



**UNWTO**  
PUBLICATIONS

# Overview of the Meetings Industry in Asia

prepared with the support of:



Ministry of Culture, Sports  
and Tourism  
Republic of Korea



KOREA  
TOURISM  
ORGANIZATION



# Overview of the Meetings Industry in Asia

Copyright © 2017, World Tourism Organization (UNWTO)

Cover photo: copyright © Aomami | Dreamstime.com – Songdo, Republic of Korea

### Overview of the Meetings Industry in Asia

ISBN printed version: 978-92-844-1855-8

ISBN electronic version: 978-92-844-1856-5

Published by the World Tourism Organization (UNWTO).

First printing: 2017

All rights reserved.

Printed in Spain.

The designations employed and the presentation of material in this publication do not imply the expression of any opinions whatsoever on the part of the publishers concerning the legal status of any country, territory, city or area, or of its authorities or concerning the delimitation of its frontiers or boundaries.

World Tourism Organization (UNWTO)

Calle Capitán Haya, 42

28020 Madrid

Spain

Tel.: (+34) 915 678 100

Fax: (+34) 915 713 733

Website: [www.unwto.org](http://www.unwto.org)

E-mail: [omt@unwto.org](mailto:omt@unwto.org)

**Citation:** World Tourism Organization (2017), *Overview of the Meetings Industry in Asia*, UNWTO, Madrid.

All UNWTO publications are protected by copyright. Therefore, and unless otherwise specified, no part of an UNWTO publication may be reproduced, stored in a retrieval system or utilized in any form or by any means, electronic or mechanical, including photocopying, microfilm, scanning, without prior permission in writing. UNWTO encourages the dissemination of its work and is pleased to consider permissions, licensing, and translation requests related to UNWTO publications.

Permission to photocopy this material in Spain must be obtained through:

CEDRO, Centro Español de Derechos Reprográficos

Calle Monte Esquinza, 14

28010 Madrid

Spain

Tel.: (+34) 913 08 63 30

Fax: (+34) 913 08 63 27

Website: [www.cedro.org](http://www.cedro.org)

E-mail: [cedro@cedro.org](mailto:cedro@cedro.org)

For authorization of the reproduction of UNWTO works outside of Spain, please contact one of CEDRO's partner organizations, with which bilateral agreements are in place(see: [www.cedro.org/en](http://www.cedro.org/en)).

For all remaining countries as well as for other permissions, requests should be addressed directly to <http://publications.unwto.org/en/content/rights-permissions>.

# Table of contents

	<b>Acknowledgments</b>	<b>7</b>
	<b>Forewords</b>	<b>9</b>
	by Talef Rifai, UNWTO Secretary-General	9
	by Gary Grimmer, Chief Executive Officer, GainingEdge	10
	<b>Executive summary</b>	<b>11</b>
<b>Chapter 1</b>	<b>An introduction to the meetings industry</b>	<b>17</b>
1.1	Benefits beyond tourism	18
1.1.1	Case study: International AIDS Conference 2004 – Bringing change and progress	19
1.2	Differences between the meetings industry and tourism	20
1.2.1	Case study: the role of Australian Government agencies	22
1.2.2	Case study: the meetings industry in the United Kingdom	23
1.3	Meetings industry branding	24
1.3.1	Case study: the meetings industry in Monaco	24
<b>Chapter 2</b>	<b>The meetings industry: market segments and profiles</b>	<b>25</b>
2.1	Corporate meetings	26
2.1.1	Corporate meeting trends	27
2.2	Incentive travel	28
2.2.1	Incentive travel trends	29
2.2.2	Case study: “A Journey to Remember”	30
2.2.3	Case study: insights into incentives	30
2.3	Association congress	31
2.3.1	Association congress trends	35
2.4	Exhibition	37
2.4.1	Exhibition trends	39
2.4.2	Case study: approved International Fair (AIF) scheme	40
<b>Chapter 3</b>	<b>Trends, challenges and opportunities</b>	<b>41</b>
3.1	New platform tourism services (sharing economy)	42
3.1.2	Case study: San Francisco Travel Association (SFTA) and Airbnb	42
3.2	Sustainable practices	43
3.2.1	Case study: 15th Conference of the Parties (COP 15)	43

<b>3.3</b>	Knowledge exchange and transfer	44
<b>3.3.1</b>	Case study: Danish Meetovation	45
<b>3.4</b>	New opportunities through new technologies	45
<b>3.4.1</b>	Case study: the Internet of Things (IoT)	46
<b>3.5</b>	Unique experiences and personalization	47
<b>3.5.1</b>	Case study: Powered by Emotion	47
<b>3.5.2</b>	Case study: no cookie cutters in Sydney	47
<b>3.6</b>	Turning data into action	48
<b>3.7</b>	Emerging regions and cities	48
<b>3.7.1</b>	The Middle East	48
<b>3.7.2</b>	Second tier cities	49
<b>3.8</b>	New expectations, new standards	49
<b>3.8.1</b>	Case study: managing food waste standard operating procedure (SOP)	50
<b>3.9</b>	Measuring success	50

---

<b>Chapter 4</b>	<b>Responding to trends and changes</b>	<b>53</b>
------------------	---	-----------

---

<b>4.1</b>	Mapping regional specialities in the Republic of Korea	53
<b>4.1.1</b>	Daegu: nourishing homegrown stars	54
<b>4.2</b>	Thailand MICE Venue Standard (TMVS) as ASEAN blueprint	55
<b>4.2.1</b>	Setting the bar	56
<b>4.3</b>	Malaysia's <i>Kesatria</i>	56
<b>4.3.1</b>	Local champion, global host	57
<b>4.4</b>	Destination marketing in Taiwan Province of China	58
<b>4.5</b>	Singapore	59
<b>4.5.1</b>	SACEOS initiatives	60

---

<b>Chapter 5</b>	<b>Overview of the meetings industry in Asia</b>	<b>61</b>
------------------	--	-----------

---

<b>5.1</b>	Hong Kong, China	63
<b>5.1.1</b>	Hong Kong, China, SWOT snapshot and market segments	64
<b>5.1.2</b>	Hosting the region's association community	66
<b>5.2</b>	India	66
<b>5.2.1</b>	India SWOT snapshot and market segments	67
<b>5.2.2</b>	The "Happening Hyderabad" Campaign	70
<b>5.3</b>	Indonesia	71
<b>5.3.1</b>	Indonesia SWOT snapshot and market segments	72
<b>5.3.2</b>	Bali: risk management planning	74
<b>5.4</b>	Japan	75
<b>5.4.1</b>	Japan SWOT snapshot and market segments	77
<b>5.4.2</b>	Kyoto: Trailblazing the green path	79

<b>5.5</b>	Macao, China	80
<b>5.5.1</b>	Macao, China, SWOT snapshot and market segments	81
<b>5.5.2</b>	New direction for Macao, China, mega events city	83
<b>5.6</b>	Malaysia	84
<b>5.6.1</b>	Malaysia SWOT snapshot and market segments	85
<b>5.6.2</b>	Sarawak, Malaysia	87
<b>5.7</b>	Philippines	88
<b>5.7.1</b>	Philippines SWOT snapshot and market segments	89
<b>5.7.2</b>	Grand Dame Manila	91
<b>5.8</b>	Singapore	92
<b>5.8.1</b>	Singapore SWOT snapshot and market segments	92
<b>5.8.2</b>	Future ready	95
<b>5.9</b>	Sri Lanka	96
<b>5.9.1</b>	Sri Lanka SWOT snapshot and market segments	97
<b>5.9.2</b>	The rising phoenix	99
<b>5.10</b>	Taiwan Province of China	99
<b>5.10.1</b>	Taiwan Province of China SWOT snapshot and market segments	100
<b>5.10.2</b>	Kaohsiung: master makeover	101
<b>5.11</b>	Thailand	102
<b>5.11.1</b>	Thailand SWOT snapshot and market segments	103
<b>5.11.2</b>	Capabilities development	106
<b>5.11.3</b>	Chiang Mai	106
<b>5.12</b>	New generation destinations	107
<b>5.12.1</b>	Cambodia	108
<b>5.12.2</b>	Lao People's Democratic Republic	108
<b>5.12.3</b>	Myanmar	109
<b>5.12.4</b>	Viet Nam	110

---

<b>Chapter 6</b>	<b>Convention centres: gearing up for the future</b>	<b>113</b>
------------------	--	------------

---

<b>6.1</b>	The new world	114
<b>6.2</b>	New trends	115
<b>6.3</b>	More than bricks and mortar	115
<b>6.3.1</b>	Case study: better health prints – The Healthy Venues Award	116
<b>6.3.2</b>	Case study: sustaining a winning edge	117
<b>6.4</b>	Convention centres in Asia and the Pacific	118

---

<b>Chapter 7</b>	<b>China</b>	<b>121</b>
------------------	--------------	------------

---

<b>7.1</b>	Way of the Dragon	122
<b>7.2</b>	China SWOT snapshot	124

<b>7.3</b>	Market segments and profiles	124
<b>7.3.1</b>	Corporate incentive	124
<b>7.3.2</b>	Association congress	125
<b>7.3.3</b>	Case study: Chinese community reunions and business networks	126
<b>7.3.4</b>	Exhibition	127
<b>7.3.5</b>	Case study: the Health Industry Summit (THIS)	128
<b>7.4</b>	Tale of three cities	129
<b>7.4.1</b>	Beijing	129
<b>7.4.2</b>	Shanghai	131
<b>7.4.3</b>	Hangzhou	132
<b>7.5</b>	China inbound tourism	133
<b>7.6</b>	China outbound tourism	134
<b>7.6.1</b>	Chinese business travel	135
<b>7.6.2</b>	Chinese incentive travel	136

---

<b>Chapter 8</b>	<b>Republic of Korea</b>	<b>141</b>
------------------	--------------------------	------------

---

<b>8.1</b>	Republic of Korea SWOT snapshot	144
<b>8.2</b>	Market segment and profiles	144
<b>8.2.1</b>	Corporate incentive	144
<b>8.2.2</b>	Association congress	145
<b>8.2.3</b>	Exhibition	147
<b>8.3</b>	Many faces, same success	148
<b>8.4</b>	Fuelled by innovation	149
<b>8.5</b>	Converging global knowledge	150
<b>8.5.1</b>	HICO – Hwabaek International Convention Center, Gyeongju	150
<b>8.6</b>	Success stories	154
<b>8.6.1</b>	Rotary International Convention 2016, Seoul	154
<b>8.6.2</b>	World Water Forum 2015, Daegu and Gyeongbuk	155
<b>8.6.3</b>	IUCN World Conservation Congress 2012, Jeju	156

<b>Conclusion</b>	<b>159</b>
-------------------	------------

**Annex**

<b>International Congress and Convention Association (ICCA): Sub-region definitions</b>	<b>161</b>
---	------------

<b>Glossary of acronyms</b>	<b>165</b>
-----------------------------	------------

<b>List of figures, tables and cases studies</b>	<b>169</b>
--	------------

<b>References and bibliography</b>	<b>171</b>
------------------------------------	------------



---

## Acknowledgments

*Overview of the Meetings Industry in Asia* was conducted under the auspices of Mr. Xu Jing, Director, Regional Programme for Asia and the Pacific of the World Tourism Organization (UNWTO), ably supported by Mr. Omar Nawaz, Project Research Coordinator, Ms. Hyeon Jin Lee, Programme Assistant, and Ms. Harmony Lamm, Research Coordinator.

UNWTO would like to acknowledge its sincere thanks to GainingEdge and in particular to the report's lead author, Ms. Jane Vong Holmes.

UNWTO also wishes to express its deep appreciation to the Korean Tourism Organization (KTO) and to the Government of the Republic of Korea for the sponsorship of this study without which this publication would not have been possible.



---

## Foreword

### by the UNWTO Secretary-General

*Overview of the Meetings Industry in Asia* draws attention to the contribution of an important sector of tourism that includes corporate meetings, incentive travel, association congresses and conventions, trade fairs and exhibitions segments that, as the report rightly points out, “play a key role in strengthening a nation’s intellectual engagement, which in turn is fundamental to the development of knowledge and creative economies.”

Global tourism grew by 3.9% reaching an estimated total of 1.2 billion in 2016. Asia and the Pacific registered an increase of more than double the international arrivals with an exceptional 8.2% growth, accounting for 25% of the market with 303 million arrivals during the year. Tourism’s direct and indirect impact on trade, revenue, GDP and employment in Asia and the Pacific is therefore considerable in which the meetings industry has been playing a valuable role. According to *UNWTO Tourism Highlights 2016 Edition*, around 14% of all international tourists reported travelling for business and professional purposes.

Given the standing of Asia and the Pacific as an outbound and an inbound market, this report with its regional and country specific case study analysis highlights the present status, future potential and challenges and opportunities of the meetings industry which, I am sure, will interest not only those in the tourism sector of the region but also the global actors who have a stake in the lucrative meetings industry market in Asia and the Pacific.

I would like to take this opportunity to thank GainingEdge for their invaluable research in producing this study and to the Korean Tourism Organization (KTO) and the Government of the Republic of Korea for their generous support.

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

## Foreword

by Gary Grimmer, GainingEdge

We hope that the *Overview of the Meetings Industry in Asia* will be helpful to government policy makers, destination marketing organizations (DMOs), tourism stakeholders and even students who are doing coursework in preparation for careers in the business events industry. We think the report offers helpful insights into why this industry plays such an important role in the development of well-established, as well as emerging economies. The report also contains profiles of the different market segments and some key trends that are driving them. Throughout the report we have relied heavily on case studies to provide interesting insights into new innovations and approaches that are moulding and redefining this dynamic industry.

This is a report about Asian best practices that reveal what is happening in each part of the Asian market from both a business and a destination development perspective.

We finish with two special sections: the first one on China, the nation that is having such a remarkable impact on the integration between Asia and the rest of the world and which will undoubtedly provide both challenges and major opportunities to the other nations of Asia. Our second special section is on the Republic of Korea, a destination which has continued to impress meeting planners and organizers for its consistent and steady balance of culture and tradition with cutting-edge meetings infrastructure, technological wizardry and innovation. Republic of Korea's advancement in the meetings industry has been nothing short of spectacular and its success story provides inspiration for other destinations with similar aspirations and political will.

GainingEdge was honoured to have the opportunity to partner with the Korean Tourism Organization (KTO), the Government of the Republic of Korea and with UNWTO in the development of this report. We would like to especially recognize Jane Vong Holmes of our team in Kuala Lumpur who lead this effort and whose hard work, insights and leadership experience in the Asian business events industry made this report possible.

Gary Grimmer  
Chief Executive Officer,  
GainingEdge

---

## Executive summary

*Overview of the Meetings Industry in Asia* aims to provide useful information and case studies to governments and tourism stakeholders involved in the field of business events. The key trends and recommendations from the report are listed below.

### 1. Clarity of direction

Business events can have direct impact on tourism spending. There is a growing awareness in governments around the world that the business events industry is key to developing global trade and intellectual engagement, which in turn is fundamental to the development of knowledge and creative economies. Therefore, it is likely that national governments will become more actively engaged in strengthening their business events market development. It is important for countries seeking better business events outcomes to be clear on what they are actually trying to accomplish. Traditionally, the view was that business events were only a tourism market segment, a way of achieving higher levels of consumption of hospitality supply and the associated direct spending and induced impacts, like higher levels of employment and additional tax income. Achieving more tourism is certainly an outcome of building a business events industry. However, being clear about the goals of the effort can significantly alter a destination's approach.

If the goal is more visitors and more tourism outcomes, then a country should focus on *quantity* – mostly those events that have large numbers of delegates. If a country is more concerned with building global knowledge and creative networks, trade and foreign direct investment, then the focus would more logically be on *quality* – those events that would bring in investors, thought leaders, corporate leaders and distributors in any field that was a focus of that nation's sectorial development goals.

If a destination has a goal to increase trade and intellectual engagement in environmental industries then a world-leading renewable energy convention with only 500 attendees might be much more impactful in the long run than a 5,000 person Lions Clubs International convention. But, if the goal is filling hotel rooms, then a larger convention would be a better fit. In a way the logical approach is to do both, focus on quantity *and* quality, and in the process understanding clearly that some small groups can have a major economic development impact.

---

## 2. Significance of market trends

The changing marketplace and changing customer expectations are important for destinations to monitor. Examples of changing market trends include:

- **More for less:** business events are driven by issues of return on investment (ROI). They will go to the places that deliver high value – better delivery at a lower cost;
- **Meeting design:** event programmes are changing and unique venues are in more demand than ever;
- **Sustainability:** business events delegates and meeting planners are favouring destinations and venues that have sound sustainable practices;
- **New platform tourism services (the so-called sharing economy):** destinations are coming to grips with competitive services like Airbnb and Uber for two reasons. First, customers want it. Second, local suppliers are being disrupted by it and are looking for a level playing field; and
- **Meeting success:** business events are increasingly focused on measuring their meeting outcomes. Some of these can be influenced by a destination and others cannot. Successful destinations will focus on areas that organizers care about, such as the importance of the delegate's experience, the availability of Corporate Social Responsibility (CSR) programmes and a demonstration that the event will result in a good financial outcome.

## 3. Destination competitiveness

The report provides case studies from across the Asia and the Pacific region and how many countries in the region are realizing and therefore embracing the economically transformative nature of hosting business events.

There are currently over 40 new or expanded convention centres underway currently in the region. Many destinations in Asia and the Pacific are increasing their efforts to host business events, not just on conventions but also on incentives and exhibitions. Even countries that have traditionally not been “players” are addressed in the report as “New Generation Destinations” – Cambodia, Lao People's Democratic Republic, Myanmar and Viet Nam.

## 4. Importance of branding

Many Asian cities and countries have tourism brands. In most places, the greatest focus of brand extension is promoting the destination for tourism. Tourism branding is typically the most powerful form of city and nation branding.

A recent DestinationNext study commissioned by the Destination Marketing Association International found that branding was seen as the number one most important issue for destinations of the future.<sup>1</sup>

The world of branding has changed dramatically. Before the Internet, DMOs were “brand managers” because they essentially controlled most of the messaging which appeared in the

---

<sup>1</sup> Destination Marketing Association International (n.d.), 'A Road Map for the Future', Destination Marketing Association International (online), available at: [www.destinationmarketing.org/destinationnext](http://www.destinationmarketing.org/destinationnext) (10-12-2016).

marketplace about the destination. With the advent of the Internet, the notion of managing a brand is rapidly losing credence. The world of branding today is much more about *delivery* as opposed to *communicating* the brand promise.

The other key consideration is that tourism branding does not typically resonate with business events customers. These customers care much more about business issues, like how well the destination is structured, or if it is a centre of innovation, having international event service experience and the quality of supply that runs much broader and deeper than the normal tourism supply chain. As tourists would not respond to branding that talks about how scientifically innovative a place is, meeting planners will not respond to branding that talks about how nice a place is to visit.

Hence the need for destinations to create business events sub-brands. These compatible sub-brands can support and leverage the tourism brands. However, they need to speak effectively to a different audience. The key thing to remember is that logos and slogans do not make a brand. A brand is the destination's promise, its value proposition. Brand strategy first determines *what* the current brand is in the customer's minds and then decides on an appropriate *strategy*. As such, the entire community must be engaged, both tourism stakeholders and residents. Without this embrace and support for the brand promise the promise may not be kept and the intended brand becomes essentially meaningless.

## 5. China's role and influence

China has become the third largest exhibition market in the world after the United States of America and Germany. China is constructing new convention centres, new hotels and modern new transportation systems.

China has significant and unrealized market potential for up-market traffic. However, the following areas may require attention:

- **Convention bureaus:** China does not have fully fledged convention bureaus. Virtually every other Asian nation that is a major player in this market either has convention bureaus or is developing them, having realized that there is a demand. This may signify that cities that do have a convention bureau have a temporary market advantage over those that do not. An example is Hangzhou, which has risen to the third position in the ICCA convention rankings in China (after Beijing and Shanghai). While Hangzhou is lacking a full-service bureau, its tourism promotion board has a department that possesses significant bureau functionality and is energetically focused on business events development;
- **Convention facilities:** while Beijing, Shanghai and Guangzhou have developed modern convention facilities, many cities across the country may need to reassess their facility capabilities, consider renovations, expansions or new construction;
- **Difference of business practices:** the international business events industry typically operates on a business model which can be significantly different in many ways to China's cultural business practices and governmental issues;
- **Leveraging China's market:** global associations are seeking engagement in China because of its large market and the fast paced growth and innovation in areas like medicine and engineering. Corporate meetings and incentives that have limited experience in Asia are travelling long distances to be in China.

China is opening new doors of opportunity for all of Asia. Once these events and customers have experienced China, then some of these events might be enticed to other Asian destinations as well. In a sense, what is good for China may in many instances be good for the region; and

- **China's outbound market:** the Chinese outbound market has been growing rapidly. Business events that come to other parts of Asia want to attract Chinese delegates. Traditionally, the focus has been on delegate recruitment within China – attracting Chinese delegates to conventions and exhibitions in other parts of Asia and the world. However, there may be a growing opportunity, for Asian destinations in particular, to attract Chinese based business events to other countries.

## 6. Building the right convention centre

The report has a separate section on convention centres and changing customer facility needs. It speaks to issues that should be addressed in the design of new facilities, for instance new technology, green systems, multiple-event circulation and separation and flexible meeting spaces.

There have been many instances around the world where convention and exhibition centres have been built without adequate attention to customer wants and needs, which affects marketability, utilization and ultimately financial performance. The right facility is fundamental to the prospects of success.

There are new facilities springing up all over Asia, and some will be successful while others are not. There is a challenging competitive environment and the competition will only become greater. Having the right facility is fundamental to the prospects of success.

Recommended approaches to consider when constructing new facilities:

- **Feasibility study:** a feasibility study can address issues like market demand analysis, facility scoping, site review, utilization projections, financial forecasts and the design brief. The key point of a feasibility study is to build an optimum sized facility and to have a realistic anticipation of operating outcomes;
- **Design review:** the goal of a design review is to ensure that the design meets the brief and that the building has a high degree of functionality;
- **Construction monitoring:** well-managed construction monitoring will ensure that there is a high quality build. This can often reap significant benefits in terms of reduced “unscheduled maintenance” costs;
- **Management approach:** there are options on how to manage and operate a facility, including in-house or contracted professional management and, in the latter case, different negotiated financial and operational arrangements. Different approaches work better for different buildings in different situations; and
- **Pre-opening marketing programme:** a common mistake is that some convention centres are not properly marketed well in advance of opening. In those instances the utilization factors can be very low in the early years, and financial performance can be adversely affected. The best practice approach is to have a professional sales team in place and securing events even before the centre is ready for operation.



---

In summary, taking the steps above will help a destination to build the right-sized facility, with better functionality, of higher quality, with lower maintenance costs, that is better managed and is achieving superior operating outcomes.

## **7. Convention bureau establishment**

The report discusses the current proliferation of convention bureaus around Asia. Traditionally, Asia had relatively few bureaus and, with the exception of the Republic of Korea and Japan, those few that existed were national. Now virtually every advanced nation in Asia is either forming a new national bureau or considering doing so. In addition, city bureaus are beginning to appear in Malaysia and are being planned for in Thailand. It is likely that city bureaus will continue to proliferate as more and more destinations seek to build their business events industries. One of the key reasons that convention bureaus are essential for success is that the customers demand them. Customers want to work with organized supplier communities that work together, and the bureau is the organization that they work through. Bureaus have many other key functions which include organizing bids for business events, developing the destination brand strategy, managing marketing communications, liaising between customers and suppliers, event services, product development and industry capacity building. Without ongoing effort in all of these areas, no destination can be optimally successful.

## **8. Corporate meetings as part of the business mix**

One of the common perceptions is that bureaus and destinations should focus efforts on attracting more corporate meetings. However, it is important to note that a vast majority of corporate meetings are not destination focused. Most corporate meetings will decide where to meet based on where they have large communities of buyers or suppliers, or where they already have corporate installations.

Convention bureaus and destinations can add value when a large corporate meeting is looking for a destination for a regional or global meeting. Meeting planners can choose a destination that they feel will provide a convenient staging area and high quality of services. However, for these types of events, hotel corporations may already be targeting them and the decision makers are constantly changing.

## **9. Accessibility to international conventions**

Accessibility to a convention requires that visas for delegates and organizers are processed efficiently and that there are not high custom duties. Many destinations have put in place fast track visa clearance for convention delegates, dedicated fast-track lines at passport control and special customs arrangements for exhibitors.

---

## 10. Planning a strategic subvention approach

Subvention is when a destination offers a special subsidy to an event if it chooses that destination as its meeting place. It can take the form of cash incentives, sponsored activities, certain numbers of hosted hotel rooms, hosted meal functions and/or venue rental discounts. Destinations have begun developing programmes and offering inducements that they have created a “buyers’ market.”

However, for the most part events do not approach subvention in a mercenary way. Event organizers do not make a decision on a destination not only about which destination offers more subsidies. Rather, their budgeted financial outcomes are imperative. For this reason, this report recommends that destinations to have strategic subvention strategies. Entering into subvention bidding contests is not strategic. Providing only the minimum amount of subvention necessary to win the bid is strategic, and even more so if it is tied to positive outcomes.

A good subvention strategy will include the following:

- A dedicated fund that can grow over time and be managed appropriately;
- An objective system for evaluating the relative value or importance of the proposed event to determine how much a given event should be offered. The levels of offer would be aligned with the long-term financial management strategy for the fund;
- Clear policies governing the use of funds;
- Clear performance expectations on the event itself, for example what is expected of the group in terms of things like numbers of delegates, event measurement reports, community engagement, endorsements, etc.;
- Provisions by which funds will not ultimately be provided if agreed outcomes are not achieved; and
- Ongoing return on investment measurement on use of funds.

---

## Chapter 1

# An introduction to the meetings industry

### Summary

The chapter introduces the meetings industry. The meetings industry is a global industry which comprises four segments of business-related travel which is quite distinct from leisure-travel. The meetings industry through the business events it hosts is today acknowledged as a driver in the destination's transformation through its connective and enabling roles, aligning the interests of government and the professional community and a catalyst for trade, investment and knowledge creation. These dividends extend beyond tourism-related industries while creating additional demands for the hospitality industry. The business events market is different from the leisure market and recognizing these core differences will set the right foundation for successful destination marketing.

### Key words

- Meetings industry;
- Benefits beyond tourism;
- Differences between meetings and tourism; and
- Meetings industry branding.

### Key messages

- The meetings industry also generates expenditure on non-tourism related items affecting a broader and deeper supply chain;
- Beyond economic benefits, the meetings industry leaves legacies that include outcomes such as knowledge expansion, global networking, trade relationships, research collaboration, foreign direct investment (FDI), reputation enhancement and nation branding; and
- Three case studies which illustrate benefits beyond tourism and federal governments' efforts to support the meetings industry growth in their countries.

According to the *UNWTO Tourism Highlights 2016 Edition*, tourism is a major category in international trade in services. In addition to receipts earned in destinations, international tourism also generated USD 211 billion in exports through international passenger transport services rendered to non-residents in 2015, bringing the total value of tourism exports up to USD 1.5 trillion, or USD 4 billion a day on average. It is clear that tourism brings sea changes through the creation of jobs and enterprises, export revenues and infrastructure development. In 2015, 1,186 million international tourist arrivals were recorded in 2015, of which 14% reported travelling for business purposes.<sup>1</sup>

In 2006, UNWTO in collaboration with the International Congress and Convention Association (ICCA), Meeting Professionals International (MPI), and Reed Travel Exhibitions, launched an agreed methodology for measuring the direct impact and value of the meetings industry that complied with Tourism Satellite Accounting (TSA) standards. Referred to as the "MICE TSA" it showed that the meetings industry can have a large impact on hotel room nights, dining and retail, airfares and ground transportation. In addition, meetings, conventions and exhibitions

---

1 World Tourism Organization (2016b), *UNWTO Tourism Highlights, 2016 Edition*, UNWTO, Madrid, p. 4.

also generate expenditure on non-tourism related items affecting a broader and deeper supply chain including things like AV hire, exhibition stand contractors, production services and floral arrangement decorators.

In this report, the term “meetings industry” will be used to refer to the corporate meetings, incentive travel, association congresses and conventions, trade fairs and exhibitions segments. An interchangeable term is ‘business events’ which has been already adopted by several destinations in the world.

Business Events Sydney’s *Beyond Tourism Benefits* report show that the meetings industry brings many other benefits beyond dollars and cents.<sup>2</sup> In addition to social legacies, innovative ideas and knowledge sharing, business events can also encourage more tourism activity, for example, the delegates are prone to revisit for leisure purposes with friends and family. Accompanying persons to business delegates also do their part for the local economy, and when pre or post congress/exhibition touring takes place, the tourism effects are dispersed to the environs and regionally. Other economic spin-offs include employment and taxation revenue. As such, although often regarded as a subset of tourism, the meetings industry has an important place in the national GDP and is a catalyst of change in several ways.

## 1.1 Benefits beyond tourism

The direct spend and high per-capita value of business events have been long established, but a new generation of leaders have also begun to examine the implications of a strong and vibrant meetings industry to the overall transformation of their destination.

The significant benefits ‘beyond tourism’ clearly indicated that the meetings industry contribute to the economy in the short term, and in the long term, they leave legacies that are broad reaching and potentially far more valuable. These benefits, which extend beyond the tourism and non-tourism spend, include outcomes such as knowledge expansion, global networking, trade relationships, research collaboration, foreign direct investment (FDI), reputation enhancement and nation branding.<sup>3</sup>

As such, the benefits of the meetings industry goes beyond the traditional measurements of the financial impact of such an event by way of delegate spend, room nights, transports costs, retail, food and beverage, and other related expenses. While these are still critical measures of success, the goals and outputs of the meetings industry are wide reaching.

Governments have priority sectors for development that conventions can help strengthen by bringing global industry leaders to engage with local professional communities. Hosting an international convention in the field of renewal energy, as an example, means the convergence between the world’s leading experts who come bearing global knowledge, expertise and best practices in green energy. Through networking at such a convention, local delegates acquire new

2 Manolis (2011), ‘Business events offer more to destinations than tourism dollars alone’, *Toposophy*, 17-10-2011 (online), available at: [www.abouttourism.wordpress.com](http://www.abouttourism.wordpress.com) (08-12-2016).

3 Future Convention Cities Initiative (FCCI) (2014), *Beyond Tourism Benefits: Building an International Profile* (online), available at: [www.fccinitiative.org](http://www.fccinitiative.org) (08-12-2016).

knowledge and global perspectives which is then incorporated into local education resulting in a higher quality of know-how. Similarly, new contacts from this convention can result in research collaborations and in turn generate innovation and ideas. At the same time, international delegates are also exposed to the local knowledge, research and capacity. Through technical tours to local sites and facilities, the host destination has the opportunity to showcase its best and brightest facilities which will lead to investment and trade, supporting the greater overall economic development.

