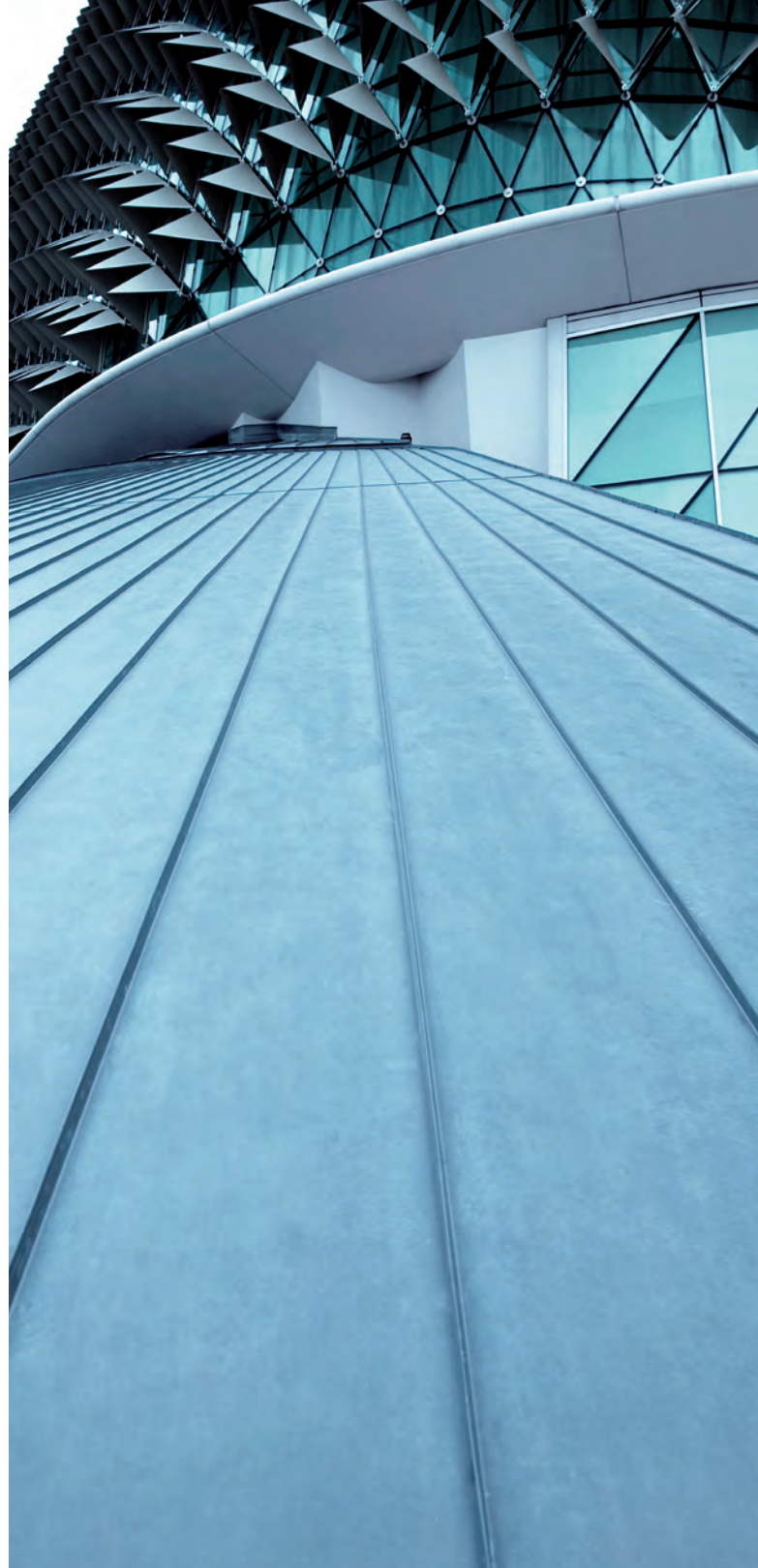
Due to the large number of meetings that meeting venues host in their annual meeting calendars, this opens up opportunities in big data management. Due to the wide spectrum of meetings that are held in a typical meeting venue, the venues may find themselves with information on delegate preferences across diverse demographics and across multiple industry verticals. This opens up the opportunity for venues to drive





trend studies across totally unrelated fields that may assist planners to uncover new trend lines and new meeting topics or themes. In traditional CRM, we strive to know more of our clients so that we could cater to their preferences in a more efficient way. Big Data management across different meetings will enable our industry to benefit on a macro level if venues and meeting planners will be willing and able to collect, collate, and process such information in the very same way Google did for their conference.

Generally, technology makes the world a better place to live in. It makes life simpler and makes our everyday tasks easier. Technology has to be first and foremost people centric. We belong to a face to face industry and technology serve as the multiplier and enhancer, not as a substitute. Technology needs to be harnessed in such a way that's people-centric; one that revolves around managing and enhancing the experience of the end user (the delegate). This points to a further evolution from the 3.0 concept applications that we discussed here. The technology of the future will be more intuitive and predictive to the preferences of the consumer as we inevitably know more about each other's preferences.



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# Case Study: Singapore



According to the Union of International Associations (UIA) 2012 global rankings, Singapore has retained its position as the top International meeting City for the 6th consecutive year. Singapore is a very small country, measuring only about 710 square kilometers or about 280 square miles in total area. Yet, this small island houses about 5million people in one of the densest cities in the world.

Singapore's ability to be consistently at the top of the international rankings hail from its excellent infrastructure as well as coordinated planning and approach to the meetings industry. This study attempts to give a very brief overview on the technology initiatives in the key meeting venues in Singapore and this has helped Singapore stay ahead of the curve.

## Max Atria @ Singapore Expo

The largest of the 3 major meeting venues in terms of gross floor area, Singapore Expo's new Max Atria was designed with a comprehensive wireless system that enables delegates to be seamlessly connected to the internet. This system was developed in partnership with technology firm Xirrus and is one of the main unique selling propositions of Singapore Expo. The provision of free wireless service in Max Atria is administered through the implementation of an event centric password that

is provided to every single user. Compared to the typical free to log on method of sign on, this prevents system overloads and ensures that the end user's experience is not compromised.

