

Table of contents

Acknowledgments 9

Foreword 11

Executive summary 13

Introduction 19

Phase 1 Strategic review 21

Chapter 1 MCCI industry overview 23

- 1.1 Description and background of MCCI industry 24
 - 1.1.1 The meetings industry: definitions 25
 - 1.1.2 Detailed description of segment and sub-segments 26
 - 1.1.3 Global and regional trends affecting segments 34
- 1.2 Overall drivers and barriers 35
- 1.3 Social contribution of MCCI 35
- 1.4 Economic contribution of MCCI 37

Chapter 2 Association conventions and congresses: analysis and profile 39

- 2.1 Characteristics and activity 39
 - 2.1.1 Event types 39
 - 2.1.2 Subjects of meetings 41
 - 2.1.3 Venues used 42
 - 2.1.4 Activity 43
 - 2.1.5 Duration of events 47
 - 2.1.6 Average budget and spend 49
 - 2.1.7 Importance of exhibitions at conventions 50
- 2.2 Association conventions and congresses key trends 50
- 2.3 Perception of value: the new consumer 51
 - 2.3.1 Content capture/distribution with use of technology 51
 - 2.3.2 Higher expectations of returns on investment (ROI) 52
 - 2.3.3 Meeting rotation and selection of destination 53
 - 2.3.4 Geographic shift in meetings 54
 - 2.3.5 Risk adversity and safety 54
 - 2.3.6 Forging partnerships and alliances 55
 - 2.3.7 Trust in capabilities: from outsourcing to in-house management and local support 56
 - 2.3.8 Sustainable framework within organizational model and corporate social responsibility (CSR) 57
- 2.4 Emerging trends and forecast 58
 - 2.4.1 Towards constant innovation and engagement 58
 - 2.4.2 Investing in future leaders 59
 - 2.4.3 Influencing the evolving policy and regulatory environment 59
- 2.5 Key players: service offerings 60
 - 2.5.1 International associations 60
 - 2.5.2 In-house meeting planner 60
 - 2.5.3 Professional conference organizer (PCO) 61
 - 2.5.4 Association management company (AMC) 62
 - 2.5.5 Local hosts 62
 - 2.5.6 Destination management companies (DMC) 62
 - 2.5.7 Event management companies 63
 - 2.5.8 The role of convention bureaux 63
- 2.6 Decision-making: buying processes 65
 - 2.6.1 Internal association objectives 66
 - 2.6.2 Channels 67
 - 2.6.3 Key determinants 68
- 2.7 Financial and economic models 71
- 2.8 Drivers and barriers of the segment 72
- 2.9 Supply chain analysis 72
- 2.10 Destination Europe: characteristics 74

- 2.11 Destination North America: characteristics 76
- 2.12 Destination Asia: characteristics 78
- 2.13 Characteristics of other regions 80
- 2.14 Association conventions and congresses segment conclusion 80

Chapter 3 Corporate meetings: analysis and profile 83

- 3.1 Characteristics and activity 83
 - 3.1.1 Event types 83
 - 3.1.2 Venues used 85
 - 3.1.3 Activity 85
- 3.2 Corporate meetings key trends 87
- 3.3 Decision-making: buying processes 91
- 3.4 Key players: service offerings 92
- 3.5 Drivers and barriers for the segment 92
- 3.6 Supply chain analysis 93
 - 3.6.1 Internal meetings: corporate value chain 93
 - 3.6.2 External meetings: supply chain 93
- 3.7 Destination Europe: characteristics 94
- 3.8 Destination North America: characteristics 95
- 3.9 Destination Asia: characteristics 96
- 3.10 Characteristics of other regions 96
- 3.11 Corporate meetings segment: conclusion 97

Chapter 4 Incentives: analysis and profile 99

- 4.1 Characteristics and activity 99
 - 4.1.1 Venues used 100
 - 4.1.2 Activity 100
 - 4.1.3 Budget spend 101
- 4.2 Key trends 102
- 4.3 Key players 104
- 4.4 Decision-making: buying processes – key determinants for incentive destination selection 105
- 4.5 Financial and economic variables 107
- 4.6 Drivers and barriers of the segment 108
- 4.7 Supply chain analysis 108
- 4.8 Destination Europe: characteristics 109
- 4.9 Destination North America: characteristics 110
- 4.10 Destination Asia: characteristics 111
- 4.11 Characteristics of other regions 111
- 4.12 Incentives segment conclusion 112