### 1.1.1 Case study: International AIDS Conference 2004 – Bringing change and progress

“Our conferences have always been more than just meetings. The momentum from the 1996 conference in Vancouver led to the first 75,000 people starting triple drug therapy within one week of that meeting. AIDS 2012 was fundamental to ending the United States’ 22-year restriction on travel for people living with HIV. AIDS 2014 helped end the last remaining HIV-specific criminalization law in Australia.”<sup>4</sup>

Owen Ryan, Executive Director of International AIDS Society – IAS

In 1985, the first international conference on AIDS, organized by the International AIDS Society, took place in Atlanta, United States of America. Back then, it was a modest sized meeting of scientists and researchers, but today this scientific meeting has evolved into multi-track, week-long convention that attracts around 20,000 delegates. Heads of states, celebrities, activists, doctors and people living with HIV and AIDS rub shoulders with scientists, researchers, pharmaceutical companies and clinicians. This biennial International AIDS Conference serves many purposes, starting from research, treatment, care and prevention to leadership and policy development; and from sharing of issues and solutions to advocacy on common stands. It has offered the opportunity to showcase domestic and international achievements related to HIV/AIDS research and programme implementation and highlighting to the international community the long-term impact of international collaboration to the global AIDS agenda.

The city of Bangkok, Thailand, hosted the 15th International AIDS Conference in 2004. The choice of Thailand as the venue for the conference is the result of a decision taken at the Durban Conference in the year 2000 to rotate the conference between developed and developing countries. Taking the conference to South-East Asia also acknowledged the effectiveness of Thailand’s prevention interventions in the early 1990s, as well as the Government’s commitment for scaling up access to treatment and care and to accelerating HIV research. Often touted as a success story, Thailand tackled its massive AIDS epidemic in the 1990s, cutting the estimated number of people infected each year to 8,100 in 2013 from 143,000 in 1991.<sup>5</sup>

For the first time, the conference was physically accessible to non-delegates through the Global Village. Well over 20,000 people<sup>6</sup> visited the Global Village during the week of the conference,

4 Ryan, O. (2015), ‘Letter from the Executive Director’, blog, 18-07-2015, International AIDS Society (online), available at: [www.iasociety.org](http://www.iasociety.org) (08-12-2016).

5 Tang, A. (2015), ‘Thailand could stop thousands of HIV deaths with more tests and treatment: experts’, Reuters (online), available at: [www.reuters.com](http://www.reuters.com) (08-12-2016).

6 International AIDS Society – IAS (2004), *Report on the XV International AIDS Conference Bangkok, Thailand, 11–16 July 2004* (online), available at: [www.iasociety.org](http://www.iasociety.org) (08-12-2016).

at least 13,000 of them members of the Thai public. Delegates were able to interact with their local counterparts to share experiences, solidarity and compassion, discuss ideas, pass on perspectives and establish new networks for learning. An important objective of the conference was to serve as a catalyst to shape perceptions around HIV/AIDS not only internationally but also locally in Thailand and in the surrounding region.

An Advocacy Parade of over 3,000 people walked through downtown Bangkok and culminated in a ceremony to honour those who have died of AIDS and installed a stone monument in their memory in a park. In the context of denial about HIV and the stigma and discrimination still faced by those affected, this is a very significant and hopeful achievement.

The Bangkok Conference also led to new networks for shared learning and collaborative campaigning. New initiatives were born: a new Working Group on Human Rights and HIV and a new network of NGOs and communities working with and for children infected and affected by HIV, and in the Greater Mekong Subregion (GMS), a new PLWA (People Living With AIDS) network. Empowered, the Thai NGO serving sex workers, perceived a significant and positive shift in Thai public opinion towards sex workers as a result of their activities around this AIDS conference.

Several politicians timed high profile commitments to announce during the week of the conference: in China, then Premier Wen Jiabao issued a statement to the world media about China's new commitment to AIDS; in the United Kingdom, former Prime Minister Tony Blair committed GBP 1.5 billion to the Global Fund to fight HIV/AIDS while the Thai Prime Minister at that time, Thaksin Shinawatra, announced Thailand's commitment to universal treatment. There were also pledges of major contributions to the Global Fund from the Gates Foundation and the European Commission.

The conference catered to a diverse range of stakeholders and the Network of African People Living with HIV/AIDS (NAP+) and the Asia Pacific Network of People Living with HIV/AIDS (APN+) took the opportunity to celebrate their tenth anniversary. Even individual delegates took away new insights: a delegate from the Red Cross Caribbean AIDS Network commented that the conference gave her a new appreciation of the value of AIDS programmes in her region and felt that she should be sharing her knowledge with others in future conferences.

## 1.2 Differences between the meetings industry and tourism

In economic development evaluation, there is a critical distinction between Meetings and Tourism. Both generate significant volumes of direct spending, particularly on the consumption of hospitality product. These increased export earnings stimulate the economy which results in additional employment and tax revenues, especially from within the tourism industry. In 2015, international tourism receipts earned by destinations worldwide stood at USD 1,260 billion.<sup>7</sup>

While the meetings industry is often regarded as a tourism market segment delivering only tourism related benefits, many governments are beginning to focus more attention on the "beyond tourism benefits" that meetings, conventions and exhibitions deliver.

---

<sup>7</sup> World Tourism Organization (2016b).

The meetings industry in most countries accounts for approximately 10–20% of the economic impacts derived from visitor spending. However, a strong meetings industry will produce broader transformative economic impacts that go well beyond the hospitality industry. Meetings play a key role in strengthening a nation's global trade and intellectual engagement which in turn helps to drive development of its knowledge and creative economy.

Recognizing and adopting this new appreciation, governments around the world have encouraged public and private investment, supported policy development and are planning for growth in the meetings industry. Destination marketing organizations (DMOs) and convention bureaus are planning targeted sales and marketing strategies which include educating and motivating their own national associations and local bodies on the benefits and opportunities from hosting international events. Corporations that exhibit or sponsor business events continue to do so because they are motivated by various outcomes including networking with key industry figures; gaining product exposure; increasing recognition as a contributor to the community; obtaining leads for future business; improving brand awareness; reaching an identified target market; contributing to the development of the sector; and increasing both domestic and export sales.

Although an important consideration, promoting leisure benefits are not the best way to promote a destination for business. Leisure travel (tourism) and business events (meetings) customers are fundamentally different.

The table below illustrates the differences from five key aspects:

1. Purpose of visit;
2. Main drivers/motivation;
3. Decision makers or target audience;
4. Service providers/suppliers; and
5. Marketing approach.

To be successful, it is important to understand that business events development is a unique challenge and one that will not be fully accomplished through the same approaches used for tourism.

Table 1.1 Differences between the meetings industry and tourism

	Leisure tourism	Business events
<b>Purpose of visit</b>	<ul style="list-style-type: none"> <li>– Fun and leisure; and</li> <li>– Exploring new destination and learning new cultures.</li> </ul>	<ul style="list-style-type: none"> <li>– Business networking and information sharing;</li> <li>– Education and certification; and</li> <li>– Business networking.</li> </ul>
<b>Main drivers/motivation</b>	<ul style="list-style-type: none"> <li>– Affordability;</li> <li>– Uniqueness of destination and culture; and</li> <li>– Kind of leisure activities available.</li> </ul>	<ul style="list-style-type: none"> <li>– State of domestic economy;</li> <li>– Quality of MICE-related infrastructure, such as convention/meeting venues and hotels; and</li> <li>– Affordability and connectivity.</li> </ul>

	Leisure tourism	Business events
<b>Decision makers</b>	<ul style="list-style-type: none"> <li>– Individual tourists;</li> <li>– Tour wholesalers; and</li> <li>– Travel agents.</li> </ul>	<ul style="list-style-type: none"> <li>– Meeting planners/AMC;</li> <li>– Professional congress/exhibition organizers; and</li> <li>– Association and corporations.</li> </ul>
<b>Service providers/suppliers</b>	<ul style="list-style-type: none"> <li>– Tour operators/travel agents;</li> <li>– Hotels; and</li> <li>– Airlines.</li> </ul>	<ul style="list-style-type: none"> <li>– PCO/DMC/EMC;</li> <li>– Venue providers (meeting venues and exhibition grounds); and</li> <li>– Convention centres.</li> </ul>
<b>Marketing approach</b>	<ul style="list-style-type: none"> <li>– Broadcast marketing to end consumers (tourists); and</li> <li>– Tour packages through tour operators/travel agents.</li> </ul>	<ul style="list-style-type: none"> <li>– Bidding for international conventions/exhibitions;</li> <li>– Lobbying with government and trade bodies; and</li> <li>– Direct selling to corporations and associations.</li> </ul>

Notes: AMC: association management company.  
 EMC: exhibition management company.  
 DMC: destination management company.  
 PCO: professional congress organizer.

In terms of market approach, it is important to understand that leisure tourism promotion is very strategic, for example, the common approach is broad market stimulation through marketing and advertising. The meetings industry on the other hand is more tactical – direct sales activities and forming relationships with specific decision makers. Stated simply, leisure promotion is B2C while business events promotion is B2B.

### 1.2.1 Case study: the role of Australian Government agencies

In 2014, Australia's meetings industry received a major boost when the Federal Government entered into a partnership to assist the meetings industry during the bidding and event delivery process. This is a strategic collaboration between the Federal Government – through Austrade and Tourism Australia – and Association of Australian Convention Bureaux (AACB), as well as the meetings sector. Under the new framework, Austrade will coordinate ministerial support for an event and will organize onshore and offshore promotion, while Tourism Australia will partner with industry to provide marketing and promotional materials.

Andrew Robb, former Minister of Trade and Investment explained:

“This new framework demonstrates the common sense approach this Government has taken to the tourism portfolio, by moving it under the trade umbrella; allowing closer alignment between the work done by Austrade – our export promotion agency – and Tourism Australia. The high-yield economic benefits of hosting business events – not just for the tourism sector but for the wider community – are key contributors to the Government's economic diplomacy agenda, and are highly effective vehicles for driving



industry growth, which is in keeping with the Government's trade and investment priority areas."<sup>8</sup>

Under this new framework Australian convention bureaux will serve as the first point of contact for event organizers – and the broader meetings and conventions sector – who are seeking Austrade and Tourism Australia support. As reported by the Association of Australian Convention Bureaux, Australia has secured 360 future international business events up to September 2023, attracting more than 190,000 international delegates. One in four business events is in the health sector. More than half of the international meetings and conventions are known to have a dedicated trade component.<sup>9</sup>

### 1.2.2 Case study: the meetings industry in the United Kingdom

The national tourism board VisitBritain has launched a programme designed to attract more global meetings to the United Kingdom. The four-year Event Support Programme will offer advocacy and funding to grow and develop the United Kingdom's international meetings industry, is currently worth USD 25 million to the economy.<sup>10</sup>

The new programme is open to destination management organizations (DMOs) or venues and event organizers who are collaborating with DMOs, and offers them the chance to apply for funding support. Organizations can also apply for non-financial support in the form of endorsements from government ministers, overseas diplomatic missions, UK Trade & Investment and other influencers. These can include letters of support or video messages from government and non-government influencers, attendance at a bid support activity by a minister or hosting meetings to help secure events for Britain.

The Fund can disburse GBP 1 million a year for the duration of four years and can improve activities that help secure meetings for Britain, develop new events or boost the economic impact of existing events.<sup>11</sup>

In a similar vein, a specialist destination marketing agency Leopold Marketing has been awarded funding from the GBP 40 million Discover England Fund. Targeting the incentive travel market from China, North America and the Middle East, this agency will develop incentive itineraries, coach English tourism business on how to service the sector and engage with DMCs based in the United Kingdom while targeting incentive houses overseas to raise awareness and encourage bookings.

8 Australian Minister for Trade and Investment Archives (2014), 'Australia open for business events', press release, 28-11-2014, Australian Minister for Trade and Investment Archives (online), available at: [www.trademinister.gov.au/releases](http://www.trademinister.gov.au/releases) (08-12-2016).

9 Meetpie (2016a), 'Australia has 157 international meetings in bid pipeline' (online), available at: [www.meetpie.com](http://www.meetpie.com) (08-12-2016).

10 VisitBritain (n.d), 'VisitBritain has launched a programme to attract more global business events to the UK' (online), available at: [www.visitbritain.org](http://www.visitbritain.org) (08-12-2016).

11 Ibid.

## 1.3 Meetings industry branding

There are still many destinations that operate with branding primarily designed for leisure promotion which can create challenges for convention bureaus trying to attract meetings and conventions. A destination's strong tourism brand can be a double-edged sword as the meetings industry focuses on 'doing business'.

An example is in the medical and healthcare industry. This industry is the most dynamic in terms of organizing conventions, symposiums and workshops, and the target of most destinations. At the same time, a plethora of regulations have been passed with the aim to keep the industry transparent. Healthcare practitioners are discouraged from attending meetings in resorts and holiday destinations. A convention is not the vehicle for health care practitioners to go on "holidays" at public or corporate expense. As a result, affected meeting organizers tend to avoid such holiday destinations.

### 1.3.1 Case study: the meetings industry in Monaco

The meetings industry in Monaco lost market share after the 2008–2009 financial crisis. Some companies cancelled or postponed their events to cheaper destinations or have intentionally avoided the Principality because of its luxurious image. For decades, "the Principality of Monaco has arguably been the most exclusive and glamorous destination in the world".<sup>12</sup> It was known as a "land of super yachts, super casinos and super rich"<sup>13</sup> where celebrities and royalty mingle during the Formula 1 Grand Prix or during a charity ball. Since the global economic crisis, many event planners and corporate CEOs have removed all destinations with a luxurious or "resort" image, including Monaco. The Monaco Convention Bureau had to fight a problem of perception that has proved more difficult to overcome than the problem of price.

In 2011, Monaco benefited from the exposure of the wedding of Prince Albert II with Charlene Wittstock. Tourism to Monaco was renewed with the image which made it successful, based on princes and princesses, and the glamour and beauty of the destination but the meetings segment still struggled to recover, plagued by its luxurious holiday label. There is, however, a happy ending to this case study. To develop the meetings segment in the Principality, while endeavouring to change the perception that it is the land of billionaires where no one works, the Monaco Convention Bureau launched a campaign where the bureau deliberately played with the biggest *clichés* of the destination such as casino, Formula 1 and golf. They then used the strengths of Monaco while highlighting the skills and expertise developed in each of the targeted areas of activity. This strategic repositioning and perception changing campaign changed Monaco's luxurious and exclusive reputation among its meetings stakeholders and earned the bureau the coveted ICCA Best Marketing Award in 2014.

12 Oates, G. (2012), 'Monaco: A Destination to go Beyond Yourself', *prevue*, 14-11-2012 (online), available at: [www.prevuemeetings.com](http://www.prevuemeetings.com) (08-12-2016).

13 McKenzie, S. (2012) 'Monaco: Land of super yachts, super casinos and super rich', *CNN*, 03-09-2012 (online), available at: [www.edition.cnn.com](http://www.edition.cnn.com) (08-12-2016).

## Chapter 2

# The meetings industry: market segments and profiles

### Summary

The meetings industry comprises four segments – (1) corporate meeting, (2) incentive travel, (3) association congress and (4) exhibition – all different segments of business events with different characteristics, different target groups, different needs and requiring different strategies and approaches. In this chapter, there is an introduction to various business events segments and three trends influencing each segment are identified.

### Key words

- Corporate meeting;
- Incentive Travel;
- Association Congress;
- Exhibition; and
- Trends.

### Key message

- The meetings industry is known by various monikers “MICE”; “the meetings industry”; the “conventions industry”; “business tourism”, “MICE Tourism” or “business events”;
- The industry comprises four main business segments – corporate meetings, incentive travel meetings, association congresses and exhibitions;
- Internal corporate meetings are more organizationally focussed or “company facing”. External corporate meetings are more business focussed or “market facing”;
- Incentive trips are used to motivate and increase sales and to recognize employees;
- Association congresses are considered the primary means by which advances and new ideas in healthcare, science, technology and a myriad of other disciplines take place; and
- Exhibitions are commercial undertakings and staging decisions are influenced by the strength of markets, population and GDP.

The meetings industry aligns the interests of several stakeholders such as the government, professional community, destination marketing organizations (DMOs) and supports the hospitality industry. It is now viewed as part of a comprehensive government strategy for economic transformation and growth in priority sectors. Today, the meetings industry is recognized as a key driver of a destination’s economic development strategy and central to the continuing development of knowledge and creative economies and increasing the competitive advantage of national economies. The hospitality industry is an enabler for broader economic transformation through business events and as such, the growth of this industry is an additional benefit rather than the primary goal of growing meetings activity.

According to the Global Business Travel Association (GBTA), China has exceeded the United States of America in total business travel spend this year while India is expected to have the greatest increases in business travel spend globally in 2016. In light of the economic slowdown

in 2016, GBTA predicts a 12% growth in total business travel spend in 2016, a decrease from the 14.2% experienced in 2015.<sup>1</sup>

The meetings industry is known by various monikers, in some parts of the world and in Asia especially, “MICE” (Meetings, Incentive, Convention and Exhibitions) is normally used; in Europe the industry is referred to as “the meetings industry”; in the United States of America it is referred to as the “conventions industry” yet others refer to it as “business tourism” or “MICE tourism”. Whichever terminology is used, the industry comprises four main business segments – corporate meetings, incentive travel meetings, association congresses and exhibitions.

## 2.1 Corporate meetings

More corporate in-region research and development (R&D) is now conducted in Asia (35%) than in North America (33%) and Europe (28%), which is a change from 2007, when Europe was the top region for R&D spending and Asia was third. The most important advantages of moving R&D functions to Asia, specifically China, are proximity to a high-growth market, proximity to key manufacturing sites, proximity to key suppliers and lower development costs.<sup>2</sup>

Companies generally hold corporate meetings in a given destination for the following reasons:

- The company has a headquarters in the city;
- The company has a major installation in the city;
- The city is home to a significant number of buyers of the company’s products;
- The city is home to key suppliers to the company; and
- The company has some other major commercial interest in the city.

This segment includes a wide range of different types of meetings:

- Internal meetings:
  - Annual General Meetings (AGMs);
  - Planning;
  - Executive retreats;
  - Team building;
  - Sales and management; and
  - Training courses.
- External meetings:
  - Supply chain relationship management;
  - Customer relationship management;
  - User groups; and
  - Product launches.

Internal corporate meetings are more organizationally focused or “company facing”. The internal meetings tend to relate to managing the company’s value chain which include activities such

1 Global Business Travel Association Foundation (2016b), ‘Global Business Travel Spend Topped Record-Breaking \$1.2 Trillion USD in 2015, Will Reach \$1.6 Trillion by 2020’, press release, 11-07-2016, *Global Business Travel Association Foundation* (online), available at: [www.gbta.org/foundation](http://www.gbta.org/foundation) (08-12-2016)

2 Jaruzelski, B. et al. (2015), *The 2015 Global Innovation 1000: Innovation’s new world order* (online), available at: [www.strategyand.pwc.com](http://www.strategyand.pwc.com) (08-12-2016).

as operations, logistics, sales and marketing, and services. These internal corporate meetings will almost always be held near where the participants are located, such as near corporate headquarters or an office and thus have little to do with destination selling. In instances where a corporation wants to hold a regional meeting with participants from various geographic locations, it may be choosing a destination, but again usually one where it already has a significant presence.

External corporate meetings are more business focused or “market facing”. They are about managing supply chain relationships or developing customers. For instance, a raw materials company might have a meeting in a location where it has customers which use its raw materials for manufacturing. A manufacturing company might have a meeting in a place where it tends to get raw materials as part of its supply chain management activities, or it might have a meeting in a place where assemblers are customers of the components that the manufacturer produces. Distributors might supply chain manage their relationships in places where they sourced their assembled products or they might have meetings in markets where they have large numbers of end users.

There is one kind of external corporate meeting that can be a destination sell: demand focussed meetings that are seeking to engage an audience from a wide geographic area. These are essentially “market promotional meetings” of companies which seek to engage potential customers from around the region. These could be user group meetings or product launches. In these instances, the company is more destination focussed, but, with an emphasis on choosing a destination which will meet the company’s goals – attracting large numbers of potential customers to a meeting.

Due to plunging oil prices, the energy sector has suffered heavier travel cutbacks more than other industries. However, instead of travelling less, companies can travel smarter and better on the same budget by applying simple rules like advanced booking, allowing more restrictive fares, using low cost carriers for short trips or changing the hotel tier. According to *The Evolution of Travel Policy: A Global View on the Future* study in 2015 by the Association of Corporate Travel Executives (ACTE) and American Express Global Business Travel (GBT), corporations are planning to achieve savings by targeting traveller behaviour, and less through supplier cost reductions. “While savings remain a key driver, profitability is the objective of business travel”, explained Greeley Koch, ACTE executive director, in the report.<sup>3</sup>

## 2.1.1 Corporate meeting trends

### Smart corporate traveller profiles

Technological developments have allowed customised purchases based on preferences and data which is then stored in profiles for personalised services. These are becoming more commonplace and thanks to advances in mobile technology, this means that data can be captured at every touch point of a business traveller’s journey. Ultimately, business travellers, just like the leisure traveller, can have ‘personalised experiences’.

3 American Express Global Business Travel (2015), ‘Managed Travel at a Turning Point: Corporate Travel Managers to Focus on Compliance and Employee Experience to Drive Wider Business Objectives’, press release, 15-10-2015, American Express Global Business Travel (online), available at: [www.amexglobalbusinessstrave.com](http://www.amexglobalbusinessstrave.com) (08-12-2016).

## Safety and security

Now more than ever, duty of care is a crucial responsibility for a corporation. Business travel continues to expand globally and the accompanying risks to both employees and operations have greatly increased. To comply with their duty of care obligations, companies must place emphasis on risk management and mitigation. An organization should implement a methodical, planned approach to travel risk management.

## “Bleisure” travel and changing policies

Combining a business trip with leisure travel and bringing family on business trips has become more acceptable as employers realize that this will help with employee retention and be appealing to younger recruits.

## 2.2 Incentive travel

Many companies offer incentive programmes for their employees, distributors or customers. The programme usually represents a reward for levels of sales or productivity achieved.<sup>4</sup> The key is to offer some form of reward as a means to motivate employees, agents and customers. Incentive travel programmes can play a critical role in boosting the bottom lines of such companies. Many companies offer travel incentives with one-of-a-kind events, incorporating elements such as locally authentic cuisine and entertainment that reflects the culture and the feel of the destination. By incorporating the exoticness of the location, the participants will receive unforgettable experiences.

While incentive trips are traditionally used to motivate and increase sales, they are also being used to recognize employees. In an increasingly competitive landscape, these programmes are also being used to attract and retain talent. An incentive travel programme is an important opportunity to recognize the best of the best, to educate team members on company direction, to build a community and to appropriately award not only the winners but the spouses or other important people supporting their efforts. These events are in some instances mostly recreational, but, in recent years, increasingly, they include a formal meeting component. This is because having a meeting may provide corporate tax benefits and offer additional value in terms of networking, communication, education and team building.

Today's incentive travel participants seek new, unique experiences that connect them to a destination. This means that incentive planners have to design programmes that appeal to the varying interests of the multigenerational participants. Leisure time and time on one's own to pursue individual likes is growing in popularity. It is important to provide an experience participants cannot replicate, as well as to ensure that the experience merits the effort taken to be on the trip. Incentive programme qualifiers are well travelled and as such, the destination must present its best sides and constantly surprise and delight the participants. A typical tour or sightseeing

4 Society for Incentive Travel Excellence Foundation (2014), *Incentives Move Business: An Untouched Opportunity for Incentive Travel Providers – A White Paper from the SITE Foundation*, SITE (online), available at: [www.siteglobal.com](http://www.siteglobal.com) (08-12-2016).

programme is not sufficient for incentive winners. They need a unique experience that is befitting of achievers, something that they will not be able to experience on their own individual efforts.

As incentive programmes become more successful, finding destinations that are a draw, are of high quality and can accommodate growing numbers is critical. Recent global disruptions and economic challenges are likely to have an impact on destination selection, potentially driving demand for domestic or near-haul destinations even higher. Incentive travel planners must be prepared to address client concerns and are likely to be asked increasingly for contingency and emergency plans.

In addition, social technology is a big part of incentive programmes. Participants create shareable moments through social walls, unique hashtags and photo sharing opportunities. Social media is a great way to entice and engage participants especially those who are not at the event, but aspire to earn the trip the following year. Mobile apps are now expected at events as they keep participants engaged during the trip by identifying and recognizing top performers while also informing participants with event details and scheduling updates.

## 2.2.1 Incentive travel trends

### Corporate and social responsibility (CSR)

CSR remains popular with incentive groups. Corporations use incentive events for marketing and for achieving good public relations within and outside the organization. Increasingly, this is a core expectation with staff expecting their employers to be good corporate citizens. Some companies will take into consideration the green practices of destination hotels and vendors. A Guinness World Record was set when 6,400 participants of the Tiens incentive group cleaned up a beach in Nice, France within two hours.

### Do more with the same

As creative standards become higher, incentive suppliers cannot afford to remain complacent about creating value and unique, once-in-a-lifetime experiences through innovative offerings. Having a good destination management company (DMC) is crucial – the local DMC must be capable of guaranteeing event quality and client satisfaction through their in-depth local knowledge, creativity, expertise and networks.

### All-inclusive and healthy

There is an increasing trend opting for all-in-one venues because of the need for value, service and accessibility with wellness becoming top-of-mind for many participants. Wellness offerings like yoga, tai chi and healthier menus plus state-of-the-art fitness centres have a following these days. An all-inclusive option – think integrated resorts and cruise ships – simplify meetings and incentives from a strategic and budgetary standpoint as they include everything from accommodation to meals, from transfers to meeting rooms. Participants need not dig into their own pockets and the corporation knows exactly what the programme will cost. A resort can also provide a greater range of activities and options for organizers and attendees.



### 2.2.2 Case study: “A Journey to Remember”

Tetra Pak is in the food packaging industry, and Tetra Pak Pakistan is a subsidiary in this global company. In 2006, Tetra Pak Pakistan won the much coveted Internal Market Company of the Year, beating companies across 146 countries. This award is considered an once-in-a-lifetime achievement and Tetra Pak wanted an incentive programme that would build a unique teambuilding experience and create bonds among the employees. Unlike most incentives which involved only one segment of employees or the leaders of an organization, this group consisted of each and every employee of Tetra Pak Pakistan.

The local DMC immediately set out to work on the largest roadblock – the issuance of Indian visas. Due to their relationship with the Indian government, the Ministry of Tourism and Ministry of External Affairs were supportive of this project and 252 visas issued in record time. Challenged by laws that restrict Pakistani citizens’ travel in India, the itinerary had to delight guests and yet show no sign of restriction. The participants may not have another opportunity to travel in India and as such, it is critical that this incentive programme need to embody its theme: “A Journey to Remember”.

The highlight of the trip was a truly amazing welcome reception that embodied the lively and vibrant Indian state of Punjab. An outdoor venue decorated with flowers, marquees, village market stalls and local performers – including the city’s top Punjabi pop singer – recreated a traditional village atmosphere and a most memorable experience for all participants. In addition to giving the Tetra Pak Pakistan participants “A Journey to Remember” this incentive programme opened new doors and set a benchmark for future incentive programme trips between Pakistan and India.

In 2007, Creative Travel India won the SITE (Society of Incentive Travel Excellence) Crystal Award which honours professionals in performance improvement for its “A Journey to Remember” programme for Tetra Pak Pakistan. It was the first Asian company to win this coveted Award.<sup>5</sup>

### 2.2.3 Case study: insights into incentives

In 2015, Business Sydney (BESydney) revealed that Asian incentive delegates are Sydney’s highest yielding delegate, outspending holiday visitors by an average of 6.5 times, and up to as much as 9.4 times.<sup>6</sup> The bureau’s study on *Asian incentive events in New South Wales: expenditure and retail impact*<sup>7</sup> followed its earlier investigation into measuring the accurate value of ‘new money’ to destinations that host conferences. Commissioned by BESydney and developed in collaboration with the University of Technology, Sydney, the study analysed the corporate incentive market, with a focus on Asia. The report measured the expenditure of both delegates and organizers of Asian incentives in New South Wales and included insights into the retail impact of such events.

5 Creative Travel (n.d), ‘Creative Travel India wins SITE Crystal Award for Excellence in Incentive Travel’, press release, *Creative Travel* (online), available at: [www.travel2india.com](http://www.travel2india.com) (08-12-2016).

6 Business Events Sydney (2015), ‘New study finds incentive delegates to be the highest spending business event segment’, press release, 25-05-2015, *Business Events Sydney* (online), available at: [www.businesseventssydney.com.au](http://www.businesseventssydney.com.au) (08-12-2016).

7 Foley, C. et al. (2015), ‘Asian incentive events in New South Wales: Expenditure and retail impact’, *Business Events Sydney* (online), available at: [www.businesseventssydney.com.au](http://www.businesseventssydney.com.au) (08-12-2016).



Sydney has seen 20% year-on-year growth over the past decade in the value of events secured from Asia and this market now accounts for almost half of the business the city secures and delivers each year. Shopping pursuits were revealed as a key part of the delegate experience for Asian visitors. The research found that incentive travellers were likely to shop extensively because it was considered an important part of the leisure experience to shop in a location other than their home as it demonstrated affluence and achievement, and because most of their travel expenses were covered by the incentive trip itself. The study revealed that incentive delegates are knowledgeable and savvy travellers who want more immersive experiences.

## 2.3 Association congress

The association meetings market consists of international associations, international governmental organizations and international non-governmental organizations (NGOs). The market covers a wide range of event types and categories, for example:

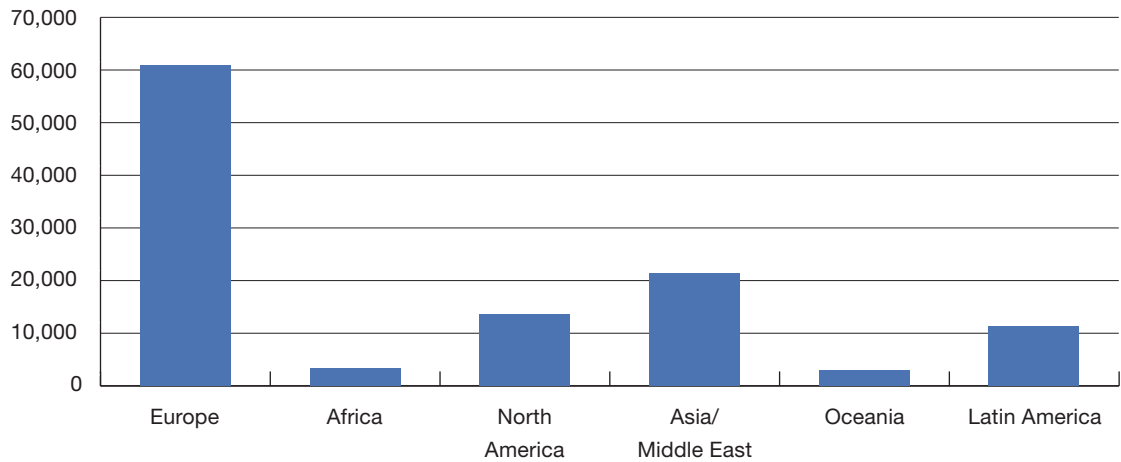
- Medical meetings (currently the largest segment of the market);
- Scientific and other academic;
- Trade organizations and professional bodies; and
- Social groupings.