Singapore Expo's MAX Atria was designed with a comprehensive and scalable wireless system that enables delegates to be seamlessly connected to the internet. This system was developed in partnership with technology firm Xirrus and is one of the main unique selling propositions of MAX Atria. The provision of the wireless service is tiered -

from the free base tier service to the premium service, where customers can specify the number of desired devices to be connected (“Density”) and the kind of applications they want to run (“Bandwidth”). The provision of the wireless service is administered through the implementation of different event centric passwords that are provided to delegates. Managing the access in this manner ensures that the wireless receivers do not become saturated and compromise the users’ experience.

A major client had a 5-day industry workshop that was attended by 900 delegates each day. The conference required a flexible and robust Wi-Fi solution spanning the 32 rooms in MAX Atria, with specific access and bandwidth for speakers, delegates and organisers. A multi-SSID access, underpinned by different bandwidths for each usergroup, and further calibrated signal strength and coverage to suit the people density in each room was implemented. This resulted in an always-on user experience over the duration of the conference. With the wireless service, the MAX Atria can therefore handle anything from 50 to 5000 delegates, and if required, can be scaled into the exhibition halls for a many-fold increase in visitor numbers.

## **Suntec Singapore Convention & Exhibition Centre**

Suntec Singapore recently underwent a S\$180million project that saw the 18-year-old venue undergo a major refurbishment. Key to its refurbishment project is the installation of a new system that allows for up to 6,000 devices to be logged into the internet at the same time. The provision of this next generation broadband system rides off Singapore’s next generation broadband network which is being progressively rolled out in various part of the island state. Suntec Singapore had also redesigned their front entrance to incorporate a mega electronic screen that serves as the welcome card for their events and delegates as well as open new opportunities in the branding of meetings, sponsors and exhibitors.

## **Sands Expo and Convention Centre**

Marina Bay Sand’s Sands Expo and Convention Centre has the largest number of meeting rooms in Singapore. Their 250 meeting rooms can be combined into ballrooms through flexible walling systems or could also exist as standalone meeting rooms to cater to the diverse needs of the meeting planners. The meeting venue is wireless enabled and has been the home of the world’s largest telecommunications event for the last few years. The technology initiative that Sands Expo and Convention Centre had been rolling out this year had been their Mobile Meetings App: The Marina Bay Sands Meetings Concierge. The technology initiative was driven by the needs of its many clients. It is common for venues to have an App but the concept of a venue-based meetings app should be driven towards the needs of its customers, bearing the content of its customers and serving the business purpose of its customers. The Marina Bay Sands Meetings Concierge is highly customizable for all meetings, allowing for peer to peer community building as well as dynamic content delivery. Backend analytics enables the meeting planners to have valuable data and information for post-event evaluation. The Marina Bay Sands Meetings Concierge will be administered by the meetings team in Sands Expo as part of the service value proposition to the clients.

The App was used by the Singapore Association of Conference and Exhibition Organisers and Suppliers (SACEOS) during their annual meeting in July 2013. The conference was totally paperless for the first time in their history and drove delegates towards the App for dynamic content and information. This enabled SACEOS to drive dynamic messaging and also allowed delegates to form peer to peer communities that would meet out of normal breakout sessions to discuss common topics of interests pertaining to the industry that we represent. SACEOS also used backend analytics in the App for surveys and information gathering of their delegates. New potential topics were also crowd-sourced from the delegates for the purpose of new content for next year’s annual meeting.

# Strategic partnerships (*Formal Networking*) Between Destinations



Just as predicted, there is clearly a new scenario regarding the strategies that different destinations have to make use of. There is a need to catch more visitors, professionals and businessmen, since we are part of the networking and competitiveness era; networks born due to the fast changes at an international level, specifically attributable to factors such as globalization.

In the Meetings Industry, the fast transformation of the markets has been the result of a great demand by the consumers: to obtain products and services of higher quality, and within lesser timeframes.

This has undoubtedly influenced the destinations, now worried about refreshing their offer with more technology and innovation, but looking for efficiency and efficacy in the resources. It is this way that many important divisions of this industry have achieved true power through **“cooperation”**, since each entity or company by itself would find it almost impossible to answer to this market needs. This way we have slowly entered the world of **“strategic partnerships”**, and generally speaking these big endeavours have become more common during this last decade.

Certainly, many destinations -especially when it comes to visibility- have been aware of this issue. The process of opening that started taking place a few years ago has influenced our economies in a direct way: on the one side, by attracting investors which have found in the meetings market excellent opportunities; and on the other side, it has assessed the competitiveness of the companies and organizations at the destinations, starting a race to become efficient and internationally qualified.

This question has awakened in different sectors, among which we can mention businessmen, governments, unions, and promotion entities: the interest in group work. It is in the cooperation with other entities that they foresee the key to face these problems and become stronger.

It is here where cooperation makes use of strategic partnership as a management technique, and for the implementation of the goal. And it is why in this document I attempt a close-up



to the term partnership, to illustrate its feasibility in our industry –particularly in the destinations- through the revision of some experiences, and prove why we should take advantage of this tool to attain better levels of competitiveness.

Now, is it clear what **“Strategic Partnerships”** means? A very witty friend would say they are two words. And it is true, they are two words. What do they mean?

**Partnership:** It could be defined as the joining together of people, entities or countries, through which there is a commitment to help or support each other to accomplish a definite goal, with similar benefits for each of the parts.

**Strategy:** It is an action plan that defines the way in which an organization will use its tangible and intangible resources to achieve a better competitive advantage in its own business setting.

This being understood, we can express that strategic partnerships are, nowadays, a modality used by more and more entities of any type, to share resources well-developed and abundant in one or some, and limited in another or other.

This applies not only to the financial and human resources, but also to the commercial, technical, technological, funding, credibility, and prestige areas.

This is also known as **“agreement”**: this implies an understanding among the parts. That is to say, it could be bilateral or multilateral according to the intervening parts.

The significance of these agreements or strategic partnerships is that they are **“formal”** in nature, because it should be clear that there are common goals, usually in the long term, and for this reason they are strategic. This way each organization preserves its identity, based on mutual needs, shared risk and commitment.

And what if this formal strategic partnership works as a **“network”**? The concept of networking, under the principle of cooperation, is as old as humankind, although there is a novel contemporaneous feature. The human being in its origin could not have faced the harshness of a hostile environment without a sense of collaboration, which would enable him in his primeval groups to satisfy its impulses: hunting animals which were stronger, faster and bigger, finding room for shelter, the instinctive need for coupling, for sexual reproduction, the enlarging of territorial domains, its nomadic nature.