Phase 2 Analysis of the decision-making processes of MCCI organizers 115

Chapter 5 The decision-making process of MCCI organizers 117

- 5.1 Methodology 118
- 5.2 Typologies of decision-making processes 119
 - 5.2.1 Association conventions and congresses 119
 - 5.2.2 Corporate meetings 124
 - 5.2.3 Incentives 128

Chapter 6 Association conventions and congresses: needs and expectations 131

- 6.1 What association meeting planners want 131
- 6.2 Description and evaluation of key criteria 131
 - 6.2.1 Financial considerations 133
 - 6.2.2 Venue size and configuration 134
 - 6.2.3 Risk adversity and safety 136
 - 6.2.4 Appeal of destination 136
 - 6.2.5 Access 137
 - 6.2.6 Accommodation 138
 - 6.2.7 Other key criteria influencing association meeting planners 139
- 6.3 Decision-makers vs. -influencers (roles of intermediaries) 140
 - 6.3.1 Local chapter assistance/ambassadors 143
 - 6.3.2 Professional conference organizers (PCOs) 144

- 6.3.3 Destination management companies (DMCs) 144
- 6.3.4 Online meeting management tool 144
- 6.4 Key trends affecting decision-making and lead times 145
- 6.4.1 Organizational resources and characteristics 145
- 6.4.2 Information channels 146
- 6.5 Role of convention bureau in bidding and decision-making 148
- 6.6 Value of ambassador programmes 149
- 6.7 Conclusions 153

Chapter 7 Corporate meetings: needs and expectations 155

- 7.1 What corporate meeting planners want 155
- 7.2 Description and evaluation of key criteria 155
 - 7.2.1 Appeal of destination 156
 - 7.2.2 Financial considerations 159
 - 7.2.3 Access 160
 - 7.2.4 Venue size and configuration: facility package 161
 - 7.2.5 Other key criteria influencing final decisions 163
- 7.3 Decision-makers vs. -influencers 164
 - 7.3.1 Destination management companies (DMCs) 165
 - 7.3.2 Hotel national sales office 166
 - 7.3.3 Third party planners 166
 - 7.3.4 Online meeting management tools 166
 - 7.3.5 Site selection firms 166
- 7.4 Role of convention bureau in decision-making 166
- 7.5 Conclusions 169

Chapter 8 Incentives: needs and expectations 171

- 8.1 What incentive meeting planners want 171
- 8.2 Description and evaluation of key criteria 171
 - 8.2.1 The 'wow' factor 172
 - 8.2.2 Safety and security: risk assessment 174
 - 8.2.3 Financial considerations 175
 - 8.2.4 Access 177
- 8.3 Decision-makers vs. -influencers (roles of intermediaries) 178
 - 8.3.1 DMCs, hotel national sales offices, third party planners, local chapter assistance, online meeting management tools and PCOs 179
- 8.4 Role of convention bureau in decision-making 180
- 8.5 Conclusions 182

Phase 3 Best practices: convention bureaux in Europe, America and Asia 183

Chapter 9 Best practices: convention bureaux in Europe, America and Asia 185

- 9.1 European landscape 186
 - German Convention Bureau (GCB) 188
 - Serbia Convention Bureau (SCB) 191
 - Vienna Convention Bureau (VCB) 194
 - Prague Convention Bureau (PCB) 197
- 9.2 American landscape: North and Latin America 199
 - 9.2.1 North America 199
 - Tourism Vancouver 200
 - 9.2.2 Latin America 203
 - Greater Bogotá Convention Bureau (GBCB) 204
- 9.3 Asian landscape
 - Malaysia Convention & Exhibition Bureau (MyCEB) 208
 - Singapore Exhibition & Convention Bureau (SECB) 211

Chapter 10 Key findings and recommendations 215

Annexes 217

Annex 1 List of contacts for the primary research 217

Annex 2 Sample survey for the European association conventions and congresses segment 221

List of abbreviations and acronyms 225

List of figures and tables 227

References and bibliography 231