In terms of size, budget, duration and complexity of event, there are wide variations between and even within categories. But the key similarities identified are:

- Almost every association holds one or more meetings/conventions per year;
- These meetings are repeated at regular intervals (annual, biennial etc.);
- Conventions rotate around the world and rarely return to the same destination within a short span of time;
- The initiative to host a meeting often comes from the local chapter or counterpart, which is usually the national association. If the local chapter is not motivated to organize the meeting, there would be high chances that the meeting would be held elsewhere instead;
- Association meetings have a long lead time, sometimes as long as five years or more; and
- The decision-making process does not necessarily include an official bidding procedure, but could have a main ‘initiator’ who selects the location and venues based on pre-determined and strict criteria.

For any congress to be defined as an ‘international association’ meeting, it should meet the criteria established by either ICCA (International Congress and Convention Association) or UIA (Union of International Associations) – the two most recognized organizations that are focused on collecting information on international associations and international meetings industry. In addition to ICCA, UIA also issues its highly anticipated global rankings. The differences between ICCA and UIA rankings are due to the criteria used to define ‘international association meetings’. As a general rule of thumb, UIA qualifies more association meetings due to their less restrictive criteria. Due to the different criteria used for their annual rankings, there is a variance in results. For purposes of this report, ICCA statistics are used throughout to maintain consistency.

Figure 2.1 Number of association meetings per region, 2006–2015

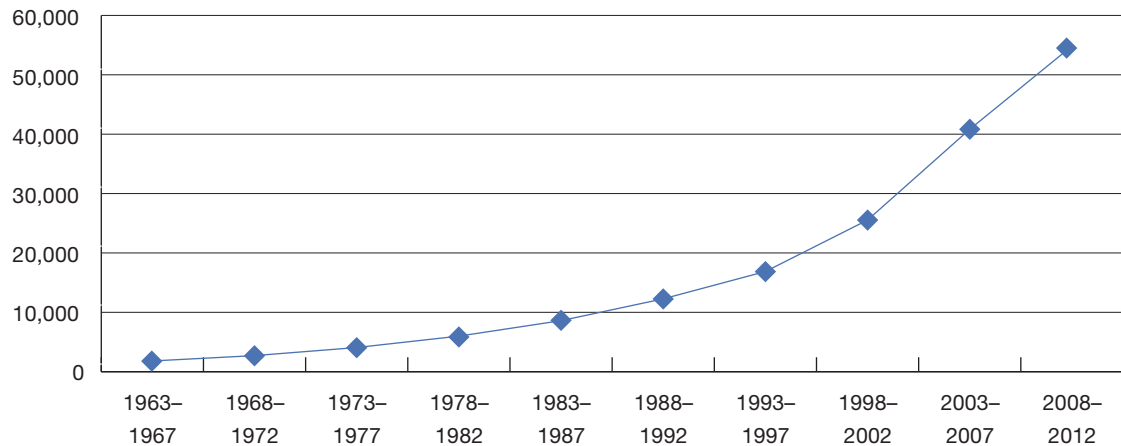


Note: The country sub-regions for figure 2.1 and figure 5.1 pertain to that of ICCA and differ from the UNWTO five regions (Africa, Americas, Asia and the Pacific, Europe and the Middle East). Refer to annex I for the full information on ICCA breakdown of sub-regions.

Source: International Congress and Convention Association – ICCA, *ICCA Statistics Report 2015 – Worldwide*.

Currently, it has been estimated that about 20,000 association meetings are currently being organized on a regular basis.<sup>8</sup> Using five year moving aggregates, ICCA reported that the association meetings market has been doubling in size every decade since the 1960s with no sign of any slow-down to this trend. This is attributed to the fact that such congresses are considered the primary means by which advances and new ideas in healthcare, science, technology and a myriad of other disciplines take place.<sup>9</sup>

Figure 2.2 Exponential growth of association congresses among ICCA members, 1963–2012



Note: International Congress and Convention Association, today has members in over 90 countries worldwide, representing all services within the meetings industry.

Source: International Congress and Convention Association – ICCA, *The Modern History of International Association Meetings 1963–2012*.

8 International Congress and Convention Association – ICCA (n.d.), *ICCA Data* (online), available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (19-07-2016).

9 International Congress and Convention Association – ICCA (2013), *A modern history of the international meetings industry*, press release, 17-09-2013, International Congress and Convention Association (online), available at: [www.iccaworld.org](http://www.iccaworld.org) (08-12-2016).

Figure 2.2 represents five-year aggregated data between 1963–2012. The number of association congresses captured in the ICCA Associations Database has grown exponentially by approximately 10% each year. This means that the number of association congresses doubled every 10 years.

When it comes to country or city rankings, it is quite possible that the destination has hosted more association meetings than reflected in ICCA's database. In such a scenario, the 'missing' meetings were not reported to ICCA or they did not meet ICCA's definition of an international meeting. The rankings are a snapshot at a moment in time, and as such can be 'fluid' when previously unreported meetings are eventually included into the ICCA database. However, these same issues affect all destinations, so the ICCA statistics are still seen as a meaningful indicator of relative performance.

**Table 2.1 Number of international association meetings hosted in Asia, 2006–2015**

Country	Number of international association meetings
China	3,700
Japan	3,406
Republic of Korea	2,365
Singapore	1,462
India	1,360
Thailand	1,316
Taiwan Province of China	1,280
Hong Kong, China	988
Indonesia	802
Philippines	501
Viet Nam	452
Macao, China	188

Note: Other Asian countries recorded less than 180 meetings according to ICCA's criteria.

Source: International Congress and Convention Association – ICCA (2016), *2015 ICCA Statistics Report* (online), available at: [www.iccaworld.org/knowledge](http://www.iccaworld.org/knowledge) (08-12-2016).

**Table 2.2 Top-10 global association meetings by country and city, 2015**

Ranking	Country	Number of association meetings	Ranking	City	Number of association meetings
1	United States of America	925	1	Berlin	195
2	Germany	667	2	Paris	186
3	United Kingdom	582	3	Barcelona	180
4	Spain	572	4	Vienna	178
5	France	522	5	London	171

Ranking	Country	Number of association meetings	Ranking	City	Number of association meetings
6	Italy	504	Joint 5	Madrid	171
7	Japan	355	<b>7</b>	<b>Singapore</b>	<b>156</b>
<b>8</b>	<b>China</b>	<b>333</b>	8	Istanbul	148
Joint 8	Netherlands	333	9	Lisbon	145
10	Canada	308	10	Copenhagen	138

Source: International Congress and Convention Association – ICCA (2016), 2015 ICCA Statistics Report (online), available at: [www.iccaworld.org/knowledge](http://www.iccaworld.org/knowledge) (08-12-2016).

As mentioned earlier, for the sake of consistency, this report will utilize one set of statistical information – from ICCA – for association meetings. However, the Republic of Korea and Singapore are the world's second most popular country destination and the world's most popular city destination respectively in the Union of International Associations' (UIA) Rankings 2015. In the city rankings, Seoul was third after Singapore and Brussels. Tokyo and Bangkok also made the top-10 rankings at 6th and 7th positions respectively.

Table 2.3 Number of international associations hosted by country and city, 2015

Ranking	Country	Number of association meetings	Ranking	City	Number of association meetings
1	Japan	355	1	Singapore	156
2	China	333	2	Seoul	117
3	Republic of Korea	267	3	Hong Kong, China	112
4	Singapore	156	4	Bangkok	103
5	Thailand	151	5	Beijing	95
6	India	132	6	Taipei	90
7	Taiwan Province of China	124	7	Tokyo	80
8	Malaysia	113	8	Kuala Lumpur	73
9	Hong Kong, China	112	9	Shanghai	55
10	Indonesia	78	10	Kyoto	45

Source: International Congress and Convention Association – ICCA (2016), 2015 ICCA Statistics Report (online), available at: [www.iccaworld.org/knowledge](http://www.iccaworld.org/knowledge) (08-12-2016).

Association congresses have broad impacts on both the host destination and on the wider world. Whether it is knowledge transfer, innovative partnerships forged or destination showcasing, every destination which has recognized the strategic importance of hosting international congresses is taking steps to harness the power of their meetings to drive forward their economic agendas. This is being manifested through Conference Ambassador programmes, Local Associations Development efforts, financial and in-kind support to organizers and government investment in meetings infrastructure.

Most associations have meetings or congresses that are repeated at regular intervals and which rotate among its members' destinations. The initiative to host a meeting often comes from the local member or national association/society. Visionary convention bureaus typically invest time, effort and money to incubate and groom their national associations who are members of international associations.

### 2.3.1 Association congress trends

#### Enduring legacies

Today, it is a well-known fact that meetings and events that are organized to rotate among different destinations bring direct economic impacts to their host destinations. Association congresses also leave lasting legacies long after the event is over. Legacy means ensuring a positive impact in a broad number of areas from the planning, delivery and hosting of meetings and events.

There are already many forward-thinking associations which embed corporate social responsibility (CSR) components in their congress programmes – these can be student and youth development projects; cleaning up rivers and beaches; or fundraising and raising awareness of causes in need. Association meetings – many of which began as scientific meetings – can create legacies that transcend geographical, political and social boundaries. Today, it is more important than ever to recognize that meetings and events leave behind not only positive economic impacts, but also social legacies.

#### Hybrid events

To increase revenue streams, associations are looking at hybrid conferences and meetings which incorporate exhibitions, technical tours, business matchmaking or hosted buyers programmes, and even virtual components. A popular version is combining a live event with a virtual one. For example, when Thailand Convention and Exhibition Bureau (TCEB) organized its meetings industry workshop in 2015, one session linked in with ICCA's Annual Research, Sales and Marketing Programme which was taking place in Amsterdam, giving an additional dimension to participants.

With the amount of content available online and the ability to watch a speaker present virtually, the incentives for participants to travel to attend an association conference and meeting have changed over the past years. So it is no surprise that participants want associations to do more in maximising opportunities for learning and information exchange during and after conferences through the use of technology. One example is the Australian Veterinary Association. While it has not increased the number of live member events held every year, it has conducted more frequent webinars over the recent years in order to reach out to more members. Technology has made the production of webinars easier and more affordable than before, taking content to people who missed the live conferences.

Other associations are welcoming public attendance in their conferences or events. This has proven to enliven the show for both professional conference participants, as well as exhibitors. It also fulfils the association's advocacy role and mission.

### Higher expectations on return on investment (ROI)

Although there are many benefits from association meetings and conferences that are hard to quantify, there is an increasing need for associations and meeting planners to measure the returns on investment (ROI) in order to effectively demonstrate their value and relevance to members and participants. Members are demanding more value than ever at a time of budget restrictions and cost-containment. Associations are now pressed to demonstrate what could be considered as 'value' and healthy returns. For the associations, measuring ROI enables them to identify unnecessary expenses and what could be done to attract more participants and revenue.

Table 2.4 Common return on investment (ROI) indicators

	ROI indicators	Description
1	Total attendance	One of the most commonly used indicators.
2	Registration fee from participants	This has been an important indicator for associations for the past years as registration fees have become increasingly one of the primary objectives, and form a significant bulk of the revenue gained from the event.
3	Response and feedback	Although responses from participants could be fairly inconsistent, it has been a useful way to gather feedback on the quality of event (e.g., programme content and relevance).
4	New client leads or contacts gained by participants	This has been an increasingly popular and effective method to measuring ROI as it lies in the quality of leads generated.
5	Quality of participants	It has been increasingly common to publish testimonials by participants commenting specifically on the 'quality of other participants' in the event.
6	Learning objectives	This comes from responses from the participants, and establishes a clear indication of whether programme objectives have been met.
7	Development of new revenue streams and initiatives	Besides driving sponsorship numbers and staging concurrent exhibitions (or increasing exhibition numbers), organizers are exploring new partnerships, introducing innovative ideas, and expanding into new markets or sectors are potential new revenue streams.
8	Press/Media Coverage	Organizers are recognizing the positive impact of press and media coverage, and are making this ROI one of their primary objectives to drive awareness and performance.
9	Membership Growth	A successful meeting/conference can result in membership growth for the associations, although it could be a gradual progress through continuous engagement. This is an indicator often used by associations who bundle event registration and membership registration together.

The indicators in table 2.4 have their place in determining the ROI of meetings. Although organizers may not be using all of them at the same time, they do utilize a combination of these methods to provide the best outcomes, or the best report card they could show to their stakeholders. ICCA has developed a Personal ROI Handbook for its members to create a personal record of the total value they obtain from attending an event. Delegates to the ICCA Congress, or any other business event, are encouraged to write down their objectives for attending and keep a record of their action points and ROI.

While the main play of any successful event will always focus on the needs of the delegates, meeting planners are seeing how these types of public invitations and engagement – which show just how much goes on behind closed doors at a conference – are key to highlighting the organization's mission to the general public and the broader community.

Some associations are inviting the general public to be part of their association congresses in order to benefit from the convergence of world experts in their quest to leave legacies for the general public and broader community of the host destination. This engagement will help the public better understand what goes behind the scenes and how hosting such events are beneficial to their communities. One way is through public forums. The American Academy of Neurology ran a Brain Health Fair – a free, one day public programme – during its conference of 12,000 neurologists and health care professionals during their conference in Vancouver. This created the opportunity for the public to attend and meet with top neurologists over the latest treatments for conditions such as Alzheimer's, Multiple Sclerosis, stroke and other types of ailments.

In Glasgow, the city's first 'Coffee Shop Conference' took place during the 6th Europaediatric conference, organized by the European Paediatric Association. The Glasgow City Marketing Bureau had coined the idea of 'coffee shop conferences', which allow medical and scientific associations to hold informal symposia with the local community. World leaders in the field of child health met with local parents at Offshore coffee shop, in Glasgow's West End, to offer free expert advice in an environment where the community was familiar with and comfortable. There has since been a surge of interest from coffee houses across the city, keen to host a similar event.

"Coffee Shop Conferences offer our conference the ability to take current research from the conference room to the public in a relaxed, familiar and welcoming environment. They give the city's prestigious scientific and medical meetings an opportunity to connect with the public, on their terms, and make a real difference in the lives of the people who live in the city."<sup>10</sup>

Aileen Crawford, head of Conventions at Glasgow City Marketing Bureau (2013)

## 2.4 Exhibition

Exhibitions are commercial undertakings and staging decisions are influenced by the strength of markets, population and GDP. Exhibition cities have a strategic advantage when they are closer to trading markets, have superior infrastructure, good air access and a growing economy. Trade show producers are focussed on exhibit space sales. That means that their location decisions are largely based on the question of where they can sell the most space. However, a key to selling space is having strong attendance by buyers. If the show offers high numbers of quality buyers then the exhibitors will follow. While the exhibitors are the paying customers to an exhibition, the buyers are its lifeblood.

<sup>10</sup> Meetpie (2013), 'Doctors meet local parents at first "Coffee Shop Conference"' (online), available at: [www.meetpie.com](http://www.meetpie.com) (08-12-2016).

This means, that when selecting a site, show producers will look for the following issues:

- Major markets or close to manufacturers;
- Appealing to buyers;
- Where similar shows do not already exist or are in neighbouring cities;
- Easy air access;
- Plenty of hotel rooms near the venue;
- Sponsor support;
- Efficient staging; and
- Space rental cost.

According to Kai Hattendorf, the Global Association of the Exhibition Industry's (UFI) managing director: "Despite limited global economy growth prospects, the exhibition industry appears dynamic and confident for 2016, with turnover increases expected in most regions and new activities planned for most companies".<sup>11</sup> The Center for Exhibition Industry Research expects growth in four key metrics – attendance, revenue, square metres sold and number of exhibitors. The exhibitions market remains a highly attractive sector for many reasons: events can be highly profitable, they have excellent cash flow characteristics with stand space deposits often paid a year in advance and a high degree of exhibitor renewal.

According to AMR International, one of the leading consultants in this business, the global exhibitions market experienced a slowdown in 2015, expanding by only 1.7% compared to 4.2% in 2014 to reach USD 24.3 billion. This was due to significant declines in the Russian Federation and Brazil, stagnation in Turkey and France, and a weak biennial year in Germany. China overtook Germany as the second largest market after the United States of America, which is an indicator of the permanent shift in market power in favour of China.<sup>12</sup>

In its latest annual report on the *Trade Fair Industry in Asia*, the Global Association of the Exhibition Industry – UFI – reported on the growth of the exhibition industry in the region in 2015. Net space sold at Asian trade fairs jumped by 5.6% in 2015 to almost 19.7 million net m<sup>2</sup>. Of this total, 56% was sold in China, 5.5 times the space sold in Asia's second largest trade fair market, Japan. China posted strong growth of 7.1%. India was the fastest growing trade fair market in Asia in 2015 as space sold jumped by 7.8%. South-East Asia continued post strong growth, as Philippines, Indonesia and Viet Nam all grew by – between 7.2% and 7.8% last year – well above the regional average of 5.6%. Other large markets recorded more modest growth in 2015. Space sold in the Republic of Korea expanded by 3.7% and in Hong Kong, China, by 3.2%. The market in Taiwan Province of China grew by 2.2% while Japan recorded growth of 1.2%.<sup>13</sup>

On 8 June 2016, the exhibition industry – comprising exhibition organizers, venues, associations, and service providers – around the world celebrated the first-ever "Global Exhibitions Day." The campaign focused on the value of exhibiting for companies, the key support role of exhibitions for the development of trade and internationalization, and the stimulating role exhibitions play in driving innovation and competitiveness of companies.

11 Exhibition World (2016), 'UFI's latest Global Barometer Survey reflects global expo optimism', *Exhibition World*, 03-02-2016 (online), available at: [www.exhibitionworld.co.uk](http://www.exhibitionworld.co.uk) (08-12-2016).

12 Exhibitor Online (2016), 'AMR International Releases Globex 2016 Forecast', *Exhibitor Online*, 09-08-2016 (online), available at: [www.exhibitoronline.com/news](http://www.exhibitoronline.com/news) (08-12-2016).

13 The Global Association of the Exhibition Industry (2016b), 'UFI releases new report on the Trade Fair Industry in Asia', press release, 21-07-2016, UFI (online), available at: [www.ufi.org](http://www.ufi.org) (09-12-2016).





The Macao Trade and Investment Promotion Institute (IPIM) celebrates the Global Exhibitions Day 2016 as did the rest of the world's exhibitions industry.

Photo courtesy of Macao Trade and Investment Promotion Institute.

In Hong Kong, China, there was a conference and gala dinner organized by the Hong Kong Exhibition & Convention Industry Association (HKECIA); special spotlight events in Australia organized through the Exhibition and Event Association of Australasia in connection with their annual Leaders Forum; while Germany's Institute for the Trade Fair Industry hosted a special open house for professors and students, just a name a few special events in honour of the global exhibitions industry. The campaign was driven by UFI and IAEE – The International Association of Exhibitions and Events.

## 2.4.1 Exhibition trends

### Exhibitor return on investment (ROI)

Exhibitors are expecting more quantifiable benefits. Organizers have to work harder to deliver a better show experience with a more tangible return on investment (ROI) while maintaining strong financial performance. There is heightened focus on ROI, building databases and tracking leads more effectively. Numerous digital alternatives to exhibitions provide marketers with a more targeted audience and readily available ROI measurements. This trend is most evident in mature markets, but international organizers are also taking this approach into their events in emerging economies. As an example, Dfv media group, one of the big German publishing houses have launched expocheck.com, a platform where exhibitors and visitors can read and write reviews and rate exhibitions.<sup>14</sup>

### Greater use of technology

To date, most of the investment in digital has been directed towards improving show performance. Technology can provide the opportunity for new, meaningful revenue streams for organizers. Lead management tools make exchanging business cards more efficient; show apps facilitate movement across the show floor and enable meeting scheduling between participants. Today, event technology is implemented for its primary functionality such as printing visitor badges, but that functionality can and should be coordinated in a far more valuable data strategy. Organizers can access more intelligence about their event and their communities than ever before.

14 Hall, T. (2016), 'Global Snapshot', *Exhibition World*, 12-05-2016 (online), available at: [www.exhibitionworld.co.uk](http://www.exhibitionworld.co.uk) (08-12-2016).

## Networking

Networking and at-event connectivity are becoming central to the value proposition for attendees. To ensure their continued success longer term, winning venues will need to consider how best they can capitalise on these evolutions through higher quality and more varied facilities that will enhance the networking experience. Fast and accessible Internet connectivity, as well as the ability to track the digital footprint of attendees will move from being a significant competitive advantage to a necessity. Flexible spaces that can accommodate events of various sizes and formats while supporting networking opportunities are a must-have these days.

### 2.4.2 Case study: approved International Fair (AIF) scheme

The Approved International Fair (AIF) scheme in Singapore was developed in 1990 and is currently administered by Singapore Exhibition and Convention Bureau (SECB). It confers official recognition through a stamp of endorsement to selected exhibitions with proven international and commercial appeal. AIF-approved events are identified by the AIF logo, a symbol of the high quality of the event it endorses.

Additionally, as AIF events have good international representation, they are effective platforms for local Singapore companies to participate in as part of their internationalisation efforts. Local companies that exhibit in an AIF event are eligible for double tax deduction (DTD) against their participation expenses subject to eligibility criteria. The DTD is administered by the Inland Revenue Authority of Singapore – IRAS. The AIF scheme is an indication of how firmly SECB believes in the critical role that exhibitions play in the economic and business development of a country's industries. Through extending both a stamp of recognition and Double-Tax Deduction, AIF incentivises local companies to gain exposure through quality exhibitions, and help the exhibition organizer garner local industry participation in their event.<sup>15</sup>

---

15 Singapore Tourism Board (2014), 'Approved International Fair' (online), available at: [www.stb.gov.sg](http://www.stb.gov.sg) (02-02-2017).

## Chapter 3

# Trends, challenges and opportunities

### Summary

Visionary destinations are able to spot meetings industry trends, pin-point their relevance and harness these for positive impact.

This chapter covers a selection of trends which are impacting the global meetings market while also highlighting various drivers, restraints, solutions and opportunities through carefully selected case studies. As the meetings, conference, incentive travel and exhibition landscapes continue to evolve and expand, planners, organizers and host destinations must continually evaluate all elements of their customer experience in order to stay competitive.

### Key words

- New platform tourism services (the so-called sharing economy);
- Sustainable practices;
- Knowledge exchange;
- New technologies;
- Personalised experiences;
- Turning data into action;
- Emerging regions and cities;
- New expectations leading to new standards; and
- Measuring return on investment.

### Key messages

- New platform tourism services (the so-called sharing economy) has impacted the meetings industry;
- Environmental standards are becoming increasingly important to the decision-making process;
- Destinations need to show they add value;
- Use new technologies to create more powerful event experiences;
- Second-tier cities will continue to be increasingly attractive; and
- Meeting organizers need to measure ROI in meetings and exhibitions in order to effectively demonstrate the value and relevance to participants.

As the meetings, conference, incentive travel and exhibition landscapes continue to evolve and expand, planners, organizers and host destinations must continually evaluate all elements of their customer experience in order to ensure they are providing the most relevant environments to foster collaboration, exchange ideas, build relationships and consolidate return on investment. The meetings industry is transitioning at a rapid pace, presenting not only challenges but also opportunities for the players. Here is one simple example – today, networking is no longer a fringe activity to fill breaks in conference programmes but it is increasingly becoming the main focus of events. The adoption and use of technology, the physical design of meeting and networking spaces and the emphasis on “experience creation” are the new buzzwords. There is also increased requirement to demonstrate the value of attending meetings and measure not only return on investment, but also return of objective (ROO).

### 3.1 New platform tourism services (sharing economy)

New platform tourism services (the so-called sharing economy) businesses are becoming more prevalent all over the world. Airbnb, the room-letting network is already affecting traditional room blocks and PCOs' (professional congress organizer) relationships with hotels. In terms of size, Airbnb already has overtaken the largest hotel companies with the number of rooms available through Airbnb estimated to be about 1 million in 2014.<sup>1</sup> A recent IMEX research on the impact of the sharing economy in May 2016 revealed that 65% of business travellers surveyed said they would use the sharing economy for business purposes.<sup>2</sup> While some view this phenomenon as a value-add for the destinations and a chance for visitors to engage with locals for the authentic experience, the hotel industry has been impacted. The International Association of Professional Conference Organisers (IAPCO) has reported that the number of room nights booked by IAPCO members fell by 1.4 million in 2015 as a result of the sharing economy.<sup>3</sup> In response, some hotels are redesigning their properties to emphasize welcoming communal areas, mobile-based concierge services, offering customised guest experiences through design, dining and music, and providing free high speed Internet.

Airbnb has signed partnerships with three major corporate travel management companies – American Express Global Business Travel, BCD Travel and Carlson Wagonlit Travel. With these new partnerships Airbnb data will be integrated as a preferred supplier into the systems used by company travel managers.<sup>4</sup> In the meantime, AccorHotels has bought Onefinestay, a London-based short-term vacation rental company in its efforts to expand into this area. Earlier this year, it also bought a minority stake in Oasis Collections, another short-term vacation site.<sup>5</sup>

#### 3.1.2 Case study: San Francisco Travel Association (SFTA) and Airbnb

Last year, the San Francisco Travel Association (SFTA) and Airbnb announced a new destination promotion partnership, the first of its kind for a DMO. This partnership leverages new platform tourism services (the so-called sharing economy) as a new way of meeting the needs of visitors to San Francisco and driving the economic impact of tourism to neighbourhoods throughout the city. During peak season or when there is a city-wide convention, Airbnb rentals will allow people to come into the city and stay in the neighbourhoods and support businesses and attractions in those areas.

Recognizing that Airbnb is part of the evolution of the travel industry, SFTA will continue its strong relationship with the hotel community while it leverages on this new way of doing business which extends to many business sectors within San Francisco, meet the needs of their visitors, provide

1 Baker, M. (2015), 'Barclays: Airbnb usage to surpass hotel companies, but not for business travel', *Business Travel News (BTN)*, 16-01-2015 (online), available at: [www.businesstravelnews.com](http://www.businesstravelnews.com) (09-12-2016).

2 The Worldwide Exhibition for Incentive Travel, Meetings and Events (2016), 'IMEX Group Sharing economy survey reveals differing views among meetings industry around the world', IMEX, 20-04-2016 (online), available at: [www.imex-frankfurt.com](http://www.imex-frankfurt.com) (09-12-2016).

3 Meetpie (2016b), 'Room blocks "a thing of the past" as Airbnb bites' (online), available at: [www.meetpie.com](http://www.meetpie.com) (08-12-2016).

4 Airbnb (2016), 'CWT adds Airbnb for Business to client offerings', press release, 12-07-2016, Airbnb (online), available at: [www.press.airbnb.com/news/](http://www.press.airbnb.com/news/) (09-12-2016).

5 Scott, M. (2016), 'AccorHotels of France Buys Onefinestay for \$169 Million', *The New York Times*, 05-04-2016 (online), available at: [www.nytimes.com](http://www.nytimes.com) (09-12-2016).

increased value for travel industry and expand tourism-related revenue overall. Additionally, Airbnb will be able to meet the diverse accommodation preferences of a wide range of delegates coming to the city. Tourism is San Francisco's largest industry with some 24.6 million visitors in 2015, out of which 5.8 million are business travellers.<sup>6</sup>

Corporate Airbnb stays are mostly centred around a few hotspots in the world, with San Francisco being the most popular, probably because of the high average cost of hotels and the number of technology companies based there that are more open to using new platform tourism services (the so-called sharing economy) accommodation options for work trips. Major events are also big drivers – bookings reported increased dramatically during Salesforce.com's annual Dreamforce conference held in October.<sup>7</sup>

## 3.2 Sustainable practices

Sustainability is a significant trend that is impacting all segments of meetings. It will remain a guiding principle to influence all areas of meeting planning, from the construction and renovation of venues, to how participants are moved from one place to another, and to food and entertainment provided for social programmes. In an industry where environmental standards are becoming increasingly important to the decision-making process in terms of where to hold conferences and events, continuing commitment to quality and environmental excellence will translate to more successes for destinations with sustainable practices.

The Singapore Tourism Board (STB) has developed Sustainability Guidelines to serve as a reference for its meetings industry players. These Guidelines are referenced from international standards such as ISO 20121 and the APEX/ASTM Environmentally Sustainable Meeting Standards. The Guidelines cover seven industry categories from across the meetings ecosystem including hotels, venues, event organizers and meeting planners, transportation, food and beverage, as well as audio-visual set up.<sup>8</sup>

Meetings practitioners can also refer to other sustainable standards, initiatives and guidelines including BS8901 – sustainable event management system; APEX – Accepted Practices Exchange; and GRI – Global Reporting Initiative.

### 3.2.1 Case study: 15th Conference of the Parties (COP 15)

In 2009, Copenhagen hosted the 15th Conference of the Parties (COP 15) UN Climate Conference, welcoming 33,000 delegates. 6,000 journalists covered the conference, making it the largest media event ever held in Denmark. The legacy left by COP 15 did not just impact Denmark's economy but also greatly enhanced its global profile. Not only was it the most environmentally friendly conference, it paved the way to the drafting of the "Copenhagen Sustainable Meetings Protocol – Sharing Best Practices and Leadership Strategies".

6 San Francisco Travel (2016), *San Francisco Travel reports record-breaking year for tourism* (online), available at: [www.sfttravel.com](http://www.sfttravel.com) (09-12-2016).

7 Concur (2016), 'New Concur data shows Airbnb Business is growing quickly among corporate travelers', *Concur*, 3-11-2016 (online), available at: [www.concur.com/newsroom](http://www.concur.com/newsroom) (09-12-2016).

8 Singapore Tourism Board (n.d.), *Sustainability Guidelines for the Singapore MICE Industry*.

COP 15 is the first United Nations (UN) event to achieve BS8901 certification of its management system. The 'green results'<sup>9</sup> from this event were impressive, among many others, the following were achieved:

- 100% of 72,374 tons of the event's carbon emissions were offset;
- 93% delegates used public transport;
- 75% of food and beverage was certified organic; and
- EUR 532,000 saved by not handing out speakers' gifts.

However, COP 15 did not end just with these results. It went on to produce a chain reaction. COP 15 was a multiplier for city change. For Copenhagen, hosting COP 15 catalyzed many long-term changes including setting the goal to be carbon neutral by 2025; citizen engagement and education; the development of Climate+ a green business programme; retrofitting of municipal buildings and purchasing of new infrastructure for electrical vehicles.

The city went on to organize the Copenhagen Climate Summit for Mayors. Additionally in 2014, Copenhagen was winner of the European Green Capital Award.

### 3.3 Knowledge exchange and transfer

Advancing communications technology and wider Internet reach have enabled meetings organizers to create an online system to share pertinent information and knowledge with delegates at a cheaper price and shorter time than before. More organizations understand the need to extend the reach and lifecycle of their meetings, and to expand the learning exchange to more people. One solution is to adopt options that are easily available for integrating technology or social media. This can be something as easy as a Twitter hashtag related to an event, or creating speaker videos, audios and visuals over the web on demand after the conference.

The fast changing landscape of technology will have a heavy influence on developing forms of knowledge and education transfer, which not only changes the design of a typical meeting but also the extensiveness of connections that could be made between participants, hosts, speakers, and even sponsors. Hybrid conferences and meetings incorporating exhibitions, technical tours, business matchmaking and virtual components allow a much richer and often global speaker participation process, and in turn attracts a larger pool of participants, allowing engagement throughout the year.