Perhaps the roots of the networking concept appear in the gregariousness of the human being, who lived in the paradox of survival and competition for survival. It is very hard to understand the contemporary existence of humankind, if one cannot understand the existence of forms of partnership and competition. Partnership and competition will be, in the history of humankind, two central concepts that accompany its organizational structures, and in the center there is a search for power that travels all through and to modern times.

The concept of networking is essentially an attribute of cooperative human behaviour which has changed, taking varied forms, and nowadays it has reached an unthinkable and unique expression. This constitutes a break in its historical expression. We can identify two basic manifestations of the networking concept as a break. One, with reference to its physical shape –and here we can consider from the fishing nets, that can catch fishes thanks to its weaving, roads networks, sewage systems, street lighting, railway networks, supermarket chains, to telephone lines and telecommunications which today make Internet possible, together with all its potential transformations.

The other manifestation of the networking concept refers to the human interactions that imply cooperation: we can consider from those used by the primitive man, to solidarity, environment, spying, academic, and even scientific cooperation networks. A new phenomenon in this scenario is the coming together of the boundaries, physical networks and knowledge, producing a transformation in the ways in which knowledge is formed.

## Partnerships between destinations.

So far I have been developing concepts that could be applied to any kind of partnership. With reference to touristic destinations in general, and destinations specially identified with **“meetings”** in particular, the issue is if one can imagine a partnership scenario where destinations, no matter their geographical location, naturally **“compete”** to get, maintain, or build loyalty with the markets in its diverse segments.

This true and strong option has its foundations in the existence of two propelling forces, very clear and evident: the growth of technology and the internationalization of the markets. This integration has been favoured by the huge advances in computing, communication and transportation technologies. It is clear that the world is becoming, thank to these, in a single marketplace, in which the competitiveness is more intense every day, raising the standards for competitive success.

Even if the first initiative when joining in a partnership is to capture the market through the addition of resources and joint action, the ideal thing in a partnership among destinations is to visualize their capacities as complementary, because in that way they will contribute to create unique opportunities to develop those capacities. On the other hand, it is becoming increasingly noticeable that those destinations which are focused on their main capacities achieve better outcomes than those which attempt to include it all.

Partnerships among destinations can secure products or services in many ways. In order to find the opportunities, it is necessary to ask what combinations of capacities -one's own and the others'- could best satisfy the market needs. It is this cooperative attitude that places this destination in an advantageous position in comparison to its competitors, which still believe that can do everything on their own.

The aim of partnerships among destinations (two or more) should be associated likewise with the need to cut down times in a global market, where the key of competitiveness is -precisely- speed. As critical goals for this process, for a destination I will consider the following:

- **To ensure the growth and constant development of the organization and investment.**
- **Presence in new markets and/or segments.**
- **Diversification of markets and products.**
- **Reduction of costs and expenses.**
- **Capitalization of other touristic products generated in the communication process.**
- **Acquisition and/or belonging to strategic technology.**
- **Neutralization of competitors.**
- **Approach to key clients.**
- **Entering local, regional, national and international markets.**
- **Focusing on key capacities.**

The end goal of partnerships among destinations, to sum up, should be to achieve better competitiveness through the strengthening of the parts. This would be aimed to attain a bigger and better use of technology, more efficiency in the communication channels and visibility, and optimization of resources. This way it is clear that there is a direct benefit for the market -which finds an interesting and reliable opportunity

in the information provided by this alliance, and in the direct and indirect economic impact that the implicated destination(s) will obtain.

## **Idea, process, work and results in pursuit of a partnership between destinations.**

In this era of networking and competitiveness, the safe road for the growth and development of destinations is through strategic alliances. Given so many and so innovative changes, one could see that no destination -or business- would have sustained growth solely on its own basic operation, and therefore it would need to form alliances to do so.

That was the original, primary idea that came up when a numerous group of people, almost two hundred, members of the 29 Convention and Visitors Bureaus in Latin America started thinking about a work association for internal training, visibility and offer of the regional block. Of course, at that time without any knowledge on how to perform it. It is worth mentioning how different we were from one another, due to our latitudes and origins, and also lifestyles, but also similar in the language -even Brazilians and their renowned portuñol (combination of Spanish with Portuguese). All the members appeared filled with enthusiasm and willing to improve standards, doing it with a permanent pride in their individual countries, but also a strong sense of Latin American block.

And the first step was when they self-organized into the Primer Encuentro Latinoamericano de Convention and Visitors Bureaus (First Latin American Meeting of Convention and Visitors Bureaus) in September 2008 in the city of Rosario, Argentina, where they started this path of concerns, interchange, suggestions and learning that led them, year after year to each of the following meetings in 2009 in Belo Horizonte (Brazil), 2010 Asuncion (Paraguay), 2011 Salta (Argentina), and towards the need to group formally in what is nowadays the Asociación Latinoamericana de CVBs (Latin American CVBs Association), materialized in the city of Bogota (Colombia) during the Fifth Meeting, in November 2012.

And there were many reasons. But above all of them, which undoubtedly is born the same moment each CVB is formed at each destination, is the seminal concept that "we all work for our destinations". Our job is not only to get more meetings; it is also to open our entities and goals to the cities we are a part of: to make them aware of the fact that the meetings industry is a true success, that at the same time brings training of human resources, and that has an added value in the economic and social environment that it produces, providing unlimited ways to re-create oneself to be out in the market and grow.

And this also has to do with competitiveness. But we need to be aware: to compete, one needs to commit to be ethical,

authentic, professional, and institutionally conscious of the fact that we represent our destinations entirely and not a part of them.

This competitiveness, we are turning it into **“coopetiveness”**, in its accurate meaning of **“cooperative competitiveness”**.

This is why we need a partnership, because we live this every day, because communications nowadays allow us to be more dynamic and versatile in a market where speed, response capacity, and a permanent proactive attitude are universal and well-known. To agree on a partnership means working with serious, sustainable plans so that we grow not only as key drivers within our destinations, but also to be identified as Latin America, one of the regions in this world with better development and attraction within the industry.

Several CVBs have already associated to our joint mission, many are asking, others still do not understand why we encourage this partnership. But the founders of this alliance had the vision to think of a project that will make people talk. “All Latin American destinations represented by the CVBs will be member without paying for the customary regular fees”. Same as in soccer, nobody needs to pay a fee to be fan of a club. Of course, if one wants to go to the stadium and see the matches and maybe even sit at a comfortable chair, or make use of that club’s facilities, one should pay something. But in that case, and going back to the destinations: if one desires to participate in a single or all the planned activities, they could be paying for it, through private sponsors’ funding.

There are no more secrets: more than 200 Latin American destinations, joined together in a fantastic web portal soon to be presented, will allow the global market to access centralized tools for online budgeting, meetings calendar and even an annual virtual.

What is important is to be true and rational allies. It is well known that associations are usually the evidence of complexity arising from the sharing of many different points of view, knowledge, administrative authority, social links and organizational cultures.

One of the barriers when trying to put a partnership into action is given due to the lack of knowledge: being unable to measure all the advantages that it brings to be able to access new markets and have continuous growth. This is why we should work on internal communication, to get increased involvement.

Today the process of building this partnership is consolidating with a given methodology, a goal. This process is escorted by undisputed leaders of the global industry that work disinterestedly so that we, together, can give a real “push” to this region.

We are still working, the formal beginning is new. The path ahead of us is the one that the members of this alliance want to imagine. Many singular stories will continue to join in, but everything will be inspired in the philosophy of cooperation through the association of mutual benefits.

To sum up, I can assure that there are a number of reasons for the creation of partnerships between destinations, but I summarize them in one: cooperation reduces risks and costs, maximizes the available resources and opens markets. Therefore, it is a key to success for those who go for it.



*Miguel Harraca*

*President*

*Asociación Latinoamericana de  
Convention and Visitors Bureaus*

*Rosario, Argentina*

# Case Study: Barcelona and Vienna



Two leading destinations strengthening their positioning through joint promotional campaigns.

Vienna and Barcelona. Barcelona and Vienna. The Central European tradition and the charm of the Mediterranean. The capital of Austria and the capital of Catalonia. Two leading destinations that have come together to carry out joint promotional campaigns. They are not competitors, they are partners. One can help the other and strength is in unity. This is especially so in the vast emerging Asian markets that can be difficult to get a foothold in.

This is the story of collaboration. A tale of two cities that have decided to join forces to promote themselves in the demanding field of the Meetings Industry. In times of globalization when each metropolitan and regional brand is striving to differentiate themselves, Vienna and Barcelona -Barcelona and Vienna- decide to launch a joint promotion experience. Back in 2007, before the outbreak of a recession that has shaken economies across the world, especially Western ones, the capitals of Catalonia and Austria showcased in China's CIBTM trade fair with a joint promotion campaign for both destinations. The

aim: to save costs and time for customers by promoting the two cities sharing the same stand.

The experience is very positive. The campaign's results and take-up back up this idea, and a decision is taken to intensify what is a new, unique form of cooperation in the meetings industry. This Barcelona-Vienna brand guarantee is extended to the United States, the sum of two leading European cities each with their own identity in the market. Several commercial visits are carried out showcasing the attributes of both these destinations, and this is received very well by U.S. customers, especially because of the innovative nature of this project.

In conjunction to campaigns in the U.S. market, Barcelona and Vienna's convention bureau have set their joint promotional activity priorities on the Asian market. Their individual positioning here in the business tourism area is not as high profile as in the United States, so they are looking to raise the market's awareness and position themselves as Europe's best





cities for events. That is why they have continued to share a stand at the CIBTM fair in China, also carrying out joint sales presentations in India in 2009.

Barcelona's tourism board's Barcelona Convention Bureau (BCB) is celebrating three decades of work this year. Thirty years working to make the Catalan capital into one of the top meetings destinations in the world. BCB has been one of Spain's leading convention bureaus. A story that stretches back three decades well before hosting the 1992 Olympic Games in Barcelona, and one which has now been given fresh impetus thanks to new management.

With a new manager at its head, also under the direction of Pere Duran, the new Barcelona Convention Bureau has intensified its commitment to joint promotion campaigns with Vienna in recent times. The two cities' tourism management structures have a close working relationship, endorsing a modus operandi of joint promotion which adds to and combines their individual strengths.

What's more, this partnership's joint scope of action is to be broadened. Both from the magnificent Austrian capital and the emerging capital of Catalonia on the shore of the Mediterranean, this commitment has been scaled up to address the association market.

In market studies carried out regularly in major international markets, we can see a novel trend with several major medical associations in Europe reducing the number of locations where they hold congresses. This is a good opportunity for joint promotions between these two cities, which until now had only been used in the corporate meetings segment.

The idea of joint promotion strategies addressed at associations started in 2012, with shared Barcelona-Vienna bidding tenders offering conference organizers the possibility of alternating between the center and south of Europe, with what is a varied and attractive offer.

This has had very positive results for both cities. The highly-attractive synergies of this Austrian-Mediterranean positioning has been very well received, both amongst key market players in the United States, which is a top priority for both cities, as well as across the whole of Asia, a destination for the future. This meeting point, a synthesis between two European urban destinations, also translates into a good sales proposition in terms of marketing. Good sales arguments are very welcome in this highly-competitive international market, in which many urban and regional brands are competing to attract business for their destinations.

With the help Barcelona gives Vienna, and vice versa, they are at least doubling the business opportunities for both destinations, especially in terms of attending trade fairs, by exchanging visits to our stands. Although the returns on this collaborative effort aimed at resource optimization are already evident, Vienna and Barcelona are already winning important congresses shared between both cities.


This is a small story of success, which we can explain with a certain humility, but one which we are very hopeful for.



*Christoph Tessmar*

*Director*

*Barcelona Turisme Convention Bureau*



# The IMEX Politicians Forum and its contribution to creating awareness and understanding of the value of the Meetings Industry among international Governments.

The Meetings Industry has now become widely accepted by Governments around the world as a major contributor to a nation's financial and knowledge economy. However, the focus of this contribution is very much at the local level, i.e., the city. Recognizing this important fact, the need to create even more awareness of the industry and the need to provide an opportunity for politicians, both national and local, to exchange information and best practices led to the creation of the IMEX Politicians Forum. <http://www.imex-frankfurt.com/politforum.html>

**“The growth and success of the meetings and events industry is impacted by decisions made within transport, culture, trade and industry departments at all levels. It’s important to understand the true nature and size of this sphere of influence and to recognize that our agenda is our government’s agenda. This industry can lead economic growth”**

Nick de Bois, MP, UK (Chair of the All-Party Parliamentary Group)..