On a macro scale, destinations lure meeting organizers where knowledge and education are primary goals of their meetings, with their specialist industries. Companies and associations increasingly select destinations and venues that complement their own industry focus; by doing so, they can tap into local expertise, resources and talent that add value to their meeting's focus and attendees' professional development. As a result, destinations are putting their areas of expertise at the heart of their marketing campaigns, highlighting the added value to organizers. Some destinations are creating their own events based on their local strengths, one example being Seoul which is creating TV, fashion and music events.

9 Whitling, I. (2010), 'Copenhagen Sustainable Meetings Protocol launches on World Earth Day', 28-04-2010, *International Meetings Review* (online), available at: [www.internationalmeetingsreview.com](http://www.internationalmeetingsreview.com) (09-12-2016).



### 3.3.1 Case study: Danish Meetovation

*Meetovation*, developed ten years ago in Denmark, is an approach to meeting design that incorporates the concepts of active involvement, creative setup, responsible thinking, local inspiration and return on meeting investment (ROMI).<sup>10</sup> Meetovation breaks away from traditional, one-way communication with an emphasis on inspiring settings, green consciousness and evaluation through its approach to innovative meeting design concepts, which are focused on team building, learning and knowledge sharing.

Examples of Meetovation meetings are many and varied. They can involve a re-arrangement of the physical set up by having the participants sit on gym balls instead of chairs while engaging in group discussions. They can include healthy, energetic and organic foods and snacks. Or they can focus on recycling and energy saving products and facilities such as using USB sticks and whiteboards as opposed to paper based materials. In short, it offers a new creative approach to meetings. Since 2012, Meetovation has developed rapidly. Danish hotels, conference centres, congress centres, agencies and museums have trained more than 300 of their employees through The Meetovation Training Programme, thereby creating the first *Meetovators*.<sup>11</sup>

## 3.4 New opportunities through new technologies

The conferences and events organization business as we know it is undergoing a period of intense change as new technologies bring about the commodification of traditional services and the diversification of meeting formats. New technologies provide opportunities in previously uncharted territories and new event concepts including audience collaboration and interaction.

With the widespread integration of mobile technology into our daily lives, the meetings industry is shifting to a mobile mindset. Mobile event apps are becoming essential to an effective meeting or event. App providers are expanding and refining the options which include onsite social media networking, targeted group alerts and announcements, peer-to-peer messaging, appointment making and business contact exchange, improved matching, continuing education unit (CEU) tracking and social media engagement. Communication between attendees can be enhanced with notification/photos about who is nearby.

Hybrid events are increasing in popularity and gamification is starting to play a bigger role in increasing engagement. Smart name badges and bracelets radio frequency identification (RFID), near field communication (NFC), or beacons (or a combination of the above) are increasingly used at events. Event photo booths are popular and useful for increasing attendee engagement with attendees posting images (including the event hashtag) to Twitter, Instagram and/or Face Book. Streaming video apps, allowing real-time video postings, are coming to events.

Augmented reality (AR) and virtual reality (VR) will see major growth at exhibitions and events. Singapore exhibited its virtual reality experience at the recent International Confex 2016 and transported users to the heart of the vibrant Lion City. Shangri-La Hotels and Resorts began

<sup>10</sup> Luna, R. (2015), *Meet Meetovation* (online), available at: [www.mpiweb.org](http://www.mpiweb.org) (09-12-2016).

<sup>11</sup> Visit Denmark (n.d), *International Meetovation Training Programme* (online), available at: [www.visitdenmark.com](http://www.visitdenmark.com) (09-12-2016).

the use of VR across its 17 global sales offices, with a quarter of its properties already having 360° videos available for viewing. The entire interior premises of the Adelaide Convention Centre is available for virtual viewing on the Google Virtual Tour platform. Visitors can also tour the perimeter of the centre and along the North Terrace using Google Street Views. Some hotels such as the 431-room NH Collection Eurobuilding in Madrid already offer a 3D telepresence system in its “Smart Rooms” allowing meeting attendees to interact with people remotely via hologram. At the 107th Rotary Convention held in KINTEX (Korea International Exhibition Center) in Goyang City, Republic of Korea 2016, an animated hologram of Rotary founder Paul Harris joined the 45,000 attendees from 160 countries on stage.

Hilton provides a smartphone app that allows their Hilton Honors members to check in 24 hours in advance and receive their room assignment and a virtual key through the app, thus avoiding the potential for a long check-in line at the hotel desk.<sup>12</sup>

### 3.4.1 Case study: the Internet of Things (IoT)

The Internet of Things (IoT) Asia trade event was the first dedicated conference and exhibition in Asia to address the enormous potential of the IoT revolution. To demonstrate in real time the potential of IoT technologies during the event, MAX Atria @ Singapore Expo served as a test bed site for IoT deployment.

IoT sensors dispatched cleaners to washrooms with high ammonia levels; alerted taxi drivers where long queues were developing; and reported to motorists where available car park spaces were. QR codes on attendee badges and a mobile app helped delegates navigate the event. Onsite TV screens showed attendees how the whole process was managed and deployed.

IoT was the first event in the region to focus on bringing IoT technology to end-businesses, governments and society, and to chart the future for IoT in Asia. SingEx Exhibition Ventures was later declared the winner of the prestigious UFI Marketing Award 2016 for launching IoT Asia which saw and seized a market opportunity and provided a platform that connects the various practitioners in the IoT ecosystem. Singex Exhibition Ventures was also awarded ‘Trade Conference Organiser of the Year’ at the 2015 Singapore Experience Awards.<sup>13</sup>

12 Woollacott, E. (2016), ‘Smart data gets hotel guests coming back’, *Raconteur*, 22-09-2016 (online), available at: [www.raconteur.net](http://www.raconteur.net) (09-12-2016).

13 Singapore Economic Development Board (n.d.), ‘Industries’, *Future Ready Singapore* (online), available at: [www.edb.gov.sg](http://www.edb.gov.sg) (11-12-2016).

Singapore Tourism Board (2015), ‘Singapore Experience Awards 2015: 27 outstanding individuals and organisations honoured, annex A – The Singapore Experience Awards 2015 Finalists and Recipients’, media release, 21-10-2015, Singapore Tourism Board (online), available at: [www.stb.gov.sg](http://www.stb.gov.sg) (09-12-2016).



### 3.5 Unique experiences and personalization

From business meetings to education, to relaxation, personalization is powerful and new trend in the meetings industry that looks set to stay. The need to create a compelling meeting experience for delegates is one of most important trends for effective meetings. A focus on guest experience means that organizers have to continue to find ways to meet attendee expectations for authentic, unique, personalised experiences. Today's attendees want to be able to personalise their own experience and expect organizers to create platforms for them to do so.

With networking always a key objective for attendees, IMEX (the Worldwide Exhibition for Incentive Travel, Meetings and Events) has introduced a new initiative at IMEX America 2016 to help buyers to make valuable peer connections before and at the show. Using a data matching algorithm, Zenvoy will facilitate introductions between buyers who share common attributes. Zenvoy will match the buyer with other registered buyers whose business profiles have similar features, share these profiles and suggest that they make contact before potentially meeting at the show.<sup>14</sup>

#### 3.5.1 Case study: Powered by Emotion

Disney Business Solutions, a division of Disneyland Paris, launched a new brand platform designed to make their clients' events more of an experience. The campaign "Turn Events into Emotion" at Disneyland Paris is designed to transform events into 'unforgettable stories powered by emotion' and promises ROE or 'return on emotion'.<sup>15</sup> Their business philosophy is the success of any event is measure by the quality of the emotions it creates. Disney Business Solutions has also updated its logo, giving it a raspberry colour and rounded shape designed to give a warmer look.

#### 3.5.2 Case study: no cookie cutters in Sydney

Sydney and regional New South Wales will inspire and motivate almost 8,000 incentive delegates in 2016. Even though these are huge groups with attendees ranging from 1,500 to 4,000 pax, Sydney has worked hard to personalise the participant experience, even in a group atmosphere. For example, Sydney's hotel, event venues and attractions are focused on being 'China ready' for meetings, catering to their Chinese guests' needs and expectations. Providing Chinese language attendants in the hotels and venues and educating staff on the expectations of the Chinese delegate are just some of the standard offerings that are enhancing the crucial delegate experience. Climbing the Sydney Harbour Bridge for that once-in-a-lifetime experience is a must for most attendees and there are Mandarin-speaking Climb Leaders who can also engage with prospective Chinese climbers via a variety of Chinese social channels including Weibo, WeChat and YouKu.

14 Perry, A. (2016), 'Zenvoy successfully helping IMEX attendees to make most of networking – in advance', *Event Industry News*, 26-10-2016 (online), available at: [www.eventindustrynews.com](http://www.eventindustrynews.com) (09-12-2016).

15 Colston, P. (2016), 'Disney Business Solutions puts emotion at the heart of its MICE', *Conference & Meetings World*, 18-07-2016 (online), available at: [www.c-mw.net](http://www.c-mw.net) (13-02-2017).

### 3.6 Turning data into action

Data analytics has been around for a long time, but only until the last few years have technologies adapted and evolved to enable business events organizers to interpret and use this data to create more powerful and customised event experiences. Data collection, data analysis and measurement of results are becoming fundamental practices in marketing and management of meetings. Pragmatic decision-making will be actively supported by the results of Big Data analysis, and measuring results including ROI from marketing investments which include trade show participation. Real-time event intelligence or collection of onsite data can be a goldmine of information to gain insights for event improvement, to make midcourse corrections, to engage participants and to provide more targeted experiences.

Exhibition organizers are increasingly collecting data from their events to convincingly demonstrate ROI via more comprehensive documentation and supporting data. On-site data capture will help organizers understand attendee on-site visiting patterns. More data enable event organizers to better lay out the floor plan and show programmes. Smartphone data-capture technology includes NFC (near field communications), iBeacon which measures exhibit booth dwell time and 'smart card' registration systems. Exhibition organizers have slowly experimented with beacons to increase engagement with key sponsors. However, the use of new technologies must demonstrate value to the event participants and not be seen as an invasion of privacy.

### 3.7 Emerging regions and cities

#### 3.7.1 The Middle East

The Middle East has been rated by ICCA as the world's fastest growing market for international association meetings as a result of improved convention facilities, increased airlift, a robust hotel pipeline and the creation of the Dubai Association Centre (DAC), making growth potential for the region's meetings sector exceptional.

"The Middle East joined the Information Revolution more recently than most regions, so it is not surprising to see some of the world's fastest growth rates here, now that excellent meetings infrastructure has been developed, governments have created knowledge strategies to underpin their economic development agendas."<sup>16</sup>

Martin Sirk, CEO, ICCA

Since the DAC was established, 23 international associations have decided to open an office in Dubai, consolidating the city's position as the centre for professional associations in the region. This will undoubtedly make the emirate a strong knowledge hub while growing its meetings industry. DAC's aim is also to highlight the emirate's position as a strategic hub of trade and finance supported by a stimulating investment environment and modern infrastructural facilities for global associations to make their base in the region. According to Airports Council International, the United Arab Emirates is the region's most important travel hub with Dubai International Airport

<sup>16</sup> The Meeting Magazines (2014), 'Middle East is fastest growing international meetings market', The Meeting Magazines, 25-03-2014 (online), available at: [www.themeetingmagazines.com](http://www.themeetingmagazines.com) (09-12-2016).

recently surpassing Heathrow as the world's busiest. It has been reported by Euromonitor that 50% of business visitors to the United Arab Emirates are attending meetings, 40% for Oman and 32% for Qatar.<sup>17</sup>

### 3.7.2 Second tier cities

With an ever-increasing eye to cost and in the quest to try new destinations, second-tier or 'non-capital' cities will continue to be increasingly attractive to planners and to delegates. Not only do such destinations offer lower costs and ease of travel access, they can also deliver high quality conference centres and venues, rich cultural scenes and extensive industry expertise in the key sectors they are strong in. Planners looking for top-notch ROI will not rule out world-class second-tier meetings destinations. There are many examples of national convention bureaus mapping out the country's expertise in its priority sectors and using this form of mapping to support second-tier cities. These bureaus identify where conferences and events within key sectors of science, medicine, industry and commerce should be headed. Identifying and singling out sector expertise in order to entice meeting organizers with a knowledge proposition and also to disperse the benefits of meetings are being practiced by many countries around the world including Japan, the Republic of Korea, Germany and the Netherlands.

Second-tier cities are themselves collaborating as "knowledge hubs" in their priority sectors by creating cross-city alliances and networks that market these intellectual capitals as sector gateways to knowledge and expertise. One such example is Daejeon in the Republic of Korea. The Daejeon International Marketing Enterprise is a member of the Global Science and Convention Alliance with the convention bureaus of Adelaide, Australia; Hyderabad, India; Toulouse, France; Prague, Czech Republic; and Oslo, Norway. Each of the bureaux is based in a destination with leading strengths in scientific innovation and research.

## 3.8 New expectations, new standards

The days of classroom style event locations are fast becoming a thing of the past. Today, organizers want to align their corporate brands with meeting designs and locations. Brands are looking for venues that fit their unique values. A bank may choose a venue such as a castle or a decommissioned bank vault, to convey values such as stability, protection, security and reliability. Demand for unusual venues has risen and the unique venue market is now an established sector of the industry and one that continues to add incremental value to it. Event organizers are now making use of these venues and in the process, they are creating more expansive experiences for their attendees.

Organizers are choosing a more 'experience-led' meeting, allowing guests the chance to experience the venue's wider offerings while they are there. These 'incentive extensions' – events that are looking to extend the meeting or conference into the rest of the venue – usually occur at unique venues as more and more customers want to create a complete event experience. Convention organizers and meeting attendees want more flexible, free flowing and relaxed

<sup>17</sup> Meeting & Incentive Travel India (2016), *How the Middle East can grow in stature* (online), available at: [www.meetbizindia.com](http://www.meetbizindia.com) (09-12-2016).

meeting environments. They prefer fresh air, sights and smells over the traditional four-walled meeting rooms.

Food is an integral part of events and not just a secondary consideration. Event attendees have come to expect good food and organizers are looking past traditional catering to focus on innovative experiential dining concepts to complement their event themes. Attendees increasingly expect organizers to follow current food trends – organic, vegetarian, gluten-free, as well as locally sourced. Organizers are also reducing the number of breaks, portioning buffets closer to what will actually be eaten or offer family-style meals to keep prices in check.

### 3.8.1 Case study: managing food waste standard operating procedure (SOP)

In general in Asia, hospitality is important, especially by providing food to guests. This scenario is played out at business events. “Food waste is one of the highest streams of solid waste for events”, said Roger Simons, Regional Sustainability Director for the Asia Pacific Region (APAC) at MCI Group.<sup>18</sup>

To alleviate this situation, some hotels and convention centres have adopted various measures. Some direct excess food that has not yet left the kitchen to the internal staff canteen or charities. The Kuala Lumpur Convention Centre practices bookshelf cooking – non perishable items are pre-cooked and stored to be made ‘a la minute’. This keeps food fresh and reduces over production. In addition the centre has a licensed contractor who collects waste and turns food waste into fish food for local fish farms.

Simons observed that MCI has seen a rise in corporate clients – like Schneider, BASF, Oracle, Symantec and Intel – requesting for venues and suppliers with solid sustainability practices. Venues are working closely with event clients to achieve smarter food management by advising them on food and beverage requirements and providing options to manage unconsumed food responsibly.

## 3.9 Measuring success

The value of meetings has an increasingly important focus for many companies – not only in relation to cost savings, but also in terms of value or return on investment of value-add components. There is an increasing need for associations and meeting planners to measure the ROI in order to effectively demonstrate their value and relevance to members and participants. Similar to the earlier trends mentioned, members are demanding more value than ever at a time of budget restrictions and cost-containment, so associations are now pressed to demonstrate what could be considered as ‘value’ and healthy returns.

At trade shows and exhibitions, both attendees and exhibitors are more demanding than ever. Show organizers are using additional technology to understand the behaviour of attendees and more education will take place on the show floor, allowing exhibitors to extend what they do in

18 Yue, K. (2014), *Food for thought*, November 2014, TTG mice (online), available at: [www.ttgmice.com](http://www.ttgmice.com) (09-12-2016).

their booths. Technology can bring value to participants and drive ROI to the exhibition organizer. The potential for transformation comes from the insights that can be extracted from the data gathered.

There are many different ways to measure ROI or meeting value, and Meeting Professionals International (MPI) has its “Think Feedback MILE” tip to share:

**Measure:** Measure data in a variety of ways at varying times.

**Implicit:** Observe and analyse implicit feedback shared during the event via participants behaviours and actions.

**Live:** Gather feedback during the live event.

**Explicit:** Be creative in how and when you explicitly gather data, use the MILE approach and supplement with interviews, questionnaires and other explicit methods.

MPI has developed a Strategic Meetings Management (SMM) guidebook to help organizers gauge measurements that can then be translated into ROI for the three components of meetings – learning, networking and loyalty. This is supported by a pre, during, and post meeting checklist.<sup>19</sup>

---

<sup>19</sup> Meeting Professionals International (n.d.), *Strategic Meetings Management Research* (online), available at: [www.mpiweb.org](http://www.mpiweb.org) (09-12-2016).



---

## Chapter 4

### Responding to trends and changes

#### Summary

The selection of case studies in this chapter will help bring home examples of how organizations have turned their knowledge of trends into solutions or new product offerings. There are five Asian case studies in five different scenarios. However all of them have the same common goal – to bring more business events to their shores. In the process, these organizations developed best practices – some award winning, all transformative – for the rest of Asia to learn from and benchmark against.

#### Key words

- Mapping regional specialties;
- Thailand MICE Venue Standard;
- Conference ambassador;
- Destination marketing; and
- Human talent development.

#### Key messages

- Knowledge hubs add value to international meetings by linking local expertise within industry sectors;
- TMVS is Thailand's formal certification for its venues and supported by all its trade associations;
- A conference ambassador programme helps anticipate future business prospects thereby allowing sufficient time to engage bid strategies and maximise success;
- Asia Super Team was introduced on the back of “gamification” making this campaign innovative and very appealing; and
- In Singapore, talent is a key component of the nation's meetings industry strategy.

#### 4.1 Mapping regional specialties in the Republic of Korea

In 1996, the Government of the Republic of Korea enacted the Convention Promotion Law<sup>1</sup> to designate and develop convention cities and facilitate the development of convention centres. Classified as Social Overhead Capital Facilities, convention facilities are eligible for financial support in the form of tax exemptions, other payments deduction and building site acquisitions. The Convention Promotion Law also enforced the standards for registration and the responsibilities of the PCOs to maintain high quality service. Monthly wages are expected to be greater than the average wage in related industries.

Today there are eleven regional convention bureaus, each armed with its own state-of-the-art convention centre and no doubt assisted by the government's forward-looking vision and policy. The Republic of Korea has positioned its knowledge hubs to add value to international meetings by linking local expertise within industry sectors.

---

1 Chon, K.S. and Weber, K. (2014), *Convention Tourism: International Research and Industry Perspectives*, Haworth Press, New York, p. 176.

Since 2012, the Ministry of Culture, Sports and Tourism, and the Korea Tourism Organization (KTO) have been fostering a region-specialised convention approach to raise competitiveness while spreading the meetings industry growth across the nation. The marketing strategy focuses on the strength of industry sectors in various cities in the Republic of Korea while offering convention organizers the opportunity to develop topical themes and frameworks around these fields. Known as the “Regional Specialised Convention” strategy, the government focuses on honing the various specialty industries and helping homegrown events to achieve regional and international potential growth. Under this programme KTO provides support to regional cities bidding for developing international events relating to their local industry strengths. Following the events’ conclusion, a review is undertaken to evaluate performance and support eligibility.

Each convention city has been identified for its industry strengths and specifically prioritises events relating to these sectors. In 2014, thirteen conventions covering welfare, water, marine, science and technology and information display were selected. According to the government’s “International Conference Industry Five Year Growth Plan” further support will be provided to strengthen these region-specialised conventions, with 20 such speciality conventions taking place in various cities in the Republic of Korea by the year 2017. KTO will help the selected events with business planning and event financing. Funding will be based on the relevance and growth potential of the event. The regional or city convention bureaus will assist the event organizers with marketing the event and promoting tourism. To give credibility, the government gives its stamp of approval to these events with the issuance of an official certification.

#### 4.1.1 Daegu: nourishing homegrown stars

In recent years, the Daegu Convention and Visitors Bureau (DCVB) has shifted its attention from attracting conventions to cultivating those that already have a strong foundation in Daegu.

Home to four of Republic of Korea’s seven textile and fashion institutes, half of the country’s textile company research institutes and about 2% of the country’s textile companies, fashion and textiles is a well-established industry in Daegu. In 2016, it played host to the Global Textile and Fashion Forum, one of the 15 events in KTO’s global development programme for the year.

As the birthplace of the Samsung Group, Daegu is at the centre of the information and communications technology industry. Local experts in this field include Gumi National Industrial Complex, Kyungpook National University Advanced Display Manufacturing Research Center, Display Technology Research Center and the Daegu Gyeongbuk Institute of Science and Technology (DGIST).

In the same tradition of innovation, Daegu stands out as home to a high-tech medical complex and medical institutions such as the Brain Research Institution and the Korea Institute of Oriental Medicine. The Colorectal Cancer Center at Kyungpook National University in Daegu has played a vital role in pioneering minimally invasive surgery such as laparoscopic and robotic surgery. Daegu’s medical robotics research infrastructure also includes Kyungpook National University robot industry improvement centre, the Center for Pragmatic Research in Robotics of DGIST and the intelligent robot research team of Daegu Mechatronics & Materials Institute.



In 2014, Daegu positioned itself as the leading hub for innovation and development within the textile, display and surgical robotics industry. The city's hand-picked specialty conventions for 'nurturing' that year included TEXFO (International Textile and Fashion Vision Forum), International Meeting on Information Display (IMID) and the 2014 Asian Robotic Camp for Colorectal Surgeons (ARCCS). In 2016, Daegu focused on the water, medical and renewable energy industries, one of which is the homegrown International Water Industry Conference organized by the Kyungpook National University Advanced Institute of Water Industry (KNUAIWI) in collaboration with the Korea Environmental Industry & Technology Institute. A conference related to the photovoltaic energy industry is being planned. The city had successfully hosted the 7th World Water Forum a year earlier, in 2015.

By connecting local expertise with international events, Daegu will not only take these industries to the next level but also see exhibitors and conference delegates converging in the city.

## 4.2 Thailand MICE Venue Standard (TMVS) as ASEAN blueprint

When the 43rd ASEAN Senior Officials Meeting on Tourism, held in early 2016 in the Philippines, agreed to include the MICE Venue Standard (MVS) formulated by Thailand in the ASEAN Tourism Strategic Plan 2016 to 2025, TMVS officially became the model for the development of a broader ASEAN MICE Venue Standard (AMVS). Thailand will lead the sub-committee for the development of the AMVS, anticipated to be completed and active by 2017 and in the process will cement the nation's leadership role in meetings standards on the ASEAN stage. Once the ASEAN Standard is widely adopted, ASEAN entrepreneurs will be ready and equipped with the business edge to succeed and to better position the region as the preferred meetings region.

TMVS is Thailand's first formal certification for venues in the region and supported by all its trade associations, such as the Thailand Incentive and Convention Association (TICA), Thai Exhibition Association (TEA), Thai Hotel Association (THA), Association of Thai Travel Agents (ATTA), Association of Domestic Travel (ADT) and the Faculty of Social Sciences and Humanities, and Mahidol University. A standards handbook was developed through a joint consultancy process involving the Thailand Convention and Exhibition Bureau (TCEB) and all its trade association partners. The certification process covers three main components – physical, technological and service aspects – with indicators, factors and scores varying among different venue types. The project was initiated in late 2012 targeting the meetings supply chain that included convention centres, hotels and resorts and public and private organization venues.<sup>2</sup>

In December 2015, TCEB further introduced new standards. The "Thailand's MICE Venue Standard Model Scheme for 2015–2020" included six areas of development:

1. Improvement of Thailand's MICE venue standard (TMVS) to meet international standards;
2. Development of human resources related to TMVS;
3. Advancement of IT systems for TMVS;
4. Public relations and marketing promotional activities for TMVS;
5. Using TMVS as the basis for ASEAN MICE Venue Standard; and
6. TMVS as the agent for sustainable development in meetings and business events.

<sup>2</sup> Thailand Convention and Exhibition Bureau (2015), 'TCEB Celebrates Success of Thailand MICE Venue Standard', press release, 29-01-2015, Thailand Convention & Exhibition Bureau (online), available at: [www.tceb.or.th](http://www.tceb.or.th) (24-04-2017).

The standardisation will serve as a guideline for investments, operations and management, and marketing support plus build organizers' confidence in Thailand's products and delivery while enhancing Thailand's international competitiveness. Onehundred Thai meetings operators were part of the TMVS process in the 2016 fiscal year. These included venues in Thailand's five MICE Cities comprising Bangkok, Pattaya, Phuket, Chiang Mai and KhonKaen –, as well as other Thai cities including Hua Hin, Ratchaburi, Kanchanaburi, and NakhonRatchasima.

TCEB will continue to work closely with Mahidol University to further develop a five-year strategic roadmap (2015–2019) for the TMVS, while developing capabilities of certified operators through training courses including venue management courses in collaboration with TEA and TICA, as well as educating other operators on how to get certified. In addition to leading the ASEAN sub-committee on AMVS, Thailand will offer training workshops on the standard which will allow the Kingdom to position itself as the hub of meetings industry education within ASEAN.

#### 4.2.1 Setting the bar

Thailand's event management standards include green initiatives, safety measures and sustainable growth:<sup>3</sup>

- Thai meetings operators to become accredited in ISO 50001 Energy Management System to increase energy efficiency, reduce costs and improve environmental performance;
- While many in the industry already have GMP (Good Manufacturing Practice) and HACCP (Hazard Analysis Critical Control Point) certificates, Thailand's goal is for the industry to achieve ISO 22000, the global standard and food management system for its whole food chain; and
- Thailand implements and encourages certification in the new standard ISO 20121, the Event Sustainability Management System which advocates events management based on social, economic and environmental considerations.

### 4.3 Malaysia's *Kesatria*

Malaysia anticipates that association conferences will help raise its standing on a global scale and contribute to Malaysia's meetings target of MYR 3.9 billion (USD 970.3 million) in gross national income by 2020. This is just one reason why Malaysia's Conference Ambassador Programme is so important – it is designed as an incubator for potential local hosts of international conventions.

The Malaysia Convention & Exhibition Bureau (MyCEB) established their *Kesatria*<sup>4</sup> 1 Malaysia Conference Ambassador Programme to help anticipate future business prospects thereby allowing sufficient time to engage bid strategies and maximise success. The *Kesatria* 1 Malaysia Programme is designed to recognize the efforts and contributions of industry leaders and their respective institutions that choose to bid for and host major international conventions and meetings.

3 Thailand Convention and Exhibition Bureau (2014a), *MICE Capabilities: MICE Standards* (online), available at: [www.businesseventsthailand.com](http://www.businesseventsthailand.com) (09-12-2016).

4 *Kesatria* in the national language means "warrior" or "knight".

Launched in 2012, the Kesatria 1 Malaysia 'members' are most often the president or past president of national associations or industry leaders who have chaired or will be hosting a major international business event in Malaysia. These conference ambassadors are thought leaders in their field of expertise and recognized for their professional achievements in bidding for and hosting major international conventions.

The Kesatria programme focuses on the engagement of previous local hosts to become advocates for the convention bureau. Previous local hosts usually have the knowledge and experience with bidding for and hosting international conventions and act as an extended "early-warning system", since they are primed to be aware of open years and the announcement of requests to bid. This builds a 'pipeline' of prospective bid targets, ensuring that MyCEB can generate a constant stream of bids-in-progress.

Such Ambassadors also understand the benefits to the association, industry and economy and are often willing to share their experience with other potential hosts. As such, the core component of Kesatria is engaging industry leaders and leveraging their contacts within their own industry circle. While the rules, processes, and decision-making criteria differ from association to association, and the relative power and influence of local association contacts will similarly vary, it is almost always the case that the input from these locals will have a significant impact on the decision where an international meeting should take place. Kesatria 1 Malaysia started off with 17 conference ambassadors, and three years later, the programme has 37 highly enthusiastic and supportive 'warriors' who have generated 85 international convention leads which are set to deliver an estimated economic impact of MYR 1.6 billion or almost USD 400 million while attracting more than 150,000 delegates to Malaysia, said the former Secretary-General of the Ministry of Tourism and Culture Malaysia, Tan Sri Dr Ong Hong Peng.<sup>5</sup>

### 4.3.1 Local champion, global host

An example of an event that has influenced a country's image is the 2015 Human Genome Meeting (HGM) in Malaysia. Malaysia submitted a bid to host this meeting in 2011. This initiative was led by Zilfalil Alwi, board director of Global Variome Limited, which is a non-profit based in the United Kingdom founded to provide support services to the international coordination work of the Human Variome Project. Other country competitors for this bid were Thailand, Japan, the United Kingdom and Italy. In the end, Malaysia won the bid and hosted the meeting in Kuala Lumpur. The event was attended by 386 participants from 47 countries.

HGM 2015 played an instrumental role in promoting Malaysia as a leader on the global bioinformatics and genomics research industry, and expedited scientific breakthroughs in the medical, agricultural and industrial sectors. The meeting was an opportunity for the country to showcase its genomic research capabilities taking into account the 12 genomic centres located all over Malaysia. This meeting has spurred other association executives to emulate the leadership role that Zilfalil played.

Zilfalil is now planning to bid for the International Conference of Gastrointestinal Hereditary Tumours to be held in Malaysia.

<sup>5</sup> Bernama (2016), 'Malaysia's Kesatria generate 85 international convention leads with an economic impact of RM1.6 billion and 150,000 delegates', press release, 24-02-2016, Bernama (online), available at: [www.bernama.com](http://www.bernama.com) (09-12-2016).

## 4.4 Destination marketing in Taiwan Province of China

In 2014, a multinational competition event “Asia Super Team” was launched with the goal to promote Taiwan Province of China as the top-of-mind destination for incentive travel. Recognizing that incentive travel is a management tool for companies to enhance company cohesion and nurture team spirit, the campaign was introduced on the back of “gamification” inviting businesses in five target markets to pursue the goal of becoming “Asia’s Super Team.” The goal of this event is to educate potential incentive buyers and corporate end-users on the destination’s meetings facilities, food, entertainment, art and culture, as well as nature and adventure.

Comprising team building elements, virtual participation and a publicity model where participating teams play a leading role on social media in sharing and spreading content, Asia Super Team was a B2B competition that was promoted extensively on social media including LinkedIn, Facebook and Twitter. Road shows were organized in Indonesia, Malaysia, and Singapore to encourage the companies to sign up for the Asia Super Team competition.

Participants were required to create itineraries about their dream incentive trips and introduce their company culture to show why they could be an Asia Super Team through their employees’ social networks. Five finalist companies consisting of four team members from each country were selected to enter a five-day-four-night competition tour to Taiwan Province of China for USD 50,000 worth of incentive travel products. Participants were transformed into trip planners – each submitting a Taiwan Dream Itinerary using the contest’s customized Google Maps trip-planning website which also provided details of Taiwan Province of China’s incentive travel.