Now in its 11th year, the IMEX Politicians Forum is held in May each year in Frankfurt, Germany in conjunction with the IMEX tradeshow. The Forum welcomes over 100 industry leaders and 30-40 policy leaders from across the globe, who come together to explore ways they can mutually benefit from the business events and meetings industry and share best practice. The Forum also provides an opportunity for meetings industry leaders to meet with government ministers and policy-makers from around the world, with the key aim of proving the value of the meetings industry to Government and how it translates into economic benefits and business activity, job and tax revenues, with the intent of influencing policies favourable to its continued growth.

**“This Forum was very important for my understanding of the meetings industry and its needs. The most important message is that we must have discussion between professionals and politicians. It’s also very important that**



**the professionals go to the politicians not only when they have special demands but after the events, too – with good or bad results – to explain, search for new proposals together and so on. The second thing is to reinforce good collaboration between all the people responsible for a city’s tourism.”.**

Laurent Wehrli Minister of Economy, Tourism & Culture, Montreux, Switzerland

At the 2013 Forum, a Declaration of Support for the Meetings and Events Industry was signed by all the politicians present providing a focal point for extended promotion and lobbying activity. The objective of launching this initiative and its subsequent promotional campaign is to have government formally recognize business events and meetings as a major driver of economic growth and development and to elevate it as a priority in the global political and economic policy agenda.

The Declaration of Support has fired the industry’s imagination on several levels, newer and emerging markets, for example, have been quick to recognize its potential. Destinations across the world are using it to communicate the industry’s strengths to their local and national politicians and encourage support and progress.

The declaration is intended to act as a public roll-call of politicians who understand the full economic impact of the meetings and events industry on their communities. It also highlights the industry’s role in building and sustaining local knowledge economies, creating employment, encouraging regeneration and stimulating infrastructure investment.

The Politicians Forum concept continues to expand around the world through a series of IMEX alliances. Destination focused Politicians Forums are held in Sweden, Germany and Ukraine. IMEX has also launched the IMEX Policymakers Forum in Las Vegas in conjunction with The U.S. Travel Association. This Forum is a vital North American initiative to bring together political and industry leaders to influence policy and political change and to have governments formally recognize the meetings and events industry as a major driver of economic growth and national urban/suburban development.

<http://www.imexamerica.com/events/forums/policymakers-forum/>

**“Travel for business meetings and events is a force in the U.S. economy. Policymakers can see this multi-billion dollar industry at work, as well as a vast number of the American jobs it supports first hand, during IMEX America in Las Vegas.”**

Roger Dow, President and CEO U.S. Travel Association

The Politicians Forum is held under the auspices of the Joint Meetings Industry Council (JMJC) whose membership comprises the leading international meetings industry associations. It is organized by IMEX in collaboration with European Cities Marketing (ECM), a pan-European network of tourist offices and convention bureau, and the International Association of Congress Centers (AIPC).



*Tom Hulton*

*Director of International Relations*

IMEX



# Effective B2B Destination Marketing Actions – Travel Trade Events Organization

The Athens Development and Destination Management Agency (ADDMA) is the City of Athens official development agency responsible for the local economic development of the city and the promotion of Athens as a modern, sustainable and inclusive year round city break and MICE destination.

Within the framework of the City of Athens' development and tourism promotion action plan aiming to highlight Athens in the international tourism market, ADDMA reached a cooperation agreement of strategic importance with the European Tour Operators Association (ETOA) for the organization of the Travel Trade Workshop on an annual basis.

The strategic agreement signed with ETOA, one of the most dynamic institutions in the European travel market, comes to support the City's strategic goals towards strengthening the international image of the Greek capital in the global tourism community as well as the targeted promotion of its tourism product and services in the Leisure and City Break as well as in the MICE markets.

Travel Trade Athens (TTA) is the signature trade event for the City of Athens offering Athens tourism industry and suppliers a unique chance to showcase their services & products and meet individually qualified international buyers personally in pre-arranged meetings. The purpose of Travel Trade Athens Workshop is to showcase the varied tourism product of the city through the experienced eyes of ADDMA and the Athenian tourism industry.

The first TTA took place on April 20-21st 2013 at the New Acropolis Museum, a perfectly appropriate venue, committed to showcasing the modern elements of one of the world's most historical cities.

One hundred eighty [180] delegates attended the event and a total of 1,400 individual meetings were held with the aim to increase tourism trade deals, international networking and create the appropriate channels of cooperation. Specifically, the Travel Trade Athens 2013 Workshop brought together a dynamic mix of contractors and product developers with city tourism professionals and individual suppliers. This



arrangement mirrors contracting needs and reflects how clients view the prospective destination of Athens.

In terms of the event's structure, the first day followed a B2B meetings format and was fully dedicated to a series of pre organized B2B appointments amongst the tourism buyers and suppliers attending from Europe and select emerging markets, on the basis of a prior screening of the company profiles submitted by participants.

Two special fam trips were organized for hosted buyers and travel journalists during the second day, showcasing the variety of the local tourism product. In parallel, the Travel Trade Workshop served as a forum in order to provide special informational sessions for all suppliers participating at the Travel Trade Athens workshop featuring special trends, tips and niche market overviews delivered by top representatives of supporting international travel associations. According to the strategic focus of the city on niche target markets, the TTA workshop was additionally supported by the International Congress and Convention Association ICCA, the World Youth Student & Educational Travel Confederation WYSE and the International Gay & Lesbian Travel Association IGLTA. The perspective provided by the key note speakers enabled all participants to evaluate the structures, opportunities and challenges in the travel market.

In addition, all buyers and suppliers had further networking opportunities through prearranged social activities aimed to deepen knowledge of the regional and local tourism product.

The key conclusions from the workshop, highlighted by all participants were a) the presentation and promotion of the tourism product of Athens, b) the development of meaningful professional ties between the local tourism industry and tourism professionals from the Greek capital's international target markets, and c) the emergence and establishment of Athens as the primary and exclusive travel destination in the international tourism market with actions highlighting the comparative advantages of the city and the service quality it can offer to its visitors.

The success of the first TTA organization is evident in the relevant delegate satisfaction survey results which showed a higher than 80% level of overall satisfaction and more than 90% of delegates interested in participating in next year's event. Consequently, according to initial planning, this signature event is planned to take place for the second time in 2014, further enhancing the position of the City of Athens as an ideal leisure and business destination and the long term development of business ties amongst its tourism industry professionals and quality buyers from key markets.



*Alexis Galinos*

CEO

*Athens Development and  
Destination Management Agency  
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Which is the  
Ideal Business  
Mix in a  
Destination  
*Speaking from  
South America...  
much more than  
natural beauty*



This is a complex question that we aim to answer from the different angles which we have learned throughout the long years of professional work in the trade, institutional incorporation, relations and learning – all indissolubly linked - brought about by coincidence at international events, just to mention a few reasons.

Many hundreds of affirmations have been made at different forums in order to respond to this question, which is the origin to this particular article. I estimate that in so many words, we can all equally attest to this: the work has to be shared by both the public and private sector, in their respective areas of responsibility. A simple phrase, whose practical content of implementation is enormous, difficult and complex.

Two other factors assertively modified by the passing of time are referred to: (a) The PCOs themselves have not recognized the magnitude and importance of the activity we develop and represent, they act more like “big or small orchestra directors” for which – according to its characteristics – more or less members of partial services gathered; and (b) insistence of conceptualizing, marketing and advertisement of our countries individually as a multi-destination, with which the focus of the true capacity and vocation in each one of them was lost.

Now referring to the present trends, we would have to talk about being sustainable, innovators and versatile destinations, socially responsible, technologically capable in the most diverse fields; with institutional strength, client-organizer and client-destination understanding in the conceptualization and development of an event throughout the different phases.

On the other hand, there are the issues of to which our institution is giving special attention, such as training, actualization and certification with professionals and international competitive destinations in order to capture markets for the Region.

From here on, we will be shredding all the earlier mentioned assertions.

### **Joint work**

A statement like this might result as obvious, but it is not. Not all the governments of the Region allow themselves the space

to agree on the analysis of the country, as a destination for the different market segments; specially knowing the requirements of the meetings market and its potential; how to target and obtain international market share.

There are recent Latin American experiences where it is clearly evident that working together with the public and private sectors in Meetings and Events Tourism has a natural consequence: an escalation in position in the world ranking of the business. The end is by all means the same: to capture the greatest number of international meetings for their destinations.

To mention only a few examples in our Region, this is how Argentina went from 186 international meetings in 2011 to 202 in 2012, Brazil from 304 to 360, Chile from 87 to 101, Panama from 32 to 39, Uruguay from 46 to 56 and Mexico is in the top 25, according to the ICCA statistics. Nothing happens by chance, it is all about identifying the opportunities in a joint manner, timing for candidate presentation, which are elements that will win over our competitors, even managing our own weaknesses.

Panama is working on the restructuring of its Conventions and Visitors Bureau, with a public and private mixed composition. The substantial investment of Embratur for the growth and development of the segment, speaks of the official support Brazil has given to the international meetings and events market. In Argentina they are working hand in hand, putting aside any political differences, in order to attract to their different cities, the maximum possible number of global meetings, without relent and with great success.

Another element in this same aspect is the strengthening of the associations and institutions which play a fundamental role, at which time when they are the counterpart and the national support of the international meetings for which we all compete. In some of our countries, on the contrary, we have seen the institutions weaken and with this a descent in the global ranking in the market, not only internationally but also in terms of domestic meetings.

## **Recognize the magnitude and the scope of the Destination**

Despite a large number of international organizations and its own events of the Meetings and Events Industry in existence, there are many Professional Organizers (PCOs) which are outside, not incorporated nor participants, not acknowledging the enormous scope as well as the impact of the professional activity we perform. The truth is that it is incomprehensible, as we insistently and consistently spread information updating tendencies, communicating the best practices, and contribute to networking.

Just as we need to strengthen clients – which in this business are those constituted by government, industry, associations, societies, professional schools, local and international organisms – in the same manner we should search for, belong and participate with institutions in our respective countries, which the world has proven to be collaborators with the invaluable role of training on one side, as well as on the other hand capturing markets.

PCOs and suppliers, increasing in number and as qualified as they can be, they are not sufficient today – different to those past conceptions – if the factors that should concur in qualifying an “appropriate destination” are not adequate to the demands of the market. National, state and municipal governments are part of it, with investment in projects, public policy and incentives; the cities and its communities; structures, infrastructure, services, technology, media communication, air and ground connectivity, security and integrity of goods as well as persons, visas and much more current requirements such as: the care of the ecosystem, social responsibility, practice of service as a culture, as well integrating the customer in the conceptualization and development of the events.

Another outstanding reference is the strengthening and increase of convention bureaus, which are coming about in those countries of the Region that are betting on the segment of meetings, to which for more than a decade the World Tourism Organization (UNWTO), has considered the one with the greatest potential for growth at the global level in the tourism industry. Those are the entities called upon to bring together the varied group of participants, which have impact and/or agree on, so that their represented destination achieves the most quantity of events within their competitive capability. All without losing the proper nature, identity as well as all distinguishing features with such attractions that are the motive to be elected as the destination.

We have made it an objective that Latin America be considered, more than just for its undeniable and numerous natural beauties throughout its more than 22 million square km. of area and conformed by 23 countries. Certainly for traditional tourism purposes, it is attractive to be the zone with the greatest ethnic diversity of the planet, to have practically all the climates of the world and to be home to numerous species of plants and animals. Among these countries we can observe great economical, linguistic, political and social variations.

Such as it was a common practice, the countries of the region were also promoted as multi-destinations. The truth is that each destination has its own strengths and those required by the Meetings Industry are not less. On the contrary, it is vital to focus both on the adaptation and training for this market as well as the appropriate promotion concentrated in very specific and differentiated sceneries and actions.

In any case, there is space for the positive coexistence of tourism for pleasure and business tourism: the first one will always generate higher figures in number of tourists, the second one will mean greater income in a ratio of 1 to 3. In fact many bureaus have under their umbrella the same attention of “conventions and visitors”.

## The Great Capital is Knowledge

Beyond the figures we know and have impact, as a product of international meetings, especially in those destinations which place a higher stake on this segment, the greatest obtained capital is knowledge: updating techniques, new discoveries, exchange of scientific and humanistic information, as well as the development of personal and professional relations.

Therefore, here we return to the significance that, the institutions to which we belong to in the exercise of the corresponding profession; the nomination of the venue by the destinations, accompanied by its respective associations, societies, and other competent organisms – ideally led by its bureaus – are fundamental requirements in order to compete.

To the universities in its twofold condition: on one hand, where the academics and a great part of the knowledge reside, and on the other hand, being the venue of certain particular international meetings, as their premises occupy some 22.5% of preference, as shown in the ICCA statistics, allows them to obtain a greater knowledge and experiences from other latitudes with international guests, complimenting the conventional education work in an important measure. Many of them, particularly those public centres of higher education, yet even have ahead the job of finding the legal and financial formula that allows them to embrace events and generate income by some other way than the always insufficient national budgets assigned to them.