The results<sup>6</sup> of this campaign was impressive – it reported a 123% increase in Asian companies that selected Taiwan Province of China as their destination of choice for incentive travel within the six months following the programme (as compared to 2013), and an economic contribution of USD 170,000. The media exposure included features in key business magazines like *Bloomberg* and *The Economist*, incentive travel platforms such as *International Meetings Review* and *CEI Magazine (Conferences, Events and Incentives Magazine)*, and the portal site Yahoo! Japan. There were also a total of 10 million social media impressions, and over 100,000 unique viewers visited the Asia Super Team website. All contestants from the five participating Asian countries were willing to recommend Taiwan Province of China as the best destination for corporate incentive travel after participating in the Asia Super Team programme.

In 2015, the second edition was launched with a corporate social responsibility theme. At the conclusion of *Team Up for Good*, Meet Taiwan and the winner jointly donated USD 5,000 in charity funds to the Cambodian Women’s Development Agency. The 2016 edition, featured a new gamification design presented as a Monopoly-styled online quiz game in the first phase. Pathum Thani Brewery Co. Ltd. from Thailand was eventually declared the winner of Super Team Asia 2016.

6 For more information see: [www.asiasuperteam.meettaiwan.com](http://www.asiasuperteam.meettaiwan.com).

This marketing campaign won the Society for Incentive Travel Excellence (SITE) Crystal Award in 2015<sup>7</sup> as “the Most Effective Incentive Marketing Campaign” and also won the Gold Stevie Award 2015 for “B2B Marketing Campaign of the Year”.<sup>8</sup>

## 4.5 Singapore

In Singapore, talent is a key component of the nation’s meetings industry strategy. Future leaders benefit from a structured curriculum which is reinforced through training, on-the-job experience, coaching and mentoring programmes which will identify high potential talent and match them with corporations which will help them to grow further. The Singapore Association of Convention and Exhibition Organisers and Suppliers (SACEOS) was set up in 1979 and has been working closely with the government to meet the objective of making Singapore the best meetings and business events destination in Asia. Training and Human Resource Development has been and continues to be a cornerstone of SACEOS and is a strategic pillar for the association to help its members in the development of human capital – a core ingredient to be a successful meetings organization.

Professional development is important on many fronts, but has gained even more importance in a globalised context. The growing number of Certified Meeting Professional (CMP) in Singapore is an indication of SACEOS’ growing influence in the local meetings industry. SACEOS assists budding CMPs to accumulate CE (continuing education) clock hours for CMP certification or re-certification by offering the following courses with approved CE clock hours:

- Professional conference management (PCM): 24 CE clock hours;
- Professional exhibition management (PEM): 19.5 CE clock hours;
- Certified meeting professional (CMP) alignment workshop: 7 CE clock hours;
- Certified in exhibition management (CEM) licensed by IAEE: 6 CE clock hours per CEM module; and
- Singapore MICE Forum (SMF): 14 CE clock hours.

In the first three years, participants can attend foundation courses and industry conferences while clocking CE hours. After the third year, they can sit for international accreditation programmes (CEM and/or CMP) with their three years of working experience and sufficient CE clock hours. Upon earning the CEM and/or CMP designation(s), the individual is strongly encouraged to attend further accredited programmes in order to maintain his/her designation.

As Singapore’s meetings infrastructure development continues, the importance of service delivery is a priority. SACEOS works closely with the International Enterprise Singapore (IE Singapore) and the Singapore Exhibition & Convention Bureau (SECB), a division of the Singapore Tourism Board (STB). In 2001, SACEOS became the first meetings trade association in the world to launch a set of technical references.<sup>9</sup>

7 Society for Incentive Travel Excellence (n.d.), *2015 SITE Crystal Award Recipient for Most Effective Incentive Marketing Campaign*, SITE (online), available at: [www.siteglobal.com](http://www.siteglobal.com) (09-12-2016).

8 MSLGroup (2015), *MSLGroup in Asia wins 26 Stevie Awards at the 12th International Business Awards* (online), available at: [www.asia.msigroup.com](http://www.asia.msigroup.com) (09-12-2016).

9 Singapore Association of Convention and Exhibition Organisers and Suppliers (n.d), ‘About SACEOS’ (online), available at: [www.saceos.org.sg](http://www.saceos.org.sg) (09-12-2016).

### 4.5.1 SACEOS initiatives

The following SACEOS initiatives have helped in career development and raising professional standards among existing workforce:

1. **Partnering with the Nanyang Polytechnic (NYP) School of Business Management** for students to be matched with industry professionals for career and professional mentorship. NYP and SACEOS will also collaborate on the development of real business cases that will be integrated into the NYP curriculum.  
SACEOS also partnered with Republic Polytechnic and Singaporean event organizations on its “Inspire 360 Talent Development Programme.” The companies will mentor and involve the students actively in their events and projects to allow them to gain practical training and experience.  
SACEOS and the Singapore Institute of Technology’s MOU signed on 15 October 2016 means that both organizations are focusing strongly on providing first-class education to Singapore’s future leaders in the meetings industry;
2. Further **collaboration with Republic Polytechnic** to infuse two professional certifications offered by SACEOS into the curriculum: the Professional Conference Management (PCM) certification and Professional Exhibition Management (PEM) certification.  
These professional certificates will increase the employment prospects of Republic Polytechnic graduates wishing to enter into the meetings industry;
3. **MICE Open House** for more than 500 students from 15 institutions to meet with companies and professionals from the industry will give them more knowledge about careers in the meetings industry;
4. Conduct the **Certified Meeting Professional (CMP)** workshop and study groups for the industry to help prepare them for the CMP examination offered by Convention Industry Council (CIC).  
In addition, SACEOS’ partnership with Chicago-based Professional Convention Management Association (PCMA) gives SACEOS members the opportunity to participate in face-to-face CMP training in Singapore, along with an online programme to continue their preparation for the CMP exam;
5. SACEOS made it easier for companies to **acquire accredited Singapore Workforce Skills Qualification training** when it was appointed by the local Workforce Development Agency and Ministry of Manpower to act as a one-stop Enterprise Training Support (ETS) centre to administer and promote the ETS; and
6. SACEOS is the licensee training provider of the **Certified Exhibition Management (CEM) programme** in Asia and the Pacific awarded by IAEE – International Association of Exhibition & Events, United States of America.

---

## Chapter 5

# Overview of the meetings industry in Asia

### Summary

This chapter aims to be barometer of the meetings industry in Asia. The chapter starts with a SWOT analysis, selecting one key Strength, Weakness, Opportunity and Threat for each destination followed by an overview of its meetings industry segments – corporate incentive, association congress and exhibition. These destinations have varying levels of maturity within their meetings industry however they do have one common denominator – they all want to grow their market share of the meetings business. China and the Republic of Korea are discussed separately in the next two chapters.

### Key words:

- Association congress;
- Association meetings;
- Corporate incentives;
- Exhibitions;
- Market segments;
- MICE (meeting, incentive, conference and exhibition); and
- SWOT analysis.

### Key message:

Government nurturing, market expansion and destination capability development will be part of Asia's growth story.

Home to some of the world's largest economies, Asia is an attractive destination for meetings and business events as a result of government initiatives in numerous Asian destinations. At 6.5% annual growth over the last five years, the region has remained the fastest growing in the world. By comparison, developing countries outside Asia grew 3.4% and advanced countries 1.6% annually during the same period.<sup>1</sup> The Asian Development Bank's *Asian Development Outlook 2016* forecasts developing Asia will achieve GDP growth of 5.7% in 2016 and 2016 and continue to contribute 60% of world growth.<sup>2</sup>

Asian governments – at federal, provincial and city levels – have invested in meetings (commonly known as MICE (meeting, incentive, conference and exhibition) in this part of the world) as a niche offering within the tourism segment ("MICE tourism") for its capacity to shore in greater yields from the visitor economy. These governments also recognize that hosting international meetings is a vital form of global engagement for trade development and growing the nation's intellectual capital. Knowledge is a driver of productivity and economic growth, thereby leading to a new focus on the role of information, technology and learning in economic performance.

---

1 Zhuang, J. and Wignaraja, G. (2016), 'Asia growth pessimism is not warranted', 29-05-2016, *OECD Insights*, OECD (online), available at: [www.oecdinsights.org](http://www.oecdinsights.org) (09-12-2016).

2 Asian Development Bank (2016), *Asian Development Outlook 2016: Asia's Potential Growth* (online), available at: [www.adb.org](http://www.adb.org) (09-12-2016).



Asia competes for business visitors from within the region – its largest source – and from around the world. At the same time, Asia is also a valuable meetings source market, with China being the most sought after for its capacity to ‘export’ mega-size incentive groups. In fact, China has surpassed United States of America as the largest business travel market.<sup>3</sup> According to a joint report by technology firm Amadeus and the consultancy group Oxford Economics, Asia will account for just over half of the growth in global business travel in the next ten years.<sup>4</sup>

In the meantime, UFI Asia Pacific Regional Manager Mark Cochrane is of the opinion that Asia’s remarkable track record of growth looks likely to continue throughout 2016, thereby confirming Asia as one of the world’s most dynamic and fast growing exhibition markets.<sup>5</sup>

Government nurturing, market expansion and destination capability development will be part of Asia’s growth story.

This section offers an overview of the various meetings segments in key Asian destinations. Governments are focused on building knowledge and creative economies and they are adding meetings development strategies to their overall destination development. The performance of this industry in the various Asian destinations is at varying levels and intensities. This is mainly due to inherent conditions, the local scenario and government policies that can either give it a leg up or create a speed bump.

In selecting market overviews, the most active countries in East, South-East and South Asia are highlighted – those that tend to enjoy higher business levels and more focus in terms of business events industry engagement. However, it is important to understand that there are key industry leaders in other parts of Asia and that significant industry development will continue to occur throughout the region.

Countries outside of the Asia and the Pacific region, such as Kazakhstan are beginning the process of forming a national convention bureau, which suggests that Central Asian countries may begin to show a more active interest in pursuing business events. Also, beyond the obvious focus on the industry by countries like the United Arab Emirates, Qatar and Turkey. Oman has just opened the new Oman Convention and Exhibition Centre in Muscat and is looking to establish a national convention bureau. Other countries including Azerbaijan, Israel and Jordan are also seeking to develop national bureaus.

3 Global Business Travel Association Foundation (2016a), ‘China takes place as leading market in global business travel spend as India becomes fastest growing business travel market’, press release, 11-07-2016, *Global Business Travel Association Foundation* (online), available at: [www.gbta.org/foundation](http://www.gbta.org/foundation) (09-12-2016).

4 Amadeus (2014), ‘Amadeus report reveals Asia will drive a decade of sustained growth for the global travel industry’, press release, 03-04-2014, Amadeus (online), available at: [www.amadeus.com](http://www.amadeus.com) (09-12-2016).

5 The Global Association of the Exhibition Industry (2016b), ‘UFI releases new report on the Trade Fair Industry in Asia’, press release, 21-07-2016, UFI (online), available at: [www.ufi.org](http://www.ufi.org) (09-12-2016).



Table 5.1 Asian governments invest in the meetings industry

<b>Hong Kong</b>	<i>Connections:</i> links the booming economies of Mainland China and Asia with major markets worldwide.	<b>Macao, China</b>	<i>Integrated solutions:</i> capacity to offer all inclusive packages to big groups.
<b>Singapore</b>	<i>Reinvention:</i> experimental events and destination immersion.	<b>India</b>	<i>Gearing up:</i> new convention centres.
<b>Laos</b>	<i>Future ready:</i> actively leveraging on ASEAN Economic Community (AEC).	<b>China</b>	<i>Game changer:</i> although a later comer, is now challenging status quo.
<b>Taiwan Province of China</b>	<i>Trade alignment:</i> meet Taiwan under TAITRA.	<b>Republic of Korea</b>	<i>Multiple destinations:</i> state-of-the-art venues and dynamic PCOs.
<b>Indonesia</b>	<i>Aspiration:</i> newly formed INACEB has been promised funds for marketing and bidding.	<b>Japan</b>	<i>Internationalising:</i> formerly focused on its large domestic market, convention cities are gearing up for international customers.
<b>Malaysia</b>	<i>Expansion:</i> new centres and new bureaus in Johor, Sabah and Penang.	<b>Philippines</b>	<i>National Federation:</i> national association have formed Federation.

Source: GainingEdge.

SWOT analysis has been made for the following destinations: Cambodia; Hong Kong, China; India; Indonesia; Japan; Lao People's of Democratic Republic; Macao, China; Malaysia; Myanmar; Philippines; Singapore; Sri Lanka; Taiwan Province of China; Thailand and Viet Nam. China and the Republic of Korea are discussed separately in chapters 7 and 8 respectively.

## 5.1 Hong Kong, China

The true definition of “East meets West,” Hong Kong, China’s dynamic business culture is the successful fusion of its enterprising Chinese roots and international outlook. Hong Kong, China, is ranked second in Asia, and fourth globally in the Global Financial Centres Index as of March 2016,<sup>6</sup> thanks to the strength of its business environment, infrastructure and a favourable tax regime. The Hong Kong Tourism Board (HKTb) set up a dedicated office called Meetings and Exhibitions Hong Kong in November 2008. Additional funds have been earmarked for MEHK to raise Hong Kong, China’s profile in the meetings industry and to strengthen support for business events to be hosted in Hong Kong, China. In the first quarter of 2016, there were around 314,000 overnight business arrivals to the city, similar to the same period last year. In 2015, both AsiaWorld-Expo and the Hong Kong Convention and Exhibition Centre were once again listed in the top-3 “Best Convention and Exhibition Centre” in the CEI Asia Industry Awards.<sup>7</sup>

Hong Kong, China, leads in the trade show or exhibitions industry in this part of the world. Despite global uncertainties, Hong Kong, China’s role as a stable, reliable business platform and networking base for buyers and sellers from around the world is reinforced. It is quite clear that trade exhibitions in Hong Kong, China, play a very important role as trading hubs for Asia and

6 Choudhury, S.R. (2016) ‘Singapore ranks third in the Global Financial Centres Index, beats Hong Kong’, *CNBC*, 08-04-2015 (online), available at: [www.cnbc.com](http://www.cnbc.com) (09-12-2016).

7 Government of Hong Kong (2016), *Hong Kong: The Facts – Tourism* (online), available at: [www.gov.hk/en](http://www.gov.hk/en) (09-12-2016).

one of the most important business platforms for overseas companies wishing to promote their products and services to customers in Mainland China.

According to the Hong Kong Trade Development Corporation (HKTDC), as of April 2016, the total available exhibition space in Hong Kong, China, now exceeds 150,000 m<sup>2</sup>. In 2015, Hong Kong, China, hosted more than 100 exhibitions, and in excess of 1.7 million overseas overnight meetings visitors.<sup>8</sup> By end March 2016, there were 257 hotels offering 74,000 rooms. The Land Sale Programme in the 2016/2017 fiscal year showed that there will be another three sites for hotel development within the hotel belt of the Kai Tak Runway Precinct, thereby adding some 2,100 rooms.<sup>9</sup>

An economic impact study commissioned by the Hong Kong Exhibition & Convention Industry Association (HKECIA) said that the exhibition industry contributed HKD 52.9 billion (USD 6.8 billion) to Hong Kong, China's economy in terms of expenditure in 2014, which is equivalent to 2.3% of the city's total GDP. This represents a 29% increase from the previous study covering 2012. According to the study, the industry's compound annual growth rate was 13.9%.<sup>10</sup>

In 2014, the number of exhibiting companies increased by 6.5% to reach 66,164. The number of exhibition visitors grew 5.8% to 1.9 million, and the numbers of international and regional visitors increased by 9.9% and 9.6% respectively.<sup>11</sup>

### 5.1.1 Hong Kong, China, SWOT snapshot and market segments

Strength	Weakness
Accessible visa system which allows foreign meetings visitors based in the city to visit Guangdong Province – China's largest provincial economy – for up to six days (144 hours).	Strong competition from other Chinese cities including Macao, China.
Opportunity	Threat
As a Special Administrative Region of China, Hong Kong enjoys a highly active and cooperative business relationship with Mainland China. Rising demand for knowledge, technology and expertise among China's emerging middle class makes Hong Kong, China, the perfect place to generate showcasing, information-sharing and networking opportunities within Mainland China.	Limited number of new venues and limited capacity to expand and grow meetings infrastructure.

<sup>8</sup> Hong Kong Trade Development Corporation Research (2016), 'Convention and Exhibition Industry in Hong Kong', *Hong Kong Trade Development Corporation Research*, 13-04-2016 (online), available at: [www.research.hktdc.com](http://www.research.hktdc.com) (09-12-2016).

<sup>9</sup> Government of Hong Kong (2016), *Hong Kong: The Facts – Tourism* (online), available at: [www.gov.hk/en](http://www.gov.hk/en) (09-12-2016).

<sup>10</sup> Asia News (2016), 'Study: Hong Kong's exhibition industry generated US\$6.8 billion in 2014', *Trade Show News Network*, 23-08-2016 (online), available at: [www.tsn.com](http://www.tsn.com) (09-12-2016).

<sup>11</sup> Hong Kong Trade Development Corporation Research (2016), 'Convention and Exhibition Industry in Hong Kong', *Hong Kong Trade Development Corporation Research*, 13-04-2016 (online), available at: [www.research.hktdc.com](http://www.research.hktdc.com) (09-12-2016).

## Corporate incentive

The Hong Kong–Zhuhai–Macao Bridge which is anticipated to be completed by end 2017/2018 will make Hong Kong, China, an attractive proposition for meeting groups in the Pearl River Delta region. While Guangzhou will perhaps be taking a bigger slice of the pie due to its relative lower cost, nonetheless Hong Kong, China, will benefit from this infrastructure development which will open up the opportunity for organizers to put together new multi-destination itineraries. Over the next six years, around 150 major infrastructure projects will mesh the transport, energy, water and telecommunications networks of the nine cities in South China together and “turn the Pearl River Delta into One”.

Hong Kong, China, offers many unique venues and experiences for incentive groups, ranging from panoramic vistas of Victoria Harbour, to elegant dining at avant-garde restaurants; and from mountain top meals at The Peak Lookout to floating-in-style dinner and dance events on harbour cruises.

## Association congress

Hong Kong, China, will continue to focus on high-growth markets and industry sectors including science, medical science, engineering, social science, technology and commerce. In 2016, the city hosted the Million Dollar Round Table for the second time since 2004. More than 8,500 delegates from 35 countries attended this premier event for financial professionals.

The city’s main convention and exhibition venues include the Hong Kong Convention and Exhibition Centre (HKCEC) in the main business district, the AsiaWorld-Expo (AWE) near the airport and the Hong Kong International Trade and Exhibition Centre in Kowloon Bay.

### Upcoming association meetings:

- Critical Communications World 2017 incorporating the 19th Tetra World Congress (estimate 3,311 pax)
- 23rd International Conference on Oral and Maxillofacial Surgery – April 2017 (estimate 1,524 pax)
- 33rd Congress of the Asia Pacific Academy of Ophthalmology – February 2018 (estimate 5,384 pax)

## Exhibition

Hong Kong, China, is one of the world’s most developed cities in terms of its financial infrastructure, quality of infrastructure, transportation and venues, accessibility and role as gateway to China. HKECIA revealed that in 2014, the exhibitions industry provided around 83,500 full-time jobs within the industry and in supporting sectors including hotel, food and beverage (F&B), retail, stand design and construction, and logistics and freight forwarding.<sup>12</sup>

<sup>12</sup> Asia News (2016), ‘Study: Hong Kong’s exhibition industry generated US\$6.8 billion in 2014’, *Trade Show News Network*, 23-08-2016 (online), available at: [www.tsn.com](http://www.tsn.com) (09-12-2016).

With the tight supply of exhibition spaces at HKCEC and AWE during peak seasons, the government commissioned a consultancy study in 2014 to assess the demand for convention and exhibition facilities in Hong Kong, China, over the next 15 years. One of the recommendations made by the consultancy study is to construct new facilities. In the 2015 Policy Address, the Chief Executive announced that the government will consider constructing a new convention centre above the Exhibition Station of the Shatin to Central Link around 2020. For now, to tackle the shortage of space at HKCEC during the peak seasons, the government since 2009 has promoted “one show, two locations” approach – holding one show in both HKCEC and AWE.<sup>13</sup>

A report from the Association of German Trade Fair Industry (AUMA) has ranked organizers worldwide with turnovers exceeding EUR 100 million (USD 111 million) in 2014. Three Asian exhibition organizers made the list – Hong Kong Trade Development Council (Hong Kong, China), SNIEC Shanghai (China), and Tokyo Big Sight (Japan).<sup>14</sup>

### 5.1.2 Hosting the region's association community

The Center for Association Leadership (ASAE) is a membership organization of more than 21,000 association executives and industry partners representing 10,000 organizations. Its members manage leading trade associations, individual membership societies and voluntary organizations across the United States of America and in nearly 50 countries around the world. In 2015, ASAE expanded its conference into Asia with the first-ever international event “ASAE's Great Ideas in Association Management Conference Asia-Pacific” and selected Hong Kong, China, to host its first conference outside of North America.

The two-day event included learning labs, networking receptions, and cultural experiences. The content of the conference focused on association management, with more than two-thirds of the conference presenters coming from the Asia and the Pacific region. The conference was a great opportunity for association executives in the region to connect and network with their peers from across the globe. For the associations based in the United States of America, this was the opportunity to expand their operations with their meetings, membership, and product and services.

## 5.2 India

India has emerged as the world's number one destination for foreign direct investment in 2015 ahead of China and the United States of America, according to a report by the Financial Times' FDI Intelligence Unit.<sup>15</sup> India is anticipated to jump four spots to become the world's sixth largest corporate travel market in the next five years, based on forecasts in a Visa-sponsored report by

13 Hong Kong Trade Development Corporation Research (2016), 'Convention and Exhibition Industry in Hong Kong', *Hong Kong Trade Development Corporation Research*, 13-04-2016 (online), available at: [www.research.hktdc.com](http://www.research.hktdc.com) (09-12-2016).

14 Association of the German Trade Fair Industry (2015), 'Five German exhibition companies among the Top 10 worldwide', press release, 07-09-2015, Association of the German Trade Fair Industry (online), available at: [www.auma.de/en](http://www.auma.de/en) (13-12-2016).

15 Panda, A. (2016), 'India takes over from China as Top Global FDI destination in 2015', *The Diplomat*, 25-04-2016 (online), available at: [www.thediplomat.com](http://www.thediplomat.com) (09-12-2016).

the Global Business Travel Association (GBTA) Foundation. GBTA also expects India to surpass Brazil in 2016 and surpass both the Republic of Korea and Italy in 2017.<sup>16</sup>

India was one of the few Asian countries, which started developing its infrastructure for hosting meetings and business events in the 1950s, starting with the Vigyan Bhawan in 1956. India went on to host the first Asian Relations Conference in March 1947 and the inaugural edition of the Asian Games in 1951 was held in New Delhi.

In an earlier joint study by the India Convention and Promotion Bureau (ICPB) and the Indian Institute of Management Bangalore (IIMB) "India as a Global Conventions Destination: Prospects and Strategies", it was noted that business tourism (as termed in this report) contributed to at least 2.2% of India's GDP.<sup>17</sup>

Industry observers are hopeful that the Indian government will approve a proposal from the Ministry of Tourism to allow e-visas for international visitors attending conferences and meetings in India. Currently the visa approval for conference delegates takes a longer processing time and the conference must be organized by a government agency or an entity recognized by one of the key departments of the Indian government. The conference must have sought approval from the Ministry of Home Affairs to host the event.<sup>18</sup>

### 5.2.1 India SWOT snapshot and market segments

Strength	Weakness
India became the fastest growing economy in the world in 2015 with 7.4% <sup>19</sup> and its share of meetings is set to increase with the development of India as a major hub of economic activity in Asia and the world.	Concerns over infrastructure, – transport and accommodation to meet demand.
Opportunity	Threat
India has an excellent opportunity to benefit from visa reforms and infrastructure improvements under the new government.	Facilitation (conference visa requirements), the shortage of hotel rooms and administrative processes makes India less competitive.

16 Global Business Travel Association Foundation (2016c), 'India poised to be top six business travel market by 2019', press release, 13-07-2016, Global Business Travel Association Foundation (online), available at: [www.gbta.org/foundation](http://www.gbta.org/foundation) (09-12-2016).

17 Shainesh, G. et al. (n.d.), 'India as a Global Conventions Destination: Prospects & Strategies', Indian Institute of Management Bangalore and India Convention Promotion Bureau.

18 CIM Global (2016), 'New e-visa for India conference delegates could be game-changer', *CIM Global*, 08-09-2016 (online), available at: [www.cimglobal.net](http://www.cimglobal.net) (09-12-2016).

19 Khan, M. (2016), 'Growth star India overtakes China as world's fastest growing major economy', *The Telegraph*, 08-02-2016 (online), available at: [www.telegraph.co.uk](http://www.telegraph.co.uk) (09-12-2016).

Corporate incentive

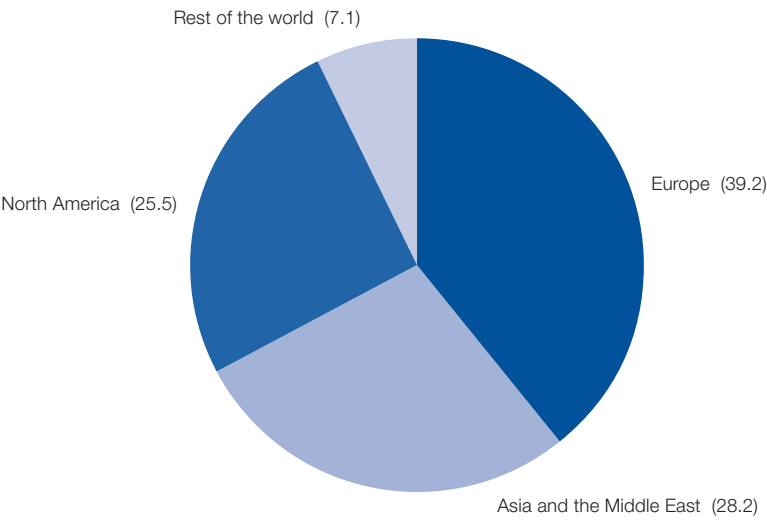
India’s status as an important market and source of knowledge in pharmacy, IT and insurance is expected to draw meetings. The government’s “Make In India” business initiative which encourages companies to manufacture in India, is expected to catalyse international meetings growth. When Air India’s first direct flight from New Delhi to San Francisco took off, it opened up vistas of a substantial demand for incentive visits to and from northern California. San Francisco and the Bay Area already receive substantial Indian business visitors and corporate meetings.

India’s economic growth accelerated in 2015 reaching an average of 7.3% for the fiscal year, meaning the 7th largest economy registering the fastest GDP growth rate in the world. “The Government’s attempt to improve the ease of doing business in India combined with positive economic sentiment and globalization has resulted in the acceleration of growth in business travel to the country,” said TR Ramachandran, Group Country Manager India and South Asia, Visa.<sup>20</sup>

Association congress

In 2015, ICCA had placed India at the 35th position in the worldwide rankings and ninth position in the Asia and the Pacific region. Delhi, Hyderabad, Mumbai, Bengaluru, Chennai, Kolkata, Goa, Chandigarh, Jaipur and Cochin were the major cities which hosted various meetings.

Figure 5.1      Headquarters of international associations organizing meetings in India (%)



Note: The country sub-regions for figure 2.1 and figure 5.1 pertain to that of ICCA and differ from the UNWTO five regions (Africa, Americas, Asia and the Pacific, Europe and the Middle East). Refer to annex I for the full information on ICCA breakdown of sub-regions.

Source: Based on International Congress and Convention Association – ICCA (2016), *ICCA Destination Comparison Report, India*, July 2016 (online), available at: [www.iccaworld.com](http://www.iccaworld.com).

20 Global Business Travel Association Foundation (2016c), ‘India poised to be top six business travel market by 2019’, press release, 13-07-2016, Global Business Travel Association Foundation (online), available at: [www.gbta.org/foundation](http://www.gbta.org/foundation) (09-12-2016).

The graphic above presents the number of events per year divided by home region of the headquarters of the international associations who organizes the event. Only the headquarters of international associations whose addresses are known by ICCA are included.

Most association meetings won by India are those with headquarters based in Europe and in Asia and the Middle East. This indicates that there is great interest to host meetings in India. Currently, conference delegates are not allowed to apply for short-term business visit visas which are available to corporate business travellers. The new e-visa facilitation, if it materialises, will mean a more robust meetings industry for India.

While New Delhi hosts the majority of international association meetings occurring in India, Hyderabad leads in terms of average group size. The Hyderabad International Convention Centre (HICC) is India's first purpose-built convention facility and winner of the prestigious Best Standalone Convention Centre' National Tourism Award conferred by the Ministry of Tourism, for five years, reinforcing the city's status as a leading meetings destination in India.

Table 5.2 International association meetings in India, 2006–2015

	Number of meetings	Estimated number of participants	Average number of participants
New Delhi	422	188,428	442
Hyderabad	141	87,584	624
Mumbai	147	53,775	383

Source: International Congress and Convention Association – ICCA (2016), *ICCA Destination Comparison Report, India*, July 2016 (online), available at: [www.iccaworld.com](http://www.iccaworld.com).

#### Upcoming association meetings:

- 12th World Congress of the International Academy of Cosmetic Dermatology, May 2017, Bangalore (estimate 1,319 pax)
- 19th World Congress of the International Union of Food Science and Technology, August 2018, Mumbai (estimate 2,000 pax)
- 36th International Geological Congress, March 2020, New Delhi (estimate 4,277 pax)

## Exhibitions

India showed the fastest growth in the Asia and the Pacific region in 2015, according to UFI's Trade Fair Industry in Asia report. Growth was recorded at 7.8% over 2014, making India the third largest trade fair market in Asia after China and Japan.<sup>21</sup> From roadways, railways to airports and other smart-city initiatives, the last few years have witnessed a phenomenal growth in this sector in India. Trade shows in the construction and infrastructure space are anticipated to ride the wave. As an example, the Concrete Show India will help bring in new technologies from Indian and global suppliers and manufacturers for the industry which will add value to new projects being initiated at state level. The expo was well received by the industry at large with support from the Indian

21 The Global Association of the Exhibition Industry (2016b), 'UFI releases new report on the Trade Fair Industry in Asia', press release, 21-07-2016, UFI (online), available at: [www.ufi.org](http://www.ufi.org) (09-12-2016).



Concrete Institute (ICI), Builder Association of India (BAI), Association of Consulting Civil Engineers (India) (ACCE), Indian Society of Structural Engineers (ISSE), The Institute of Engineers India (IEI), Indian Association of Structural Engineers (IAstruct), Indian Institute of Bridge Engineering (IIBE), Cement Manufacturers Association (CMA), Construction Chemicals Manufacturers Association (CCMA) and Ready Mixed Concrete Manufacturers' Association (RMCMA). The expo also includes a series of knowledge sessions with industry speakers.<sup>22</sup>

## 5.2.2 The “Happening Hyderabad” Campaign

The Hyderabad Convention & Visitors Bureau (HCVB) is a member of the Global Science & Convention Alliance (GSCA) of city convention bureaus. This alliance, comprising Hyderabad, Daejeon, Adelaide, Toulouse, Prague, and Oslo can boast about their strengths in scientific innovation and research, and share a common goal of targeting science conventions.<sup>23</sup> In addition to its science credentials, over the years, Hyderabad has positioned itself as the convention capital of India. It is a major technology hub and is growing in importance when it comes to technology talent. Hyderabad is home to several big-name marquee investors including Apple, Google, Amazon, Microsoft, Boeing and TATA Aerospace. Businesses which have chosen Hyderabad to set up office do so because the city offers a business friendly environment with a proactive and progressive government along with socio-cultural diversity. Additionally, Hyderabad also focuses on healthcare, pharmaceutical and biotechnology sectors which are the city's strongest suits.