The legacy of knowledge is as valuable or more than those left by the new or reconditioned facilities, the refurbished cities and the special training that takes place at the occasion of receiving an international event.

Nevertheless and at the same time, it is satisfactory to know about the construction of new convention centers in the Region, particularly when today they are projected with a short- and long-term sustainability plan, a condition without which it is no longer possible for the venues nor any facility in the destination to succeed.

## Special Attention

From the institution landmark of the Meetings and Events of Latin America, COCAL, we encourage looking towards this Region as a preferred place in the international market, whereas an investigation and a presentation of the destination is being developed, directed towards the prospective transmitters of their extra continental meetings. But this is accompanied by the priority represented by training and constant updating, furthermore one more step would be: towards the certification that, even being a particular requirement only in some countries brings about more confidence to the election of destinations and professionals as a whole.

Thanks to the tools that technology brings about - very attractive especially for young people - discovering a not so conventional professional activity, to those of high demand with a wide range of subjects covered by experienced non-theoretical professionals, but with achievements brought together in the most diverse areas, along with the established alliances with international institution Today training, updating and certification are ongoing throughout the Region represented by COCAL.

Is it not the joint action of the committed parties the only manner in which to attain a successful international meetings and event destination?





# Case Study: COCAL Best Practices



## **COCAL trains Latin America along with its Allies**

Along with the rest of the work – even though some years later with respect to the United States and Europe – Latin America identified the importance and the impact of the Meetings and Event industry, with this the need to associate, as well as institutional interrelation. COCAL – Federation of Congress Organizer entities related to Latin America – which is the industry representative par excellence in the Region, has worked since its creation to capture a greater percentage of the international meetings market to the countries it represents, recognizes that they must elevate the level of competitiveness and open its professional spectrum not only of their main participants but to all joint groups involved as a “Destination”, where all the members in different stages promote and manage events in Latin America.

The qualifications and certifications of each one of them will

be the rigorous element of those seeking new venues, where excellence in previous events will measure the minimum demands in the search of tomorrow's events, taking advantage of the fact that today the world has its eyes on this part of the globe as a preferred destination.

For this reason COCAL is strongly betting on training, updating and certifying professionals. First by circulating a survey on the demand of certifications in our member countries to operate as OPCs, Venue or Destination, the responses from seven of them have indicated that it is not a requirement, with the exception of Chile and Spain (the only non-Latin American country member) with respect to Venues, and of Cuba with respect to OPCs, with national programmes applied in the three countries. The majority also indicated knowing about certification programmes and all of them highlighted them as desirable for implementation. Obviously it was also important to know the international meeting generating markets in order to measure their demands.



Through the particularly close relation, on one hand, we were able to establish their objectives, gather information, identify priorities, understand each member's philosophy (country), and delimit specific parameters as well as purposes with a strategy towards our associates. Therefore, we were motivated to search for allies with international representativeness, industry leaders who could contribute identified needs. What did we do with this?

With a community comprised of more than 9,500 professionals in 46 countries throughout the world, we identified the certification of the Convention Industry Council - CIC, referred to as CMP (Certified Meeting Professional), whose programme would increase the status and presentation of a destination and its participants competing for an event.

The certifications option would come with opportunities, tools, readings, recommendations, success cases of other professionals and experts in the world, as well as practical implementation exercise, which allowed us to gather a series of webinars and online courses to keep our professionals up to date: all of them with the same opportunity, where each one of them would adapt the tools created and acquired lists to their particular needs.

Magazines, associations and industry leaders have been the ones giving us the opportunity to present COCAL through which we offer to communicate their messages.

COCAL has been collaborating with this need by offering a programme of 25 credit units (CEUs) required for the first certification, having given CIC fifteen (15) to the COCAL's academic program for 2014, which will take place in Antigua-Guatemala next March and whose content is based on the different angles of Sustainability. This in line with the strategy to promote COCAL's CMP Certification, for which those first 25 CEUs are required to obtain the certification, as well as an equal number in five years.

### **These are important added values for professionalization.**

For their part, with PCMA, the Professional Convention Management Association, through a strategic alliance in academic subjects, allows us to promote up to date standards of the industry, ethical practices stimulating the art and the science of organizing events, as well as increase the value



of event organizers sharing success stories which can be implemented by performing radical changes in the logistics and management of the events.

In the same manner, through another academic collaboration agreement, COCAL signed with ELACE – Escuela Latinoamericana de Capacitación en Eventos (Latin America School of Event Training) – for the first block of courses within the School’s portfolio, offered with a determined number of participants.

In the training area, the alliances have been extended thanks to qualified professionals who have joined this effort to constantly elevate the level of the industry’s participants in the Region, with distance education (EaD), in order to reach the more than 3,000 members belonging to COCAL through its associates. On a weekly basis and without interruption, professionals, media communication of Latin America, offer different subjects and invite to participate in academic events, which provide additional CEUs to the 50 credit units previously mentioned. The yearly goal is a minimum of 25 CEUs, with a digital platform, so everyone has access to them.

Just in this year 2013, the support certification programme has offered 45 CEUs in an academic plan for CMP certification, as well as that given by PCMA, in preparation for the certification

exam, for which COCAL is working to be the host of the CMP annual exam.

As of December 2013, we will have delivered to Latin America’s meetings industry, 54 educational newsletters, promotion of events with optimum levels for the industry throughout the region and tools to continue adopting the trends as well as success cases with the most diverse nature in the world of meetings.



*Alisson Batres de Jerez*

*OPC*

*Vicepresidenta Primera COCAL  
(2012-2014)*

*Federación de Entidades  
Organizadoras de Congresos y  
Afines de América Latina*

# Meetings Tourism in Argentina



Meetings tourism, with its vast capacity in the mobilization of millions of people and like a strong driver in the currency flows; it is the tourism sector that involves tourists – local and foreign – with strong purchasing powers, thereby dedicating higher spending in that which accounts leisure activities.

This sector, which tends to be correlated to the expansion of leisure tourism, in many cases permits the visitor to put him or herself directly in touch with the new tourism destination. To this effect, the UNWTO establishes that approximately 40 per cent of these participants of meetings tourism return to the destinations accompanied by family, friends or colleagues.