Hyderabad also has homegrown meetings, festivals, and many events related to sports, hobby, leisure, art and culture. Telangana Tourism launched the “Happening Hyderabad” campaign to focus on a year-round calendar of events with a particular focus on helping local events in the IT and communications sector (for example, HYSEA Annual IT Summit – Hyderabad Software Enterprises Association) grow and achieve international stature. With inspiration from DMAI's DestinationNEXT study<sup>24</sup> where successful destinations are those who strongly involve their local communities – be it their politicians, media, the general public, or professional bodies – the “Happening Hyderabad” campaign focuses on interacting with and involving their communities to contribute to a year-long calendar of events. In this way, professionals can showcase their events and promote to a larger audience while being part of the events medium that will build Brand Hyderabad.

According to the IdentCITY project manager, at the end of twelve months, there was an increase of 25% in local events and festivals as a result of the Telangana government's assistance in terms of venue support, official permissions and creating an event ecosystem. Hyderabad managed to attract reputable entertainment and technology events like the International Indian Film Academy Awards (South Edition), Sunburn festival, Sensation (world's largest dance festival) and Campus Party which has been described as a “technological festival of innovation, creativity, science, digital entertainment and entrepreneurship” – their first edition in Asia – plus the 2018 World Congress on Information Technology.

22 UBM India (2016), 'UBM India announces the 4th edition of Concrete Show India', media release, 26-04-2016, UBM India (online), available at: [www.ubmindia.in](http://www.ubmindia.in) (09-12-2016).

23 For more information: Global Science and Convention Alliance website available at: [www.globalsciencealliance.com](http://www.globalsciencealliance.com), (10-12-2016).

24 Destination Marketing Association International (n.d.).



For the first time in India, the Telangana Chamber of Event Industry (TCEI), an events industry association was formed. TCEI is working on various education and promotional activities of Hyderabad and they are also introducing awards to encourage quality of conventions and events.<sup>25</sup>

Hyderabad will host the 14th Asia-Oceania ORL-HNS Congress 2019 which will coincide with the 71st Annual Conference of Otolaryngologists of India. The bid was won by the Association of Otolaryngologists of India and the Asia Oceania Association of Otorhinolaryngology-Head and Neck Surgery Societies. More than 5,000 delegates are expected at the event. In 2016, it will host eleven international and regional conventions including the International Congress on Infectious Diseases and the World Stroke Congress.<sup>26</sup>

### 5.3 Indonesia

Indonesia benefits from its strategic location near many of the world's most dynamic emerging markets, relatively low costs and good conference facilities, as well as the strength and size of the domestic market.

The Ministry of Tourism is aiming to attract up to 12 million international visitors by the end of 2016, getting closer to the goal set by President Joko Widodo to attract 20 million international visitors by 2019. In 2015, Indonesia managed to attract up to 10 million<sup>27</sup> international visitors and also saw its "Wonderful Indonesia" brand take 49th place<sup>28</sup> in a ranking of the world's most valuable national travel campaigns. A preliminary survey by the Ministry of Tourism and Statistics Indonesia showed that meetings contributed 9% of domestic travel movements.

Indonesia recently established its Indonesia Convention and Exhibition Bureau – INACEB. As a non-profit, independent private organization, INACEB will partner the Ministry of Tourism in supporting the Wonderful Indonesia campaign. INACEB aims to achieve two million business visitors by 2019. Indonesia Tourism Minister Arief Yahya was reported to have pledged USD 10 million to be used in lobbying for meetings, on top of the USD 46.2 million the ministry had allocated for the bureau's operational, bidding and delegate boosting efforts this year.<sup>29</sup> Through INACEB, the ministry hopes to elevate Indonesia's ICCA Rankings in Asia, currently ranked at eleventh place, to eighth place by 2019, and a 10% growth in its meetings industry.

By then, Indonesia hopes that 150 international association meetings as qualified by ICCA would take place on its shores. In 2015, Indonesia hosted 78 such meetings. Only around 3% of the 8.8 million foreign tourists in 2013 were meetings visitors said the Tourism Ministry (then known as Tourism and Creative Economy Ministry).

25 Telangana Tourism (n.d), 'Happening Hyderabad' (online), available at: [www.telanganatourism.gov.in](http://www.telanganatourism.gov.in) (09-12-2016).

26 International Congress and Convention Association – ICCA (n.d.), *Association Database*, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (05-08-2016).

27 Embassy of the Republic of Indonesia (2016), 'Tourism Minister: 10.4 million foreign visitors arrivals in 2015: Indonesia exceeds target', press release, 08-02-2016, Embassy of the Republic of Indonesia (online), available at: [www.embassyofindonesia.org](http://www.embassyofindonesia.org) (10-12-2016).

28 Coconuts Jakarta (2015), 'Wonderful Indonesia ranked 47th best tourism brand in the world', press release, 04-08-2015, Coconuts Jakarta (online), available at: [www.coconuts.co/jakarta](http://www.coconuts.co/jakarta) (10-12-2016).

29 Hudoyo, M. (2016), 'Bigger budget, more challenging targets for Indonesia MICE', *TTG Asia*, 06-04-2016 (online), available at: [www.ttgasia.com](http://www.ttgasia.com) (10-12-2016).

Today, there are 16 designated MICE cities across the archipelago. Investment in the Batam hotel industry is showing notable growth particularly after its status as a MICE city was announced. Aggressive expansion plans which include accommodation projects, airport development and expansion, convention facilities and enhanced tourist attractions are underway to build the infrastructure to support meetings in all these cities.

### 5.3.1 Indonesia SWOT snapshot and market segments

Strength	Weakness
Indonesia's population is expected to reach 366.5 million by 2050, which according to recent data from the Population Reference Bureau (PRB), will see it become the world's fifth most populous country. It is appealing to investors and especially exhibition producers with international exhibition organizers looking for partnerships with Indonesian corporations.	Except for Jakarta and Bali, there is limited air access and ground transportation in some MICE cities. Port accessibility for heavy equipment exhibitions and custom clearance regulations hinder exhibitions growth and product launches.
Opportunity	Threat
The development of its MICE cities is aligned with the nation's Economic Corridors and their industries as identified in the MP3EI (Master Plan for Acceleration and Expansion) on Indonesia's Economic Development 2011–2025. Indonesia aims to be one of the ten major world economies by 2025.	There are varying levels of international service in some provincial areas. It is generally accepted that at present, there are only five regions in Indonesia that have suitable infrastructure to host international-level meetings, namely Jakarta, Bali, Surabaya, Bandung and Yogyakarta. New competitor Asian cities are numerous.

### Corporate incentive

Results from a recent global Destination Index,<sup>30</sup> compiled by Pacific World and ACCESS Destination Services, have identified Thailand, Indonesia and Singapore as the top countries in Asia for meetings and incentives. Bangkok and Bali have been voted as the most popular cities, and meetings and incentives being the most requested event types in Singapore. Governmental stability, attractive exchange rates and improved flight connections were quoted as factors contributing to the increased attention from source markets including North America, Australia and other Asian regions.

One of the 34 provinces of the Republic of Indonesia, the tropical island of Bali is arguably Indonesia's single destination of universal recognition, contributing up to 40% of all foreign visitors to the archipelago annually. It is also increasingly popular as a meetings destination – the most popular among Indonesian cities – and is well positioned to handle international business groups. Bali is a favourite destination for incentive groups, offering scuba diving, sailing, rafting and surfing as team building and sporting activities in addition to showcasing its culture. The island's diverse districts and offerings give meeting planners a chance to showcase unique itineraries that

30 Pacific World (2016), 'Pacific World global Destination Index report identifies Thailand, Indonesia and Singapore as Top Destinations for meetings and incentives in Asia', Pacific World, 10-02-2016 (online), available at: [www.pacificworld.com](http://www.pacificworld.com) (10-12-2016).

will create unforgettable experiences. It has two major convention centres located within the Bali Tourism Development Centre complex in Nusa Dua, and boasts an impressive range of fine-dining restaurants and international hotels and resorts. Its Ngurah Rai International Airport received a major upgrade when Bali hosted the 2013 APEC Summit.

### Association congress

A relatively inactive association community in Indonesia and the lack of engagement in international industry associations are obstacles in Indonesia hosting more association congresses. According to ICCA Data<sup>31</sup> as of 19 July 2016, there are only 14 international associations who have an Indonesian as a key contact person (who could be a decision maker or influencer, or holding a senior position in the association). In contrast, there are 66 in Malaysia, 98 in Singapore, 46 in Thailand and 45 such key persons in the Philippines. There is potential for Indonesia to improve this situation through a local association development programme similar to those pursued by its regional competitors.

#### Upcoming association meetings:

- 15th Asia Teaching English as Foreign Language International Conference, July 2017, Yogyakarta (estimate 864 pax)
- 19th Teochew International Convention, Oct 2017, Jakarta (2,500 pax)
- 20th Congress of the International Confederation of Plastic, Reconstructive and Aesthetic Surgery, 2019, Bali (estimate 2,769 pax).

### Exhibition

According to UFI, in 2015, Indonesia's exhibition industry in terms of space sold grew by 7.4% compared to 9.2% the previous year.<sup>32</sup> Nonetheless, despite this drop in growth, Indonesia's huge population and healthy economy attracts exhibitions. Many international exhibition organizers have set up offices here, bringing new exhibitions into the country. New facilities like the Indonesia Convention & Exhibition (ICE) – which added 50,000 m<sup>2</sup> to the inventory, will open new opportunities for events in the country.

Big names in international exhibitions such as event organizers based in the United Kingdom like UBM or Tarsus Group and Thailand-based CMO Group have formed partnerships with local players to tap into Indonesia's growing exhibition and conference businesses. The world's leading event and exhibition organizer Reed Exhibitions has signed a cooperation agreement with Panorama Group, one of Indonesia's largest travel and tour operators, to establish a joint venture which will operate under the name Reed Panorama Exhibitions. By forging a partnership with international players, local event organizers are able to further strengthen their footholds in both local and overseas markets.

31 International Congress and Convention Association – ICCA (n.d.), *Association Database*, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (05-08-2016).

32 The Global Association of the Exhibition Industry (2016a), *The Trade Fair Industry in Asia*, UFI [electronic], 12, pp. 21 and 81, available at: [www.ufi.org](http://www.ufi.org) (10-12-2016).

As the market still has potential to grow, international show producers will consider either launching new shows or cloning new events. Consumer shows serving Indonesia's large population are plentiful while the B2B trade exhibitions are still underserved and under capacity.

Despite the global exhibitions market experiencing a slowdown in 2015, the Indonesian tradeshow market continues to accelerate, offering lucrative opportunities for international organizers and investors, as reported by *Globex 2016: the global exhibition organising market: assessment and forecast to 2020*, study produced annually by AMR International.<sup>33</sup> "Indonesia is an underserved market that shows no signs of slowing," said Diana Gineva, editor of Globex 2016.<sup>34</sup> "Since 2011, Indonesia has grown close to 13% CAGR with further growth of 16% CAGR forecast to 2020. This acceleration is largely driven by Indonesia's growing middle class in infrastructure improvements, such as the expansion of exhibition venue space. Jakarta hosts 90% of international shows in Indonesia", she added.

### 5.3.2 Bali: risk management planning

Bali is especially an attractive destination for spa and wellness tourism thanks to its skilled local therapists, abundant local ingredients for spa products and its natural landscape, with many spas offering services in unique, natural settings such as by the sea or in the jungle. However, this island is not just about self-indulgence and pampering and showed off its business side when it hosted the 23rd Conference on Industrial Engineering & Engineering Management; the 7th Asian Mathematical Conference and the 29th annual meeting of the Asia Pacific Association of Cataract and Refractive Surgeons. According to ICCA Data as of 2 August 2016, of the 52 international association meetings that are scheduled in Indonesia in 2016, Bali hosts the majority with 23 meetings<sup>35</sup>.

Indonesia sits between the world's most active seismic region – the notorious Pacific Ring of Fire or the world's greatest earthquake belt. In June 2016, an earthquake of magnitude 6.2 struck off the island of Lombok and briefly startled tourists on Bali. One year earlier, holidaymakers were stranded for days in Bali when a volcanic ash cloud forced the closure of Ngurah Rai International Airport. This scenario was repeated in August 2016 when Indonesian authorities closed an airport on Lombok due to volcanic activity at the island's Mount Rinjani, while airlines cancelled or diverted flights to and from Bali due to volcanic ash.

To manage future risks and to be in a state of preparedness, the Bali administration proposed the instalment of additional tsunami sirens to the National Disaster Mitigation Agency and the Meteorology, Climatology and Geophysics Agency. The sirens are needed to warn people early so evacuations can be carried out efficiently.

33 AMR International (2016), *Globex 2016 – The global exhibitions organising market: assessment and forecast to 2020* (online), available at: [www.amrinternational.com](http://www.amrinternational.com) (10-12-2016).

34 Asia Exhibition News (2016), 'Network Global Exhibitions Market looks to Indonesia for lucrative growth opportunities', Trade Show News Network, 06-09-2016 (online), available at: [www.tsn.com](http://www.tsn.com) (10-12-2016).

35 International Congress and Convention Association – ICCA (n.d.), Association Database, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (05-08-2016).

Many hotels on the island also serve as evacuation shelters. Once a tsunami is predicted to occur, people in nearby areas will be evacuated to the hotels. At least 32 hotels across Bali have been certified for their readiness to handle disasters. Building quality is among indicators rated in the certification process. While not all hotels are certified, some already have trained staff who will be able to evacuate guests to safer ground efficiently, while other hotels have been identified as those of sufficient height to serve as vertical evacuation centres. Additionally, some hotels have their own procedures to supplement the Tsunami Ready training including training staff members to spot the warning signs of a tsunami.

The Bali Hotels Association (BHA) is one of the drivers of this important project working closely with the local authorities. The association takes security and safety issues seriously and is active in a wide range of areas, from counter terrorism to crime prevention to natural disaster preparedness. The 'Tsunami Ready Toolbox' a joint development of BHA, the Indonesian Ministry of Tourism, and the Centre for International Migration and Development is the basis for the tsunami readiness of BHA hotels. The document can be downloaded free of charge.<sup>36</sup>

## 5.4 Japan

In 2013, the Japan Tourism Agency (JTA) which is under the purview of the Ministry of Land, Infrastructure, Transport and Tourism launched its Japan Global MICE Cities project, identifying Tokyo, Yokohama, Kyoto, Kobe, Fukuoka, Osaka and Nagoya as the convention cities who will be given technical support to be international market ready.

The Japan National Tourism Organization's (JNTO) goal is to make Japan the most popular convention destination in Asia by 2030<sup>37</sup> and JTA has set three pillars for the MICE sales and promotion, one of which is the Global MICE Cities Project. The Global MICE Cities Project has been developed to assess and provide recommendations to address critical success factors which includes the capabilities of the convention bureau their relationships with the private sector members, and the level of support from their city governments. These cities were later joined by Sapporo, Hiroshima, Chiba, Kitakyushu and Sendai in a follow-up project.

This approach allows the Japan Convention Bureau (JCB) to identify the cities' strengths and how to support their bids. Japanese cities offer top-class settings for international meetings while also promising unique cultural experiences. Linking conventions to cities with strengths in their fields is a way of using Japan's knowledge hubs to attract international conventions to the country.

<sup>36</sup> Alexander, K. (2008), *Tsunami ready toolbox* (online), available at: [www.preventionweb.net](http://www.preventionweb.net) (10-12-2016).

<sup>37</sup> Nagata, K. (2016), 'Japan ranked most popular spot for international conferences in Asia for fourth consecutive year', *The Japan Times*, 02-06-2016 (online), available at: [www.japantimes.co.jp](http://www.japantimes.co.jp) (10-12-2016).

Table 5.3 Regional industries and research in Japan's Global MICE Cities

City	Regional industry	City	Regional industry
<b>Chiba</b>	<ul style="list-style-type: none"> <li>– Medicine: radiology and cancer treatment;</li> <li>– Robotics; and</li> <li>– Logistics.</li> </ul>	<b>Nagoya</b>	<ul style="list-style-type: none"> <li>– Automobiles and transportation systems;</li> <li>– Aircraft;</li> <li>– Medicine: medical equipment manufacturing; and</li> <li>– Ceramic products.</li> </ul>
<b>Fukuoka</b>	<ul style="list-style-type: none"> <li>– Renewable energy;</li> <li>– IT and content industries; and</li> <li>– Organic electro-luminescence.</li> </ul>	<b>Osaka</b>	<ul style="list-style-type: none"> <li>– Medicine: regenerative medicine and rehabilitation;</li> <li>– Engineering and robotics; and</li> <li>– New energy.</li> </ul>
<b>Hiroshima</b>	<ul style="list-style-type: none"> <li>– Manufacturing;</li> <li>– Sport;</li> <li>– Fisheries and aquaculture; and</li> <li>– Peace.</li> </ul>	<b>Sapporo</b>	<ul style="list-style-type: none"> <li>– Medicine: psychiatry, dementia; care and treatment of lifestyle diseases;</li> <li>– Media arts; and</li> <li>– Environment and energy.</li> </ul>
<b>Kitakyushu</b>	<ul style="list-style-type: none"> <li>– Environmental industries;</li> <li>– Industrial technologies;</li> <li>– Automotive; and</li> <li>– Engineering.</li> </ul>	<b>Sendai</b>	<ul style="list-style-type: none"> <li>– Medicine: medical equipment manufacturing; and</li> <li>– Disaster prevention and disaster risk reduction.</li> </ul>
<b>Kobe</b>	<ul style="list-style-type: none"> <li>– Medicine: regenerative medicine and rehabilitation;</li> <li>– Computational science and graphics;</li> <li>– Technology; and</li> <li>– Disaster risk management</li> </ul>	<b>Tokyo</b>	<ul style="list-style-type: none"> <li>– Medicine: drug discovery and life sciences;</li> <li>– Finance;</li> <li>– Energy: hydrogen society; and</li> <li>– SME clusters.</li> </ul>
<b>Kyoto</b>	<ul style="list-style-type: none"> <li>– Medicine: life innovation;</li> <li>– Green innovation; and</li> <li>– Tourism and culture.</li> </ul>	<b>Yokohama</b>	<ul style="list-style-type: none"> <li>– Medicine: drug discovery, regenerative medicine and medical equipment manufacturing; and</li> <li>– Smart cities.</li> </ul>

In addition to a highly developed manufacturing sector and advanced technologies, Japan's underlying strength in hosting international conferences – in both the international association congress and corporate meetings segments – is the result of its trifecta of (a) industry size; (b) Japan as a leading research and development (R&D) nation; and (c) the width and depth of its academic communities in Japanese universities and institutions of higher learning (24 Nobel Prize winners).

The Japanese medical industry is one of the most developed in Asia with various Japanese cities as centres of ground-breaking research and development.

### 5.4.1 Japan SWOT snapshot and market segments

Strength	Weakness
Japan's strong base for headquarter offices, unrivalled R&D/innovative environment, strong educational institutions and highly educated workforce will continue to be strong drivers in attracting meetings relating to Japan's fields of specialisation and industry strengths.	Rooms and venues shortage especially during peak season. Competition from the highly popular weddings market.
Opportunity	Threat
Convention cities being groomed to be ready for the international market through the Japan Global MICE Cities Project which reviews key success factors and plug gaps.	Strong competition from its closest neighbours, China and the Republic of Korea.

#### Corporate incentive

More is being done to promote unique venues in Japan to international buyers and a new subvention programme will encourage incentive planners to utilize such spaces. A new incentive award is also being planned by the Japan National Tourism Organization (JNTO) to recognize incentive planners who have used Japanese venues in a creative way, encourage local incentive specialists to raise their standards, and introduce the concept of incentive travel to Japanese companies.

China, the Republic of Korea, Taiwan Province of China, Singapore, Malaysia, Indonesia, Australia and the United States of America have been identified as Japan's key incentive markets. The Japanese government has plans to attract 40 million foreign visitors a year by 2020<sup>38</sup> but travel companies are concerned about the lack of infrastructure, especially accommodation capacity, to meet the added demand. They believe that the popular destinations of Tokyo, Kyoto and Osaka will not have enough accommodation by 2020. Already, demand for rooms remains high in Tokyo for business and leisure markets alike.

#### Association congress

Japan has been the traditional leader in hosting meetings and conventions. In recent years there has been increased competition from China and the Republic of Korea. Japan has the highest number of association executives<sup>39</sup> – at 194 – who are listed as a main contact person and holding a key position, and who are therefore important liaison persons for their associations which organize a wide range of meetings and events. For the next two years (2017–2018), Japan has secured at least 227 international conventions, no doubt with many others yet to be reported to ICCA Data.<sup>40</sup>

38 Naito, H. (2016), 'Japan doubles goal to 40 million foreign tourists in 2020', *The Asahi Shimbun*, 31-10-2016 (online), available at: [www.asahi.com](http://www.asahi.com) (10-12-2016).

39 I International Congress and Convention Association – ICCA (n.d.), *Association Database*, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (05-08-2016).

40 Ibid.



These key contacts are in a position to influence the selection of Japan as their association's future meeting's destination. Japan has the highest number of such key and influential association executives compared to other Asian destinations.

Table 5.4 Comparison between the three leaders in Asia's meetings industry, 2006–2015

Ranking	Number of association meetings held		Average size of meetings (pax)		Estimated total participants (pax)		Number of association key contacts	
1	China	3,700	Rep. of Korea	488	China	1,346,883	Japan	194
2	Japan	3,406	Japan	381	Japan	1,288,143	Rep. of Korea	89
3	Rep. of Korea	2,365	China	367	Rep. of Korea	1,153,154	China	52

Source: International Congress and Convention Association – ICCA database, *ICCA Destination Comparison Report*, electronic (19-07-2016).

#### Upcoming association meetings:

- 18th World Conference on Lung Cancer, October 2017, Yokohama (estimate 8,000 pax)
- 25th General Conference of the International Council of Museums, 2019, Kyoto (estimate 2,588 pax)
- 22 International Congress of Nutrition, September 2021, Tokyo (estimate 4,500 pax)

## Exhibitions

In 1956, the 2nd Osaka International Trade Fair became the first trade fair in Asia to be certified by UFI – the Global Association of the Exhibition Industry. As a global trendsetter for innovation and new technologies, Japan is of great interest for companies at the leading edge, and there has accordingly been strong growth in recent years in trade fairs on the theme of future technologies (nanotechnology, biotechnology, robotics, energy and the environment). According to the Japan Exhibition Association – JEXA, Japan's top exhibition organizers are building a track record for setting up bigger and better shows, both in terms of exhibitors and visitors. Although exhibitions used to be concentrated in Tokyo, Chiba and Yokohama, the expansion of exhibitions into the regions is noteworthy, with major fair sponsors recently. However, there is a shortage of exhibition facilities in Japan with most having reached their full capacity. In 2019 and 2020, Japan's exhibition industry will be affected if current plans for Tokyo Big Sight Exhibition Center, the main exhibition venue in Tokyo where the majority of Japan's major international exhibitions are held, is used as an Olympic venue and therefore will not be available for use for exhibitions for a period 20 months from April 2019 to November 2020. With this anticipated closure of Tokyo Big Sight and few viable alternative venues nearby, it seems possible that many of Japan's major exhibitions will be cancelled in 2019 and 2020.

With this scenario in mind, it is therefore assuring to know that the Japanese government has announced it will begin providing low-interest loans later this year to stimulate convention centre development across the archipelago. It was reported in CEI Asia that the Ministry of Land, Infrastructure, Transport and Tourism will lend up to half the cost of the convention centres to builders for up to 20 years<sup>41</sup>. The initiative is an expansion of the ministry's infrastructure stimulus

41 Gell, M. (2016), 'Japan invests in major event infrastructure', *CEI*, 15-08-2016 (online), available at: [www.cei.asia](http://www.cei.asia) (10-12-2016).



programme through the Organization for Promoting Urban Development, which currently offers similar loans for roads, parks and disaster prevention. International meetings planners have welcomed the news but would like to see complementary infrastructure and services developed alongside the new facilities.

#### 5.4.2 Kyoto: Trailblazing the green path

Green cities embrace a much more holistic view of growth and balance their ecology with economic growth. Recognizing that the benefits of growth must be optimized for the maximum number of the population and therefore getting consensus on a shared vision is very important, this success story is about a city's sustainable development.

Whenever *Kyoto* is mentioned, one of the first things that come to mind is the Kyoto Protocol, an international treaty to fight climate change. This Protocol was signed in 1997 at the International Convention Center Kyoto. It is therefore no surprise to learn that Kyoto recently joined the GDS Index (Global Destination Sustainability Index) as one of its pioneering members and has the honour of being the first and only Asian city. Kyoto's track record of sustainability and environmental responsibility goes back some 1,200 years.

Harmony with nature and sustainable growth has always been a key value to the city and prioritized over aggressive urban development. Strict building height restrictions protect the city's character and skyline. Kyoto has a global warming countermeasure programme with 12% of the city's total energy usage derived from renewable resources. The city offers electrical vehicle charging stations for drivers, and for those who use public transport, they appreciate why Kyoto is commonly known as the "30-minutes City" – virtually any part of the city can be reached in 30 minutes or less using public transportation. 41% of the city's hotels are within 1 km walking distance of the International Convention Center Kyoto.

The city's Do You Kyoto? sustainability programme involves all sectors of its community – from residents to businesses to visitors – and from all aspects of living or visiting Kyoto incorporating 'no-car' days, carbon offsetting programmes, support for solar panel installation and many other initiatives. Green-conscious business visitors to Kyoto will be happy to know that 15% of the city's total hotel room inventory has third party sustainability certification, and almost 60% of PCOs and DMCs located in Kyoto have a formal written sustainability policy.

In continuing with this tradition, the Kyoto Convention and Visitors Bureau (KCVB) offers several ways for convention visitors to contribute to fighting global warming. One of these initiatives is the special-priced Kyoto Convention Pass for qualified conferences which allows rides on all Kyoto City bus routes and subway lines during the congress period and three days prior to or after the congress for pre/post sightseeing. The bureau can also provide meetings organizers a list of hotels and conference centres that have eco-certifications and PCO/DMCs that have certifications and/or CSR or eco-policies and statements.

KCVB believes that its decision to join the GDS Index will pave the way for more sustainable meetings in Asia, noting that sustainability is a strong trend in the meetings industry. The bureau is planning more sustainable practices and is working with Kyoto's local government to create an easier way to offer the city's carbon offset programme as an option to meeting groups.

The city's recent bid wins include the World Conference on Carbon (2020), the 46th Annual Meeting of the International Society for the Study of the Lumber Spine (2019), the 31st Annual Meeting of the Society for the Advancement of Socio-Economics (2018) and the 5th World Parkinson Congress (2019) where it competed against Taipei and Kuala Lumpur to win the honour. Kyoto is the first Asian destination to host World Parkinson Congress, a triennial congress with some 3,200 participants from 50 countries.

The Global Destination Sustainability Index (GDS Index)<sup>42</sup> is the first-ever sustainability ranking for event destinations worldwide. It is a collaborative platform that aims to promote the sustainable growth of international meeting destinations based on a survey of benchmarked criteria provided by the cities. The Index is initiated by ICCA's Scandinavian Chapter and MCI, with support from IMEX and ICCA.

## 5.5 Macao, China

Macao, China, has strategically placed greater focus on its Unique Selling Proposition: the latest and newest hotels with integrated hospitality and meetings infrastructure offering the perfect facility package for mega groups. In 2015, Macao, China, welcomed the 9,000 pax Joy Main Annual Conference and The Global Tourism Economy Forum (GTEF) (3,000 pax), with many more slated in its events calendar. These all-in-one integrated venues are popular especially for big groups as they are easier to move around logistically, and there are more options for meetings, as well as extra varied entertainment, recreational and team building options, retail, accommodation and the ability to customise theme settings for the social events either indoors or outdoors. Spaces that can be configured and thematically transformed are popular as clients are always looking for unique venues that offer interesting alternatives to the conventional ballroom settings.

In addition, new infrastructure developments include entertainment and events space as more emphasis is placed on the promotion and development of its leisure and meetings industry. Currently, Macao, China, has more than 182,000 m<sup>2</sup> of meeting space and over 32,000 hotel rooms in the city with more international hotels development in the pipeline.<sup>43</sup> Several new world-class facilities have made the city even more attractive and enhanced its non-gaming offers. New and upcoming hotels include The Parisian Macao, Wynn Palace, MGM Cotai, and others which will bring the total to almost 50,000 rooms within the next few years. Almost 19,000 hotel rooms will be added between May 2015 and 2018, according to data from Bloomberg Intelligence.<sup>44</sup>

To further promote global tourism economy and the development of Macao, China, into a World Centre of Tourism and Leisure, the GTEF will continue for a total of five editions, starting in 2014. GTEF is hosted by the Secretariat for Social Affairs and Culture in collaboration with UNWTO. In November 2015, Macao, China, consolidated its government agencies offering support to meetings and event's organizers, and made the Macao Trade & Investment Promotion Institute (IPIM) the go-to agency for international meetings and events.

42 MCI Building Community (2016), 'Global Destination Sustainability Index releases first ever city ranking', press release, 17-11-2016, MCI Building Community (online), available at: [www.mci-group.com](http://www.mci-group.com) (15-12-2016).

43 Macao Trade and Investment Promotion Institute (IPIM), media conference during AIME, Melbourne, 11-02-2016.

44 Wong, S. and Palmeri, C. (2015), 'Macau bets \$27 billion it can lure more gamblers', *Bloomberg*, 18-05-2015 (online), available at: [www.bloomberg.com](http://www.bloomberg.com) (10-12-2016).

According to UFI's *Trade Fair Industry in Asia Report*, in 2014, Macao, China, was Asia's top performer with trade fair exhibition space growing by 38%.<sup>45</sup> Following the completion of major transportation infrastructure facilities such as the Hong Kong–Zhuhai–Macao Bridge, the new Guangdong–Macao cross-boundary checkpoint, as well as the light rapid transit system, Macao, China's investment environment will be further enhanced. Taking the Hong Kong–Zhuhai–Macao Bridge as an example, there will be a direct link to the Hong Kong International Airport. It will only take around 30 minutes to drive for incoming visitors thereby providing great facilitation to tourists and trade visitors, strengthening regional liaisons, promoting interaction between trade visitors and enhancing regional co-operation.

Being a regional trade and economic service platform, Macao, China, is capitalising the advantage of “leveraging on the Mainland, engaging ourselves globally”, and seizing the opportunities brought about by the implementation of the national “Belt and Road Initiative”, the 13th Five-year Plan, free trade zones, “Internet+”, as well as cross-boundary e-commerce. Macao, China, is striving to make full use of its role in the region and aiming for better development through constant improvements.<sup>46</sup>

Business events have been identified as a key way to diversify the economy and the government is providing a large range of support including:<sup>47</sup>

- a) The Convention and Exhibition Stimulation Programme;
- b) The International Meeting and Trade Fair Support Programme; and
- c) MICE Trade Show Rewards Programme.

### 5.5.1 Macao, China, SWOT snapshot and market segments

Strength	Weakness
Asia's newest hotel developments which offer integrated facility packages for meetings and incentive organizers, especially those for large groups. The compact and convenient convention precinct makes logistics easy.	Small domestic market and small association community, with great dependency on Mainland China's business.
Opportunity	Threat
The Chinese government will merge the cities in the Pearl River Delta – Guangzhou, Shenzhen, Dongguan, Zhaoqing, Foshan, Huizhou, Jiangmen, Zhongshan and Zhuhai – into a single megacity. A 30-mile-long bridge and tunnel is under construction to join the Pearl River Delta metropolis to Macao, China; and Hong Kong, China, opening up numerous meetings and business events opportunities.	The rapid rate of hotel development could result in a glut of hotel rooms and meetings space in a region with rising Chinese competitor cities including Shenzhen and Zhuhai.

45 The Global Association of the Exhibition Industry (2016a), *The Trade Fair Industry in Asia*, UFI [electronic], 12, pp. 21 and 81, available at: [www.ufi.org](http://www.ufi.org) (10-12-2016).

46 Macao Trade and Investment Promotion Institute (IPIM) website, 'Market Information' (online), available at: [www.ipim.gov.mo/en](http://www.ipim.gov.mo/en) (10-12-2016).

47 Macao Trade and Investment Promotion Institute (n.d.), *The Incentive Measures* (online), available at: [www.ipim.gov.mo](http://www.ipim.gov.mo) (10-12-2016).

## Corporate incentive

This year, Macao, China, hosted the 11th Worldwide Chinese Life Insurance Congress 2016 and International Dragon Awards and welcomed around 6,000 members of the worldwide Chinese insurance and financial industry for a well-known awards ceremony with delegates from 17 countries gather for meetings, networking events, award ceremonies and sightseeing tours. This is the second time Macao, China, is hosting this event, the first being in 2001. Other corporate events – Mary Kay China, Herbalife, Jeunesse Global and NU Skin among others – will bring participants ranging from 1,000 to 10,000 to Macao, China. Corporate meetings accounted for more than half of all business events in Macao, China, in 2014.

## Association congress

“I see Macao having great opportunities as an association event destination. It has great novelty appeal to associations that have already gone to other Asian cities,” said Corinne Jansen, Director of Sales-Association, Sheraton Macao Hotel in an interview with TTGmice.<sup>48</sup> Important and prestigious events hosted by Macao, China, include the International Infrastructure Investment and Construction Forum co-organized by Macao, China, and the China International Contractors Association and the China Expo Forum for International Cooperation, the first time the event would take place outside the Mainland.

In 2016, Macao, China, will also host ACM SIGGRAPH ASIA 2016 which will be co-located with the International Conference on Virtual Reality Continuum and Its Applications in Industry –VRCAI. SIGGRAPH ASIA is the continent's largest annual event in computer graphics and interactive techniques with some 6,000 participants expected to converge in Macao, China. The city's numerous integrated facilities that combine hotel rooms, meeting spaces, dining and retail offer large congresses such as this the convenience of housing their events and delegates all under one roof. To illustrate, the Cotai Central-Sands Resorts portfolio can cater up to 12,000 participants with over 150,000 m<sup>2</sup> of flexible meeting space. In 2017, Macao, China, will host the Asia Pacific Dental Congress, a unique achievement considering that the 2016 edition was held in Hong Kong, China. According to ICCA's Annual Report released in May 2016, Macao, China, was positioned 13th in Asia in 2015 by number of international association meetings held there.<sup>49</sup>

### Upcoming association meetings:

- 39th Asia Pacific Dental Congress, March 2017 (estimate 3,477 pax)
- IEEE/RSJ Conference on Intelligent Robots and Systems, November 2019 (estimate 1,266 pax)
- 9th International Symposium on PLS and Related Methods, June 2017 (estimate 112 pax)

48 Yue, K. (2012), 'Over coffee with Corinne Janssen', *TTGmice*, September 2012 (online), available at: [www.ttg mice.com](http://www.ttg mice.com) (10-12-2016).

49 International Congress and Convention Association – ICCA (2016b), *The International Association Meetings Market 2015* (online), available at: [www.iccaworld.org/news](http://www.iccaworld.org/news) (10-12-2016).

## Exhibition

In the area of its exhibitions and trade shows industry, Macao, China, has several advantages: a free port and a separate customs territory; the implementation of the Mainland and Macao Closer Economic Partnership Agreement (CEPA); as well as the free flow of capital and no foreign exchange control. Macao, China, has been rated by the World Trade Organization (WTO) as one of the most open trade and investment economies in the world for years and was ranked eighth among the “Asia-Pacific cities of the Future 2015–16 – FDI Strategy” in December 2015 by *fDi Magazine*.<sup>50</sup>

Macao, China, as a business and trade cooperation service platform between China and Portuguese-speaking Countries (PSC) has become increasingly important. It has long played a unique role as a trade and economic co-operation service platform between China and PSCs. Due to historical ties, Macao, China, has been closely connected in trade and economy with PSCs of a population of 260 million. Macao, China, can serve as a stepping stone for PSCs' products and services to enter the Mainland market, or explore the Mainland market in cooperation with Pan-PRD enterprises through franchising. Various Macao, China, financial institutions and enterprises have established networks in PSCs. Enterprises from PSCs have also set up factories to market their products to the Mainland by enjoying the preferential treatment under Macao, China, and Mainland China Closer Economic Partnership Arrangement (CEPA). In addition, economic integration between Macao, China, and the Mainland, China, will be further deepened and closer cooperation between Guangdong province, Hong Kong, China; and Macao, China, will be promoted with implementation of the Pan-Pearl River Delta Regional Co-operation Framework Agreement.

All these represent huge opportunities for a vibrant and dynamic trade show industry in Macao, China.

There are currently three UFI-approved events – the Macao International Trade and Investment Fair (MIF), Macao International Environmental Cooperation Forum and Exhibition (MIECF) and Global Gaming Expo Asia.

### 5.5.2 New direction for Macao, China, mega events city

While Macao, China's gaming revenues – largest in the region and four times more than Las Vegas – has declined, visitor numbers remain steady proving that there is more than its casinos. In addition to catering to big meetings groups, its new side is its Las Vegas-style recreation hub for families and couples, with restaurants, entertainment and shopping as the focus. This is part of the reinvention which emphasizes on the development and fine tuning of tourist attractions and experiences. In the past, most travellers would visit from Hong Kong, China, for just a day trip but the government now plans to use more attractions and more hotel rooms to draw more overnight tourists, who will spend four times more than visitors who stay for only a day, according to data from Bloomberg Intelligence. The number of overnight Chinese visitors in Macao, China,

50 Mullan, C. (2015), 'fDi's Asia Pacific Cities of the Future 2015/16: the winners', *fDiIntelligence*, 07-12-2015 (online), available at: [www.fdiintelligence.com](http://www.fdiintelligence.com) (10-12-2016).

actually increased by about 100,000 in the first quarter of 2016 while day-visitor arrivals fell by about 200,000.<sup>51</sup>

With this in mind, Macao, China, is looking to broaden the territory's appeal beyond both its gaming roots and its mainland China source-market focus. For example, MGM Cotai is being developed to drive greater product diversification and bring more advanced and innovative forms of entertainment to Macao, China, as it grows as a global tourist destination. Today, Macao, China, has emerged as a culinary and entertainment destination, while its roots as a Portuguese territory have made it a cultural draw.

Four hotels totalling 6,400 rooms will open by end 2016/first quarter 2017:

1. Parisian Macao with 3,000 rooms will include 5,200 m<sup>2</sup> of flexible meeting and exhibition space, and a half-scale replica of the Eiffel Tower. Opened in September 2016;
2. Wynn Palace Cotai with 1,700 rooms in a floral-themed resort that will include "SkyCabs" ferrying guests over a 32,375 m<sup>2</sup> lake;
3. The 13, with 200 super luxurious rooms is reported to be the world's highest per-room cost anywhere. Rolls-Royce Phantoms will be used for guest shuttle services; and
4. MGM Cotai with 1,500 hotel rooms and its "jewellery box" design will offer Asia's first dynamic theatre with over 14 seating configurations and a 180° immersive stage backdrop.

## 5.6 Malaysia

Due to its strategic location at the centre of South-East Asia, and between India and China, Malaysia's "Truly Asia" tourism campaign has seen this country a hit with global travellers. The same can be said for its meetings industry as it continues to gather steam and demonstrates its capability through a roll call of distinguished conferences and conventions including WTM Connect Asia 2016, World Cancer Congress 2018, World Urban Forum (WUF 9), ISI World Statistics Congress – ISI 2019 and the World Federation of Haemophilia World Congress 2020. Its conventions brand "Malaysia – Asia's Business Events Hub" leverages on the country's position as the trading and meeting point between Asia, the Middle East and the West. Its other goal is to position Malaysia as the core of Asian cultures and an entry point for international organizations through business events.

In 2010, with the launch of the nation's Economic Transformation Programme (ETP), the Malaysia Convention & Exhibition Bureau (MyCEB), itself only just established, was given a critical role to establish Malaysia as a leading meetings destination under Entry Point Project (EPP) 10 which sits under the overarching Tourism NKEA (National Key Economic Area) umbrella.

By 2020, meetings and business events are expected to contribute MYR 3.9 billion in the incremental Gross National Income (GNI), provide about 16,700 jobs, and with business events arrivals reaching 2.9 million visitors.<sup>52</sup> Based on projections, business event visitors are expected to grow from 5% to 8% of Malaysia's total visitor arrivals.

51 TTG Asia (2016b), 'China outbound show slowest growth since 1997', *TTG Asia*, 31-05-2016 (online), available at: <http://ttgasia.com> (12-12-2016).

52 Malaysia Convention and Exhibition Bureau (2012), 'Kesatrias appointed to boost Malaysia's business events industry', press release, 19-01-2012, Tourism Malaysia (online), available at: [www.tourism.gov.my](http://www.tourism.gov.my) (10-12-2016).

Some 36 new hotels are coming online throughout the country by December 2016 catering to business travellers. Venues that have already opened its doors to travellers include St Regis Langkawi, which complements the world-class Langkawi International Convention Centre (LICC) which opened in March 2015 and has already hosted international meetings such as the 26th ASEAN Summit and Langkawi International Maritime & Aerospace Exhibition (LIMA) ASEAN Summit. Delegates using the Putrajaya International Convention Centre now have an additional hotel i.e. the Le Méridien Putrajaya. In the capital city, the St. Regis Kuala Lumpur opened in May 2016 and offers 208 rooms.

In 2015, Malaysia won a total of 153 international conferences, incentive groups and trade exhibition events with a total estimated economic impact value of MYR 898 million<sup>53</sup> (approximately USD 224 million). In the period 2010 to 2015, MYCEB provided support to 1,350 events with the aim of increasing delegate awareness and attendance, their length of stay and spending in Malaysia. These events which are already booked for Malaysia, will bring about MYR 6.8 billion (approximately USD 1.7 billion) to the country. In addition to the national and state convention bureaus (MyCEB and Sarawak Convention Bureau respectively), Penang has established its Penang Incentive and Convention Bureau while Sabah is in line to set up its own state bureau as well. Four convention centres are in various development phases – two in Penang, one in Kuala Lumpur and one in Kota Kinabalu, Sabah and when fully opened, will change the meetings landscape in Malaysia. By 2017, venue capacity is expected to increase by more than 40% from its current capacity. Construction of new venues in Malaysia's major cities include Penang (sPICE and PWCC), Sabah (ITCC Penampang and SICC), and Kuala Lumpur (MITEC).

### 5.6.1 Malaysia SWOT snapshot and market segments

Strength	Weakness
Establishment of new city/state bureaux to lead the development of meetings in the respective destinations and supported by new convention centres in Penang, Kota Kinabalu and Kuala Lumpur.	Shortage of specialist companies to keep pace with demand and innovative products to entice repeat visitors.
Opportunity	Threat
Business events have been recognized as a key contributor to the nation's Economic Transformation Programme in line with the development of high yield visitors.	Challenge to develop products that keep pace with market trends, competitive behaviour and client demands.

#### Corporate incentive

Malaysia has been recognized as one of the top-10 best international destinations for meetings. The award, bestowed at the Ninth China MICE Industry Golden Chair Awards in Beijing, is testament to the nation's capabilities in hosting meetings on a global scale. China is one of Malaysia's top markets for corporate meetings and incentives, contributing 25% of this sector's arrivals. In 2015,

<sup>53</sup> Malaysia Convention and Exhibition Bureau (2016b), 'Success by Design', *Annual Report 2015*, p. 5.



Malaysia welcomed the Perfect China Incentive & Travel Seminar with 6,000 participants and the Infinitus Jiyang Overseas Training trip with 4,800 participants.

Malaysia's two key initiatives, "Malaysia Like Never Before" campaign and "Malaysia Twin Deal X" programme, have received good responses since it was launched in early 2015. For the "Malaysia Like Never Before" campaign five new incentive experiences have been introduced, supported by a dedicated microsite available in English, Mandarin, Korean and German, focused mainly on digital marketing. The "Malaysia Twin Deal X" programme offers two opportunities for support and rewards for corporate clients and meeting and incentive planners.

### Association congress

Malaysia develops and strengthens local associations through its Association Development Programme which offers a range of training initiatives and financial and non-financial support to create international engagement opportunities and promote the professional development of Malaysia's national associations. One such effort is its MyneXt event for association executives which offers the opportunity for Malaysian associations to learn, exchange ideas and network amongst each other. During MyneXt, participants were able to take away invaluable insights such as innovative solutions and latest best practices in the association management industry which includes issues in management and transformation, membership development and income diversification. The event also invited discussions and brainstorming on other important issues for associations for example, a sustainable ecosystem between associations, conference organizers, international counterparts and how to put together content that will drive delegates' interests. In the pipeline is MySAE – the Malaysian Society of Association Executives – which will further contribute to the growth and development of local associations, strengthening them and making them potential local hosts of future international conventions.

#### Upcoming association meetings:

- EARCOS Teachers Conference 2017, March 2017, Kota Kinabalu (estimate 1,260 pax)
- 29th Congress of the International Association for Suicide Prevention and Crisis Intervention 2017, July 2017, Kuching (estimate 1,300 pax)
- 34th International Congress of the World Federation of Hemophilia 2020, Kuala Lumpur (estimate 4,300 pax)

### Exhibition

In 2014, the members of the Malaysian Association of Convention & Exhibition Organisers & Suppliers (MACEOS) organized 70 trade shows and 168 consumer shows totaling 640,000 m<sup>2</sup>.<sup>54</sup> Additionally, MACEOS members organized 59 conventions, conferences and concerts with 95% of all meetings held in the Klang Valley. The twelve member venues who were surveyed reported a total of 936 exhibition days and 724,000 total net m<sup>2</sup>.

54 Malaysian Association of Convention and Exhibition Organisers and Suppliers (2015), 'What's new with MACEOS', newsletter, 03-06-2015, MACEOS (online), available at: [www.maceos.com.my](http://www.maceos.com.my) (10-12-2016).



The exhibitions industry believes that Malaysia has not yet reached its potential in this segment due to the shortage of space. New purpose-built facilities are coming onboard with the long awaited venue in Kuala Lumpur, MITEC, opening in 2017 and followed by the others in quick succession. Currently, three venues – Kuala Lumpur Convention Centre (KLCC), Setia City Convention Centre and Putra World Trade Centre – are undergoing redevelopment and/or expansion, further adding to the country's capacity to host exhibitions and trade shows.

The 2016 edition of the Malaysian International Furniture Fair (MIFF) – South-East Asia's biggest global furniture market – served as the first pilot event between Alibaba's business-to-business (B2B) unit and UBM in their strategic partnership to build the next generation of online-to-offline (O2O) sourcing experiences. Through this partnership, Alibaba and UBM Asia – both prominent players in their respective fields of B2B trade – will change how online and offline trade takes place. The partnership will offer small and medium-sized enterprises a multichannel B2B trading experience and the opportunity to tap into the combined expertise of the two industry pioneers for more worldwide trading opportunities.

It is anticipated that the synergy created by the alliance will ensure that exhibitors can gain trust from buyers, receive wider exposure and more sales opportunities online before the fair and, as well as onsite. At the same time, buyers can be reassured that they are protected from any late shipment, quality or payment issues when dealing with suppliers thanks to the Alibaba Trade Assurance programme. Within this programme, buyers through the Alibaba.com platform can gain protection coverage starting at USD 40,000 from selected MIFF exhibitors should these exhibitors/suppliers fail to meet product quality or shipment time. MIFF exhibitors in return, gain additional benefits of reliability and expand buyer reach by becoming Alibaba.com Trade Assured members.

Furniture and interior design, machinery, building and hardware, business SMEs, packaging and printing, and inventions and innovations are some of the key emerging sectors in Malaysia's trade exhibitions.

### 5.6.2 Sarawak, Malaysia

The state government of Sarawak has shown leadership and commitment to developing the state's meetings industry through the establishment of the Sarawak Convention Bureau (SCB) in 2006 – Malaysia's first convention bureau – and followed by the Borneo Convention Centre Kuching three years later. This is especially visionary and courageous when Kuching, the capital city of Sarawak, already has a laundry list of challenges as a meetings destination:

- Lack of international air access and connectivity;
- Low international profile as meetings destination;
- Lack of suitable large meeting venues;
- Shortage of hotel rooms for business travellers and delegates; and
- Lack of industry suppliers with experience and skills in catering to the meetings market.

In the past, people used to wonder who would want to host a conference in a location such as Sarawak. In fact, "where on earth is Sarawak?" was a normal quip, and one which the SCB used in their award-winning promotional video "Recharge in a New World". Taking a different approach instead of the usual destination showcase, the story-lined TV commercial infused

with tongue-in-cheek humour won hearts and minds when it did not shy away from the fact that many international meeting planners do not know where Sarawak is. The success for Sarawak in the meetings industry has inspired other Malaysian states to emulate its model with their own convention bureaus. SCB has secured 424 events since its launch in 2006, which includes the arrival of close to 167,000 international delegates and MYR 342 million (USD 85 million) in direct delegate expenditure.<sup>55</sup> Key bid wins for the bureau include the 21st Joint Singapore – Malaysia Nursing Conference 2016 (800 delegates), 21st Malaysian Conference of Psychological Medicine 2017 (1,300 delegates), the Congress of the Asian-Australasian Association of Animal Production Societies 2018 (1,200 delegates) and the International Marine Conservation Congress 2018 (800 delegates).

SCB has been honoured with nine international awards plus a national award for branding and marketing, and positioned Sarawak as an up-and-coming second-tier meetings destination in the global arena.

Among the feathers in its cap, the state can boast of its “Anak Sarawak” Award, the first in Malaysia that recognizes the contribution of convention hosts and its industry partners to the growth of meetings in Sarawak. In addition, its International Convention Scholarship Award allows successful applicants a grant to fund their travel, accommodation, association membership and convention registration fees. In 2015, the four successful applicants, each selected the international convention of their choice and proudly represented Sarawak at the World Psychiatric Association International Congress Cape Town; the Incentive, Conference & Event Society Asia-Pacific (ICESAP) Annual Conference in Singapore; the 61st Annual International Council for Small Businesses (ICSB) World Conference in New York; and the Congress of Neurological Surgeons 2015 Annual Meeting in New Orleans. Previous winners have returned with a wealth of new knowledge for their own professions and built their networks and credentials. These recipients will also be involved in bidding for future conferences to Sarawak.

In November 2016, Kuching the capital city of Sarawak, won international kudos when it hosted some 830 members of the International Congress and Convention Association (ICCA) at this global association’s annual congress and general assembly.

## 5.7 Philippines

Philippines is considered by some as the grand dame in the convention industry in Asia with a long tradition for hosting international events. In 1976, Manila hosted the International Monetary Fund/World Bank annual meeting at its brand new Philippine International Convention Center – PICC – Asia’s first international convention centre. As one of the most deregulated, trade-oriented economies in Asia, its status as a business-friendly destination is enhanced by a high-quality and creative labour force. English is widely spoken as the language of business and government and the country is a major offshore resourcing port for many multinational companies and information technology services.

55 ETB Travel News (2016), ‘A decade of success – the Sarawak Convention Bureau’s 10th Anniversary’, *ETB Travel News*, 08-11-2016 (online), available at: [www.etbtravelnews.global](http://www.etbtravelnews.global) (12-12-2016).

Today, Philippines is seeing economic growth and foreign investments in major industries and business enterprises related to infrastructure, energy, hospitality, as well as special economic zones leading to several five-star hotels opening in Metro Manila. In November 2015, Philippines hosted over 7,000 delegates from all over the world who converged in Manila for the Asia Pacific Economic Cooperation – APEC Summit. The country will host 65th Miss Universe pageant with the coronation night taking place at the Mall of Asia Arena in Pasay on 30 January 2017. This will be the third time the pageant is held in the Philippines, the first being 1974 and then in 1994.

In January 2016, the Tourism Promotion Board Philippines (TPB) achieved its ISO 9001:2008 certification which confirms that the TPB operates a quality management system (QMS) with a scope of service covering the 'design, development and provision of Philippine tourism marketing and promotion services,' verifying TPB's commitment to providing quality and efficient services to its clients and partners.

According to a statement by Philippines' Department of Tourism, the tourism sector received a substantial budget increase in 2016, up 44% from the 2015 budget of PHP 2.5 billion (USD 53 million) to a PHP 3.61 billion (USD 76.5 million) sum for 2016.<sup>56</sup> Presumably, this will also translate to a shot in the arm for Philippines meetings industry.

### 5.7.1 Philippines SWOT snapshot and market segments

Strength	Weakness
Long history and tradition for hosting international meetings, with international standard venues, and English being widely spoken.	Limited connectivity to other destinations and relative lack of infrastructure and logistical support.
Opportunity	Threat
Greater foreign investment volumes and improving business infrastructure in Manila are contributing to positive sentiment within its meetings sector.	Security concerns due to past incidences.

#### Corporate incentive

The country has an array of natural and cultural attractions including six listed world heritage sites. First-class facilities and amenities are relatively more affordable here, thanks to a favourable currency exchange rate. In the area of incentive travel, Philippines offers many special and exciting itineraries. Boracay, the jewel of Philippine tourism, is a favourite destination for incentive groups. The country is also Asia's Dive capital and has the highest density of coral species and some of the most biodiverse and marine rich waters in the world offering a variety of aquatic resources.

Meetings participants and delegates to the Philippines can often expect to encounter traces of the Chinese, Islamic and Indian traders who were regular visitors as far back as the 12th Century.

<sup>56</sup> Parrocha, A.N. (2015), 'Tourism 2016 budget up by 44% to Php3.61B', *Balita*, 23-12-2015 (online), available at: [www.balita.ph](http://www.balita.ph) (12-12-2016).

Incentive travel planners will find a wide array of hotels and resorts that can accommodate big and small business groups and offer many unique options for themed functions. Incentive travel has increased as a result of availability of entertainment, friendly ambience, economical hotels, multiple group and team-building activities and safety, said an Indian incentive planner who recently sent a 110-strong incentive group to Manila.

### Association congress

Philippines boasts of expertise in aquaculture, agriculture, film animation, health and well-being, rice research and fashion, as well as emerging knowledge-based industries such as software development, engineering design and communications.

The website of Tourism Promotions Board Philippines (TPB PHL) has a directory of associations based in the Philippines, indicating that TPB PHL collaborates with national associations and societies to attract more international meetings to Philippines.<sup>57</sup>

In March 2015, with the Philippine Council for the Advancement of Association Executives (PCAEE) taking the lead, four Asian associations announced the formation of the Asia-Pacific Federation of Association Organizations (APFAO). Gathering association communities in Australia, the Philippines and the Republic of Korea, APFAO hopes to improve education, knowledge sharing, and standard setting across the region plus leveraging on a larger group of association executives to improve resources and opportunities. This is an opportunity for Asian associations to play a bigger and more active role which will in turn spur association meetings and congresses.

#### Upcoming association meetings:

- 18th International Conference on Artificial Intelligence in Education, June 2017, Cebu (estimate 350 pax)
- 20th Congress of the International Leprosy Association, 2019 (estimate 840 pax)
- 23th Asian Pacific Congress of Cardiology, Manila, 2019 (estimate 1,864 pax)

### Exhibition

Although the potential for the exhibitions industry's growth is large, it has remained largely untapped due to various challenges including lack of infrastructure and logistical support. However, an easing of restrictions and regulatory requirements is expected to boost foreign direct investment (FDI) in the Philippines, as the administration of President Rodrigo Duterte aims to position Philippines as one of the top-3 destinations for FDI inflows in South-East Asia by the end of Duterte's term in 2022.<sup>58</sup>

In November 2016, the Philippine Trade Training Center hosted the City Infrastructure Philippines 2016 Exhibition & Conference, a comprehensive exhibition and conference on infrastructure

57 Tourism Promotions Board Philippines (2015), *Directory of associations based in the Philippines*, Tourism Promotions Board Philippines (online), available at: [www.tpb.gov.ph](http://www.tpb.gov.ph) (10-12-2016).

58 Oxford Business Group (2016), 'Philippines in bid to boost FDI', Oxford Business Group, 26-07-2016 (online), available at: [www.oxfordbusinessgroup.com](http://www.oxfordbusinessgroup.com) (10-12-2016).

development encompassing green and smart cities, highway, rail, underground, drainage and logistics infrastructure in Philippines.<sup>59</sup> A series of infrastructure projects (e.g., high standard highways, light rail transit systems (LRTs), mass rapid transit systems (MRTs), subways, automatic fare collection systems (AFCS), six major airport rehabilitation and upgrading, new seaports, dams/dikes, flood control, underground drainage for the nation) are currently being rolled out. One keenly anticipated project is to clear up Metro Manila and the surrounding areas of its congestions. A USD 58 billion blueprint “Roadmap for Transport Infrastructure Development for Metro Manila” and its surrounding areas have been developed. This project will spin-off to many other infrastructure projects, including industrial zones, seaports, intermodal and logistics centres, more highways, roads, bridges and underground land- and sea-subways from the new airport to the city.

The supporting infrastructure will no doubt help Philippines’ trade, investment, conventions and exhibition industry to grow further.

### 5.7.2 Grand Dame Manila

Manila emerged as the forerunner of the MICE industry in South-East Asia in 1976 when the development of Philippine convention industry became official government policy in 1976 and Philippine Convention Bureau was established. Despite a promising start, over the years, Manila’s lead has somewhat eroded as it faced stiff competition from more aggressive Asian neighbours. Today, Philippines is working to reclaim its market share in the global meetings industry. Over the past decade Philippines has enjoyed a steady increase in tourism. With an environment that is progressively becoming more conducive to business, Philippines, and Manila in particular, are set to become again a popular meetings destination in Asia. This has caught the attention of global hotel brands wanting to be a part of the trend, resulting in an increase in properties willing to cater to the ever-growing demands of corporate guests. Of the 16 international association meetings scheduled for Philippines in 2017, about 60% are booked in Manila. Key convention venues in Manila include the Philippine International Convention Center (PICC), SMX Convention and World Trade Center Manila. The SM Group has four centres in Philippines – Pasay City, Davao, Taguig City and in the Visayas.

Manila was one of the four pilot areas identified for Philippine Halal Tourism Programme when the Department of Tourism (DOT) Philippines was seeking to position the country as the world’s newest Muslim-friendly destination. The DOT is partnering with the Halal International Chamber of Commerce and Industries of Philippines (HICCIIP) and CrescentRating, an authority on Muslim travel for the project to help build capabilities and resources, as well as launch a destination marketing campaign. It will also use CrescentRating services to accredit hotels and restaurants in major cities.<sup>60</sup>

59 City Infrastructure Philippines (n.d.), *City Infrastructure Philippines 2016* (online), available at: [www.cityinfraphil.com](http://www.cityinfraphil.com) (10-12-2016).

60 For more information on Islamic tourism in the Philippines please consult: World Tourism Organization (2017), *Contribution of Islamic Culture and its Impact on the Asian Tourism Market*, UNWTO, Madrid.

## 5.8 Singapore

The Singapore Tourism Board (STB) has launched its “MICE 2020 Roadmap” which was developed in consultation with more than 200 industry executives and focuses on playing to Singapore’s strengths, while generating greater value for visitors and organizers.

According to STB, 20% of total visitor arrivals to Singapore is related to meetings, and they contribute to around 33% of overall tourism receipts.<sup>61</sup> To encourage more travellers to combine their business trips with leisure, the Singapore Exhibition & Convention Bureau (SECB) is expanding its partnerships with the travel trade, industry associations and various media owners to share destination lifestyle content targeted at business visitors. Among these, a marketing campaign with CNN and The Economist to distinguish Singapore as a premier meetings hub anchored on thought leadership and business opportunities.

Singapore’s position as an international technology thought leader was given a boost recently when the city secured a string of high-profile sector-related meetings and events. Hosting the Information Systems Audit and Control Association – ISACA Cybersecurity Nexus (CSX) Asia and the Pacific and the Internet Engineering Task Force (IETF) events will offer content and inspire further dialogue that will further build Singapore’s thought leadership, a critical component of its knowledge-driven industries. Both events are expected to bring in approximately 2,500 IT engineers and developers from all over the world to Singapore to explore initiative on new Internet framework development and cyber security structure enhancements for Internet users worldwide. No doubt Singapore’s big push to become a smart, connected city has made it a relatively easy decision for ISACA.

### 5.8.1 Singapore SWOT snapshot and market segments

Strength	Weakness
Strong government involvement in terms of inter-ministerial support and grants/funds for meetings. This makes Singapore the role model which illustrates an all-in-government approach to the meetings industry.	Considered an expensive meetings destination when compared to other Asian destinations. Singapore is ranked fourth globally in Mercer’s 2015 Cost of Living Survey.
Opportunity	Threat
Constant reinvention and innovation with new and innovative products with focus on Experiential Events.	Singapore has a small domestic market and small association community.

#### Corporate incentive

Singapore’s success can be attributed to several factors: a vibrant ecosystem that nurtures business events, the dynamic growth in Asia, and the nation’s constant ability to reinvent itself. The transformation of Singapore’s tourism landscape, supported with strong fundamentals and

61 Yeo, L. (2016), ‘Sharpening our strategies towards Quality Tourism’, *Singapore Tourism Board*, 26-04-2016 (online), available at: [www.stb.gov.sg](http://www.stb.gov.sg) (10-12-2016).

world class professionalism, has established its reputation as one of the region's most sought-after leisure and business destinations. To maintain this edge, the Singapore Exhibition & Convention Bureau (SECB) under the Singapore Tourism Board (STB), looks to create value continuously. The presence of more than 7,000 multinational companies, of which about 4,000 have located their regional headquarters in Singapore, makes it a hub for corporate incentive events. The city-state remains a key hub for business activities such as research and development (R&D) and training, amid the shift in focus towards higher value-add activities.