It is no coincidence that many nations sustain a strong interest in developing the meetings tourism sector in respect to the benefits they generate and numerous experiences in this sense. Whereas the chain of the value of tourism which distinguishes itself due to the high potential of its impact on a variety of economic activities, the meetings tourism sector in particular carries a strong potential for economic impact with multiple spillover effects on regional economies.

To this should be added a distinctive element to the activity, particularly considering that the meetings tourism distinguishes itself due to its strong anti-cyclical components such as seasonality that, unlike recreational tourism, is concentrated in the months outside the downturn of activities (summer, winter, and holidays) and helping to regulate the seasonality of tourist demand, heavily concentrated in the months from December to February and in July.

Protected within the service sector, the activity is labour-intensive, stimulating job creation, generally a higher average rate of human capital involved.

Beyond the activities that take part in the implementation of the event itself, others are generated which are integral to the stay of the attendees, such as: accommodation, food and transport (rail, automotive, waterway, air, auxiliary transport services), travel agency services, shows and entertainment, cultural activities, etc., all of these combined with the multiple productive links in economic activities which are not characterized by tourism on which the segment has a multiplier effect.

Within the economic sectors that are influenced by meetings





tourism, the construction sector should also be noted – one of the most labour-intensive industries that indirectly creates new jobs given that its growth demands major investment in infrastructure that can range from the construction of a conference hall to development of internet services and other technologies.

It is important to emphasize that through the boost of construction, job creation occurs, and thus the increase in worker's income resulting in an overall improved welfare of the population, which in turn gives spending power to the tourism sector and the rest of economic activities related to tourism in a reinforcing circle.

Based on demand surveys conducted in 2012 by the referents of different locations, under the framework of the Observatorio Económico del Turismo de Reuniones de la República Argentina, it tracks a wide range of expenditures by tourists that make purchases of hides, books, music, regional products, clothing, souvenirs among others. Meetings participants spent over \$900 million in such consumption in 2012, and impressive figure representing 11% of total spending by tourists to those of Congresses and Conventions, so that spending on accommodation, transport, tour packages, food, event registration, etc. could complete the mobilization of approximately \$8 billion.

The Meetings Tourism in Argentina is growing and is looking to adopt it as a strategic sector in the promotion of regional development, in a context that opens new opportunities. The largest challenge will air connectivity and accommodation space in each case.

Also to be considered is incentive travel, a resource that is increasingly used combining the organization of events and higher spending power of visitors in terms of increased financial expensing of visitors by large companies. A few years ago it was used to reward exceptional performance by employees or business partners. However, today this "elitist travel" is decreasing and it is being used more for all employees as a training objective fostering team building spirit and motivation.

In order to keep growing as a Meetings Tourism destination leader and increasing direct income with a multiplier effect, it is necessary to develop differentiated product offerings of

increased quality. The ability to target a wider geographic spread, allows for the development of regional economies in addition to defining the position of the main urban centres. This movement promotes the creation of sustainable business models using local resources and contributing to social interaction, improved productivity and greater innovation.

ICCA Statistics (International Congress and Convention Association) updated through 2012 again reflect growth in the sector ranking Argentina at No. 18 in the world, ranking 202 out of the total 11,156 international conferences. This position represents an increase in over 200% in rank in the number of international conferences carried out in comparison to the results from 2007 with those of 2012. This growth also positions the City of Buenos Aires, for the 4th consecutive year as the top city of the Americas / hosting international events. Also, the cities of Córdoba, Mar del Plata, La Plata, Rosario, Santa Fe, Mendoza, Salta, Bariloche and Tigre are in this world ranking.

Events have become the foremost promoter of tourism destinations and a congress participant who has had a positive experience in a tourist destination will automatically become a great promoter of the same.



*Diego Gutiérrez*  
President of AOCA

# Meetings Tourism in Lisbon



## The importance of meetings industry in lisbon

In the past 15 years, Lisbon has positioned itself as a global top destination for meetings. In fact, during that period, this city systematically ranked in the Top 15 of World destinations for association meetings, according to ICCA.

We like to believe that “building” this status was made possible by several reasons:

- A good geographical situation, close to the main European source markets, with the addition of being also the nearest European capital to the Americas.
- A friendly atmosphere, topped by a clear sense of safety
- A warm climate
- Good value for money

These are, then, conditions that allow Lisbon to hold a good position in a segment where international competition is fierce and constantly growing, mainly due to the affirmation of cities as engines for tourism growth.

But, why is the Meetings Industry so important for a destination like Lisbon, if it only accounts for 10 to 12% of total tourism international demand for the city, expressed in arrivals?

We can start answering this question in the classical way: Because business tourists - to which category MI segment belongs - are above-average spenders. Based on research carried out in the last five years in Lisbon, we can estimate that business tourists, during their stay, can spend approximately 30% more in the city than leisure ones. We can agree that this is a good reason and that is proven for Lisbon, but there are others.

When business tourists are willing to spend more in a destination, it can also be expected that they demand higher





quality in the services and activities provided. So this is also an important challenge for the supply side to provide, in this specific sense, higher standards in hotels and restaurants, to offer venues with top equipment and service, to create the most diverse side activities, to develop sustainability measures, to work for improving connectivity, etc. In short, the Meetings Industry is a driver for destinations to improve themselves, to become better equipped and more professional. And if you do this for a segment, you're doing it for the whole sector and for the residents, which ultimately must be the beneficiaries of tourism development. Tourism is a labour-intensive activity, and better tourism generates more qualified employment and, then, higher income for the local community. And we should not fail to mention the multiplier effects that tourism is also responsible for in other sectors of local economies, like transportation, cultural production, events, just to name a few.

Another important reason for supporting business tourism in a city like Lisbon comes from the very good chances that a business tourist has of repeating the visit, whether for recreational or professional purposes. The good experience he or she may get during a meeting held there is an invitation for the future – and that's why it is extremely important to note that successful destinations are those that provide good experiences, based on quality, variety and difference. Furthermore, meeting delegates can additionally work as "ambassadors" of the destination among friends and family who don't have previous contact with the destination. Once

again, the "good experience" needs to be fulfilled, and the MI segment, is traditionally one where this concern is more developed in people's minds, due to its direct effect in per capita revenue.

In Lisbon that's what we try to do with all our energies, in the knowledge that, at the same time, other destinations are perfectly aware of these issues, and that, because of that, international competition in tourism activity, and especially the MI segment, is increasing substantially. But that's also a challenge for improvement, in an activity that – let's never forget - is demand driven.



*Alexandra Baltazar*  
Manager