Singapore is always looking to stand out from the crowd by differentiating itself through new, unique and value added experiences. Two government funds – the Kickstart Fund and the Tourism Technology Fund – are focused on enhancing the Singapore Experience for leisure and business visitors that makes them want to come back for more.

### Association congress

Singapore is home to 140 non-profit associations,<sup>62</sup> and a member of the Global Association Hubs Partnership (GAHP) with Washington D.C., Dubai and Brussels. GAHP hopes to foster long term relationships and better support associations based in their cities to grow and expand internationally which will reinforce GAHP cities' status as global association hubs. This gives Singapore the opportunity to use its status as a gateway to support association activities and be recognized as the platform for international associations to grow and build their capacity in the Asia and the Pacific region.

On the national front, Singapore's Trade Association Hub will be set up by early 2017. As trade associations and chambers serve as a useful multiplier to reach out to many companies, the government is keen to support their development and operations. Through this co-location, trade associations and chambers can benefit from economies of scale and cost savings by sharing resources and facilities. The Hub will facilitate sector-level capability development and promote cross-sector collaboration, such as skills upgrading, business co-creation and sharing of best practices, thus catalyzing industry transformation. The Singapore Chinese Chamber of Commerce and Industry (SCCCI) believes that trade associations can lead local companies in the next phase of the nation's economic restructuring process.

Apart from the 5-year SGD 700 million (approximately USD 521 million) Tourism Development Fund, STB also implemented the Business Events in Singapore Fund to support the local industry players in their quest to provide high-quality business events. There were two new initiatives: to support business development that are entirely driven by the industry; and to support local association members to attend relevant global association events prior to bidding for an event. STB will continue to give more support through the Business Events in Singapore (BEiS) fund. In 2015, STB supported 27% more business events than the previous year. The various support programmes include:

- **Singapore MICE Advantage Programme (SMAP)** with Changi Airport Group and Singapore Airlines: this programme is intended to complement the BeiSincentive scheme (see below) currently offered by the convention bureau. Meetings delegates travelling to Singapore to attend SMAP-supported events can enjoy exclusive airline and airport benefits;

<sup>62</sup> Future Ready Singapore (n.d.), *International Non-Profit Organisations* (online), available at: [www.edb.gov.sg](http://www.edb.gov.sg) (12-12-2016).



- **Business Events in Singapore** (BEIS) incentive scheme; this scheme seeks to encourage business events industry to anchor and grow quality events, as well as catalyze the innovation of new content;
- **In Singapore Incentives and Rewards** (INSPIRE) programme: this rewards programme leverages on Singapore's unique and world-class attractions to curate unique value-added experiences;
- **Kickstart Fund**: this fund supports the creation of innovative lifestyle concepts and events with strong tourism potential with the aim of adding to the existing quality tourism software and enhancing the Singapore Experience; and
- **Tourism Technology Fund**: for tourism businesses leveraging technology to enhance visitor experience.

#### Upcoming association meetings:

- Asia Pacific Hospice Conference 2017, July 2017 (estimate 1,200 pax)
- 26th World Congress on Intelligent Transport Systems, October 2019 (estimate 5,000 pax)
- Lions Club International Convention, June 2020 (estimate 20,000 pax)

## Exhibition

Strong trade and investment has made Singapore the second most competitive country in the world and Asia's most competitive.<sup>63</sup> Singapore is ranked second, after New Zealand, in the ease of doing business according to the World Bank and the Economist Intelligence Unit ranks Singapore as having the best business environment in Asia and the Pacific.<sup>64</sup>

The tiny city state with big ambitions and a visionary outlook, certainly has all the ingredients as Asia's Most Popular Convention City in 2015,<sup>65</sup> holding on to this position consistently. One of the first in Asia to use a 'cluster approach' envied and since emulated by others, Singapore co-created and developed a strong network of meetings within its key priority industries and leveraged these for further growth in trade, investment and thought leadership.

One sterling case study is the homegrown Singapore International Water Week (SIWW). The 7th edition of SIWW 2016 ended with SGD 15.2 billion (approximately USD 11.3 billion) in total value of business deals – projects awarded, tenders, investments and MOUs, R&D collaborations and project partnerships. Held in conjunction with the World Cities Summit (WCS) and CleanEnviro Summit Singapore (CESS), the three co-located conferences attracted more than 21,000 participants from 115 countries and regions over 4 days in July 2016.

As an integrated component across SIWW, WCS and CESS, the inaugural City Solutions Singapore brought together more than 1,000 leading companies and innovative start-ups that showcased new

63 Schwab, K. et al. (2016), *The Global Competitiveness Report 2015–2016*, World Economic Forum, Geneva, preface xv.

64 Ming, C.P. (2016), 'Singapore ranks 2nd in ease of doing business', *The Business Times*, 27-10-2016 (online), available at: [www.businesstimes.com.sg](http://www.businesstimes.com.sg) (12-12-2016).

Ministry of Foreign Affairs Singapore (2014), 'Channel News Asia: Singapore retains top spot in EIU Business Environment Rankings' (online), available at: [www.mfa.gov.sg](http://www.mfa.gov.sg) (12-12-2016).

65 International Congress and Convention Association – ICCA (2016b), *The International Association Meetings Market 2015* (online), available at: [www.iccaworld.org/news](http://www.iccaworld.org/news) (10-12-2016).



and cutting-edge solutions for urban development, water, and waste and cleaning management. More than 100 co-located events were organized on the sidelines of SIWW, including the inaugural high-level ASEAN Plus Three Water Ministers Forum (APTWMF) where Ministers shared the latest plans and developments of water resources management among APT countries. It facilitated the strengthening of cooperative efforts to improve overall water management among the ASEAN-China, ASEAN-Japan, and ASEAN-Korea Centres.

Leading the development of ISO international standard for water efficiency management systems, Singapore also hosted the second ISO TC 224 Working Group 12 meeting. This working group is in charge of drafting the new ISO standard on water efficiency management systems, which is based on the Singapore Standard on water efficiency management systems (SS 577).

### 5.8.2 Future ready

Emerging industries which enjoy the Singapore Economic Development Board's careful nurturing include the following:<sup>66</sup>

- **Automotive:** Singapore's excellent physical and trade connectivity, availability of supply chain professionals and well-established financial infrastructure make the country an attractive location for procurement and supply chain management activities in the automotive sector. Its strong industrial base in electronics, info-communications and mechanical engineering has supported the growth of related automotive R&D in Singapore;
- **Lifestyle products and services:** art, collectibles, performing arts and sports companies are examples of lifestyle businesses that are growing in Singapore. Coupled with having the best business environment in the world, Singapore is a natural launch pad and international hub for lifestyle businesses looking for global success;
- **Natural resources:** Singapore is located in the centre of a region which is home to some of the top producers of several commodities. Hence companies in the commodities or natural resources business are finding it attractive to choose Singapore as the epicentre of their operations;
- **Robotics:** Singapore recognizes robotics as a growth industry, and aims to build an ecosystem that is globally competitive. Singapore also intends to leverage advanced robotics (and more broadly autonomous systems) as an enabler to meet some of its own service delivery needs (e.g., in healthcare). Through strategic deployment, advanced robotics can potentially help free up resources, enabling its workforce to take on higher value, more productive jobs;
- **Safety and security:** with rapid urbanisation in Asia, the safety and security market in Asia is experiencing the fastest growth and is expected to grow at 8% compound annual growth rate to 2015.<sup>67</sup> Singapore is emerging as a thought leader for safety and security in the Asia and the Pacific region and its credentials in this sector cemented when INTERPOL chose Singapore for a Global Complex for innovation which will serve to enhance its global operations;

66 Singapore Economic Development Board (n.d.), 'Industries', *Future Ready Singapore* (online), available at: [www.edb.gov.sg](http://www.edb.gov.sg) (11-12-2016).

Singapore Tourism Board (2015), 'Singapore Experience Awards 2015: 27 outstanding individuals and organisations honoured, Annex A – The Singapore Experience Awards 2015 Finalists and Recipients', media release, 21-10-2015, Singapore Tourism Board (online), available at: [www.stb.gov.sg](http://www.stb.gov.sg) (09-12-2016).

67 Frost and Sullivan market growth opportunities in Asia Pacific Homeland Security 2011.

- **Singapore: Real-Time** – The vision of Singapore: Real-Time is the creation of an interactive city by making available real-time and commercial data. The availability of real-time data unlocks new opportunities for businesses to create innovative business solutions which can improve efficiencies or create new value. Singapore: Real-Time can also enable new smart city solutions which will allow Singapore to improve urban efficiencies and liveability; and
- **Space:** in 2011, Singapore became the first South-East Asian country to successfully deploy its indigenous satellite, which was designed and developed locally by the Nanyang Technological University (NTU). This capability has since been commercialised to design, develop and produce advanced remote sensing satellites.

## 5.9 Sri Lanka

Sri Lanka has more than a three-decade history as a host of international events which included the 5th Non Alignment Conference in 1976 which brought 83 world leaders to its shore. UNWTO held its global conference “Tourism: A Catalyst for Development, Peace and Reconciliation” in Passikudah in July 2016. This is the first time an international level conference was held in the Eastern Province, which was engulfed in the throes of civil war for nearly 30 years. According to Sri Lanka’s Minister of Tourism Development and Christian Religious Affairs and Lands, John Amaratunga, the conference will open a new chapter in the renaissance of the tourism, conventions, and industries in the east coast of Sri Lanka. After years of turbulence brought on by strife that retarded the nation’s progress, and one of the worst natural disasters in history – the Boxing Day 2004 Tsunami – Sri Lanka today is looking to continue its journey. Despite the widespread wreckage and devastation, Sri Lanka has picked up the pieces with great optimism and resilience and rebuilding rapidly. The country is experiencing a massive development drive with many investors seeking business opportunities.

Sri Lanka’s tourism appeal continues to be recognized and the country was ranked among the ‘top-10 coolest countries’ in the world to be visited in 2015 by Forbes magazine.<sup>68</sup> Tourism sector growth prospects remain encouraging and the most progressive sector of Sri Lanka’s economy, registering a growth of almost 30% annually.<sup>69</sup> Today, Sri Lanka’s potential as a meetings destination has vastly improved and there are plans to profile the Emerald Isle as the business tourism hub in the Indian Ocean. On its way to achieving this target, the second international airport in Sri Lanka, Mattala Rajapaksa International Airport (MRIA) has opened in the southern coastal town of Hambantota where the Magam Ruhunupura International Convention Center – the first purpose-built facility outside Colombo – welcomes conventions and events. Many international hotel chains are already planning to make their presence in the island and the flurry of development activities are taking place. According to the Sri Lanka Convention Bureau, in 2013, approximately 13.5% of the total number of MICE or business events participants attending local and international meetings came from overseas.<sup>70</sup>

68 Abel, A. (2014), ‘The 10 coolest places to visit in 2015’, *Forbes*, 25-11-2014 (online), available at: [www.forbes.com](http://www.forbes.com) (11-10-2016).

69 Daily News (2016), ‘France very important contributor to tourist arrivals’, *Daily News*, 03-11-2016 (online), available at: [www.dailynews.lk](http://www.dailynews.lk) (11-12-2016).

70 Kotelawala, H. (2015), ‘Unprecedented growth in MICE’, *Daily Financial Times*, 22-07-2015 (online), available at: [www.ft.lk](http://www.ft.lk) (24-04-2016).

The Bandaranaike Memorial International Hall hosted some 2,282 delegates attending the 44th ISAAME (Lions Club International India, South Asia, Africa and Middle East) Forum early December 2016.

One of Asia's most endearing, and enduring, meetings destination is finally on its way.

### 5.9.1 Sri Lanka SWOT snapshot and market segments

Strength	Weakness
Buoyed by a phased USD 1.5 billion funding pledge from the International Monetary Fund (IMF), Sri Lanka has its sights set on building economic momentum and improving investor sentiment. <sup>71</sup>	30-year ethnic conflict that had retarded economic growth, allowing Asian destinations to surge ahead in the meetings race.
Opportunity	Threat
Developing meetings activities in the Southern Region with the commissioning of the new airport in Mattala.	Sri Lanka needs to position itself in meetings activities with vigorous marketing.

#### Corporate incentive

Incentive planners will be spoilt for choice by Sri Lanka's diverse, off-the-beaten track incentive options which will offer unique memories made even more special by the people's gentle nature and cheerful disposition. When 1,600 employees of Philips India went to Colombo in 2015, it was the largest ever incentive group to visit Sri Lanka. With foreign arrivals up 18% in 2015 and expected to more than double by 2020, tourism is on track to become a major contributor to GDP.<sup>72</sup> On the back of such strong tourism growth, Sri Lanka's hotel stock grew by 35.7% in the three years to 2014, with further luxury developments in the pipeline for 2016.<sup>73</sup>

From April 2017, Sri Lanka will discard its policy of minimum room rates for hotels in Colombo ending a restriction put into effect in 2009 on five-star hotels that set a minimum room rate of USD 125 plus taxes<sup>74</sup>. This had resulted in a gross rate of USD 185 per night, inclusive of all taxes, while three-star hotel rates were set at a minimum USD 80–85 per night inclusive of taxes. The meetings industry believes that by sticking to the minimum rates, Sri Lanka has been pricing itself out of the meetings market and losing out to its regional competitors.

71 International Monetary Fund – IMF (2016), 'IMF Survey: Sri Lanka to reboot economic policies', 14-06-2016 (online), available at: [www.imf.org](http://www.imf.org) (11-12-2016).

72 Kuncinas, P. (2016), 'Sri Lanka Economy Infographic 2016: Island of Opportunity', blog, 16-05-2016, *Oxford Business Group* (online), available at: [www.oxfordbusinessgroup.com](http://www.oxfordbusinessgroup.com) (11-12-2016).

73 Ibid.

74 Times Online (2016), 'Sri Lanka to abolish minimum hotel room rates next year', 28-07-2016, *Times Online* (online), available at: [www.sundaytimes.lk](http://www.sundaytimes.lk) (11-12-2016).

### Association congress

The leading French travel association, the National Union of Travel Agents in France (Syndicat National des Agences de Voyages – SNAV) which represents about 1,300 travel related entrepreneurs of France decided to hold its 2016 annual congress (JEV 2016) in Colombo with the objective of promoting Sri Lanka as a venue for holding meetings. It is after an eleven-year hiatus that SNAV had picked a destination in Asia to host this major event, last being held in 2005 in Beijing. This is a huge morale booster for the industry and one that will translate into considerable growth in the French market over the next few years while also seeing growth of Sri Lanka's meetings segment. The meeting will also contribute in promoting Sri Lanka as an attractive destination for French tourists. France is one of the top-5 countries in tourist arrivals to Sri Lanka.

There is no shortage of bid wins – Sri Lanka has been chosen as the venue to host the Conference of Electric Power Supply Industry (CEPSI) 2017/18 by the Association of the Electricity Supply Industry of East Asia and the Western Pacific (AESIEAP) – and the nation is stepping up its ante quickly to recover lost ground.

#### Upcoming association meetings:

- CEO Conference of the Association of the Electricity Supply Industry of East Asia and Western Pacific – AESIEAP, October 2017 (estimate 200 pax)
- 22nd Conference on Electric Power Supply Industry – CEPSI 2018 (estimate 2,000 pax)
- 13 Asia Pacific Regional Conference World Association of Girl Guides and Girl Scouts and Friends of Asia Pacific Gathering, 2019 (estimate 200 pax)

### Exhibition

Exhibitions have performed well although lack of infrastructure still remains a challenge yet to be overcome in order to hold larger international exhibitions in Sri Lanka. However, most of the larger exhibitions which have now become annual events, commenced with the support extended by the government. A regular on the nation's exhibitions calendar is 'FACETS' Sri Lanka's annual International Gem and Jewellery Show which was established in 1991. 'FACETS' Sri Lanka is an impressive showcase of the Emerald Isle's top natural resource – gems – special focus on its primary resource, Ceylon Sapphires. The show also features specialised exhibits by gem dealers, lapidarists, exporters, wholesalers, manufacturers, and retailers, as well as machinery, equipment, tools, laboratory and certification services and educational and training services. The exhibition is organized by the Sri Lanka Gem and Jewellery Association (SLGJA) with the government's National Gem and Jewellery Authority (NGJA) and the Sri Lanka Export Development Board (EDB).

### 5.9.2 The rising phoenix

Sri Lanka's future looks promising as the island nation steps up its transformation process.<sup>75</sup>

- As the country looks to broaden its investor base, Sri Lanka hopes that policy changes and plans brought in by the new government will attract the added investment needed to help it reach growth goals;
- With foreign arrivals up 18% in 2015 and expected to more than double by 2020, tourism is on track to become a major contributor to GDP. Tourist arrivals rose by 221% between 2006 and 2015;
- Located on the main sea trade routes of Europe and Asia, Sri Lanka has become a leading shipping and trans-shipment hub;
- FDI has increased rapidly in recent years, with the majority of investments devoted to infrastructure. Inward FDI flows more than tripled in the decade to 2014; and the
- Number of hotel rooms grew at a CAGR of nearly 8% in 2011–2014.

### 5.10 Taiwan Province of China

Taiwan Province of China is widely recognized for its rapid industrialization and economic innovation. Taiwan Province of China's IT and communications, optoelectronics, semiconductor, and bicycle industries are highly competitive providing strong support for its meetings industry. From 2013 to 2016, the government gave the meetings industry strong backing when the Bureau of Foreign Trade (BOFT), under the Ministry of Economic Affairs, launched the Taiwan MICE Industry Pilot Programme or MEET TAIWAN. MEET TAIWAN is aimed at sharpening the destination's competitive edge in the meetings market and become a top meetings destination in the region. In 2014, according to MEET TAIWAN, its meetings industry grew 21% over the previous year with 544 meetings held. Top global hospitality brands which have focused on China and South-East Asia are now giving Taiwan Province of China a second look, this change being most visible in Taipei's five-star segment which is critical for attracting business travellers.

Sustainability is one of the core pillars in the destination's meetings strategies and the Green MICE Project under MEET TAIWAN began with low-carbon guidelines in 2012. The ISO 20121 sustainable event management concept was added in 2014, and carbon neutrality in 2015 to make the Project more meaningful. Since 2013, MEET TAIWAN has supported 15 conferences and exhibition adopting green practices. In 2015, this included the ATD Asia Pacific Conference, Taiwan Automation Intelligence and Robot Show and the International Conference on Nutrition and Physical Activity. Event organizers are incentivised and rewarded when they adopt the Green MICE guidelines. The Green MICE Project incorporates ISO 14064, PAS 2050 Carbon Footprint, and ISO 20121 international standards.

75 Kuncinas, P. (2016), 'Sri Lanka Economy Infographic 2016: Island of Opportunity', blog, 16-05-2016, *Oxford Business Group* (online), available at: [www.oxfordbusinessgroup.com](http://www.oxfordbusinessgroup.com) (11-12-2016).

### 5.10.1 Taiwan Province of China SWOT snapshot and market segments

Strength	Weakness
Strong manufacturing base and high level of research and development in medical, technology and scientific sectors, especially in 3C industries.	Its profile as a destination for meetings is not as recognized.
Opportunity	Threat
Improved cross Straits relationship between Taipei and Beijing opens doors to more trade, more opportunities and more meetings.	Strong and intense competition within the region and especially from those destinations with a head start.

#### Corporate incentive

Taiwan Province of China's historical and cultural heritage has made it a top draw for incentive planners. Large scale incentive tours by Amway and other direct sales companies have taken place in this destination which is considered fresh, different and waiting to be discovered. Although Taipei is still the main attraction for conference and incentive groups, Meet Taiwan has encouraged more diverse activities to highlight destinations beyond the capital city. Worldwide hotel brands in Taipei including Mandarin Oriental, W Taipei and Le Meridien are helping to boost the incentive market. Greater China is its largest source market with corporate clients including Jollibee China, China Perfect and Infinitus. Infinitus (China) Company brought 5,600 incentive participants in April 2016, making it the largest group this year.<sup>76</sup> Other corporate clients included Charle Japan, Colgate/Palmolive Malaysia and Estee Lauder Singapore.

#### Association congress

Taiwan Province of China is a powerhouse for manufacturing and IT sector however the island is gradually building a reputation among association organizers thanks to a strong professional and academic community and the efforts of the city governments and the Bureau of Foreign Trade. This destination is highly regarded for its professionals and experts, technology, and R&D strength in various sectors including IT and medicine. The government provides assistance to meeting organizers in bidding, promotion and implementation of international congresses by offering subsidies, planning assistance and cultural performances. Key sectors offered support include conventions in advanced IT and biotechnology development and industrial innovation.

##### Upcoming association meetings:

- 41st World Hospital Congress, November 2017, Kaohsiung (estimate 2,027 pax)
- 11th Asia Pacific Heart Rhythm Society Scientific Session & Asia Pacific Atrial Fibrillation Symposium, Taipei, October 2018 (estimate 2,376 pax)
- 112th Annual Convention of Rotary International, June 2021 (estimate 36,000 pax, and second time held here)

76 Lui, P. (2016c), 'Taiwan gets future-ready', *TTGmice*, 11-2016 (online), available at: [www.ttgmmice.com](http://www.ttgmmice.com) (11-12-2016).

## Exhibition

Thanks to favourable government policies, Taiwan Province of China has some of the world's most developed industrial clusters which are conducive for hosting international exhibitions as these clusters group vertically integrated manufacturers, offer complete supply chains and provide sophisticated logistics. This advantage has greatly sharpened the destination's global competitiveness as a meetings destination.

This advanced industry base has resulted in over 80 annual exhibitions representing sectors ranging from IT/electronics, machinery, bicycles, automobiles, sports, food, stationery, and giftware, to medicine, healthcare, and others. Many have become world names such as Computex Taipei, the second largest ICT show in the world, and largest in Asia. There were over 1,000 Taiwanese companies that exhibited at COMPUTEX 2016. Big-name companies and SMEs (small and medium enterprises) were there, and they have transformed their services from single hardware production to be more application and integration-oriented i.e. from a manufacturer in a supply chain to a major member in global Internet Computing Ecosystem.

Incidentally, TAITRA, the Taiwan External Trade Development Council, was awarded the 2014 UFI Marketing Trophy for its entry that focused on the application of a total mobile marketing solution for their Computex event.

Taichung Bike Week is another success story which has capitalised on the industrial clusters in Taichung and Changhua County where more than 1,000 companies are involved in the bicycles and bicycle components industry. In February 2016, Taipei, with the support of the European Cyclists Federation, hosted the "golden triangle" of bicycling events – the Velo-city Global conference, Taipei International Cycle Show and Tour de Taiwan. "ECF had at least these three very good reasons to bring the Velo-city Global to Taipei: the link to the Taipei Cycle Show, the ambition of Taipei City and the leadership of the city government and the bicycle industry here", said Bernhard Ensink, Secretary General of the European Cyclists' Federation.<sup>77</sup> Kaohsiung saw the grand opening of its Kaohsiung Exhibition Center in April 2014 while in Taipei, the construction of a second exhibition space for the Nangang Exhibition Hall will be completed in 2017. The combined halls will collectively be able to contain 5,000 booths in the Nangang area and relieve the space crunch confronting major international exhibitions including Computex Taipei. UFI reported that in 2015, its exhibition market grew 2.2%.<sup>78</sup>

### 5.10.2 Kaohsiung: master makeover

During the boom of the 1960s through 1990s, Kaohsiung was the industrial and shipping hub. As Taiwan Province of China moved from an agricultural to a manufacturing economy, Kaohsiung became the largest industrial city on the island and, since it grew without benefit of urban planning at that time, its Love River became the dumpsite of industrial waste. The Kaohsiung City government has since invested heavily in a new direction for the city – from polluter to reformer.

77 Oschabnig, K. (2016) , 'Velo-city Global 2016 – Evolution of Cycling', bike citizens, 15-02-2016 (online), available at: [www.bikecitizens.net](http://www.bikecitizens.net) (11-12-2016).

78 The Global Association of the Exhibition Industry (2016b), 'UFI releases new report on the Trade Fair Industry in Asia', press release, 21-07-2016, UFI (online), available at: [www.ufi.org](http://www.ufi.org) (09-12-2016).



It was therefore apt that Kaohsiung was the site of the Asia Pacific Cities Summit (APCS) “Reshaping the Urbanomics of Cities – Challenges and Solutions” in 2013, hosting some 1800 representatives from 132 cities around the world. APCS is largely recognized as one of the premier forums for fast-tracking international city networks and new business relationships. The Summit was not only a leading platform for regional issues, but also a generator for market cooperation between local governments and business sectors and resulted in forward momentum for Taiwanese cities to improve branding and marketing strategies and their international image.

The Kaohsiung City Government went on to establish a meetings promotion office in 2013 and has begun to attend international meetings trade shows in an attempt to raise the city's profile on the global platform. It commissioned eight meetings ambassadors and set-up the Kaohsiung MICE Alliance which is supported by 90 partners. A waterfront redevelopment project in Kaohsiung with a convention centre as the centrepiece has transformed the port city. The Kaohsiung Exhibition Center (KEC) which opened in April 2014 hosted its first international luxury boat show. KEC has potential to host marine-related trade events as it is located along a deep natural harbour and allows boats to be brought into the exhibition space. The New Bay Area has already been transformed from industrial warehousing into a business and leisure hub. A new port terminal will cater for cruise liners and a music and cultural centre is due to open in 2017. There is also a new economic focus towards high tech manufacturing, tourism and meetings.

The city has done well to capitalise on its assets – superb harbour, favourable climate, proximity to Hong Kong, China; and Mainland China, as well as to South-East Asia, competitively priced when compared to Taipei, strong industrial base and workforce, and a supportive citizenry – to bolster its meetings industry. It has successfully overcome its environmental pollution and the city's blue collar, unsophisticated image and developed its own identity and future based on the advantages it possess. Its efforts towards urban transformation, digital content promotion, and cultural and creative industry development have been attracting more meetings to Kaohsiung. The Concours Mondial de Bruxelles, a leading annual wine and liquor tasting competition based in Belgium, chose Kaohsiung as its first-ever venue outside Europe, showcasing not only award-winning spirits, but also Kaohsiung's spirit which has triumphed over the odds to take its place as 'Asia's Rising Star'.

In 2017, among others, Kaohsiung will host the 22nd Asian Conference on Occupational Health, 12th Asia Pacific Conference on International Education and 19th Congress of the Asia Pacific League of Associations for Rheumatology.

## 5.11 Thailand

Situated in the heart South-East Asia, Thailand serves as a gateway to the emerging economies of the Greater Mekong Subregion. With its well-developed infrastructure, political and social stability, and consistent openness to foreign investment, it has been a magnet for overseas companies looking for a strategic location to set up or expand business. Business travel to Bangkok is proving to be resilient despite the turbulence in the global economy, and players are pointing to Thailand's diversified economy which continues to bring travellers to the Thai capital. Leveraging on two winning factors – its strategic location in South-East Asia and the recent establishment of the ASEAN Economic Community (AEC) in late 2015, the Thailand Convention and Exhibition Bureau (TCEB) launched its 'Thailand CONNECT... Our Heart Your World' campaign to reassert Thailand



as the business destination at the heart of ASEAN. This campaign focuses on the diversity of destinations within Thailand; the chance to optimise business opportunities within the AEC; and the development of high quality professionals in its meetings industry.

When ASEAN fused to become the AEC, the region became a single market and a production base with strong institutional mechanisms for trade and investment. Businesses, including those in the meetings industry, will benefit from the free flow of goods, services, capital and talent, and strengthen the region's position in global supply chains.

There are five officially designated MICE Cities under Thailand's MICE City Development Project using the following criteria: meetings infrastructure; ground transportation; local amenities and facilities; supportive government policy towards meetings; and tourist attractions. There are currently three levels of designated MICE cities i.e. domestic/local (KhonKaen and Pattaya); national (Chiang Mai and Phuket) and international (Bangkok) and work is in progress by each city government as they aim to elevate their standing. As an example, although now considered a domestic destination, there are plans and steps taken to grow Khon Kaen's status. It is the largest commercial city and industrial development centre in a region which is now the primary focus of the government's East-West Economic Corridor (EWEC) scheme. Khon Kaen was recently honoured when it was elected to host a technical visit for UNWTO officials and delegates following the official World Tourism Day celebrations in Bangkok on 27 September 2016. The EWEC plans to connect Thailand with four neighbouring countries – namely China, Viet Nam, Lao People's Democratic Republic, and Myanmar – through Khon Kaen, establishing it as a hub of commerce, investment, and transportation and as the region's prime destination for Indochina's and southern China's convention and exhibition business. Khon Kaen is also shaping up as the heart of clean tech in Thailand following the government's approval of a "green" industrial estate; and the province is home to the northeast's largest convention venue (within the campus of Khon Kaen University), numerous five-star hotels, and an international airport. All these attributes are contributing to its ability to attract investment – and meetings – to the city and the province.

### 5.11.1 Thailand SWOT snapshot and market segments

Strength	Weakness
Thailand's location makes it a springboard to its rapidly emerging neighbours in ASEAN and the Greater Mekong Subregion (GMS).	Outside Bangkok, the MICE Cities do not have a long-term sustainable plan to develop their meetings industries, resulting in a high dependence on the national bureau TCEB to carry the torch.
Opportunity	Threat
Thailand is the leader in ASEAN Collaboration (AEC+GMS FTA agreement) and regional partnerships strategically leveraging on AEC will mean new business opportunities involving collaboration between ASEAN countries.	The Kingdom is recovering from the political tensions of 2013 and 2014 which put the country under the global spotlight that affected its image.

## Corporate incentive

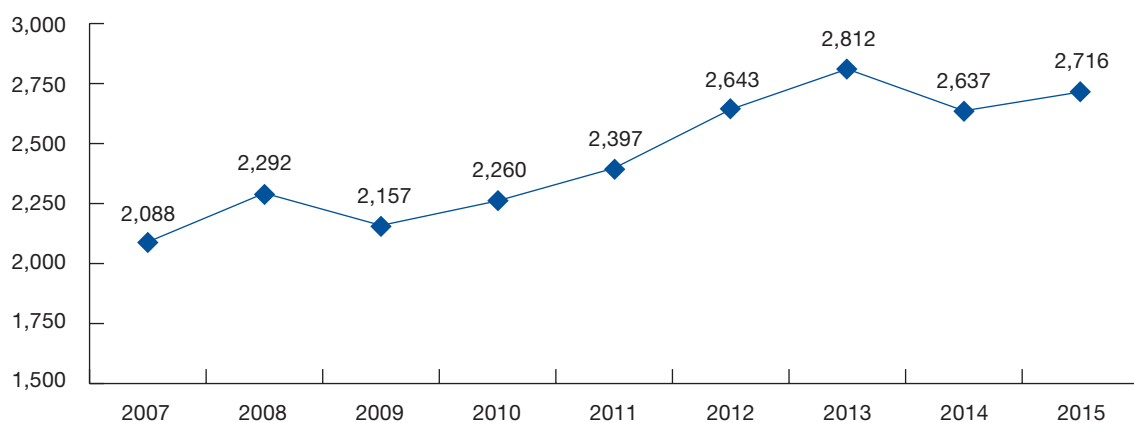
Thailand has done exceptionally well as an incentive destination for many decades with Bangkok, Phuket and Chiang Mai providing exotic and unique destinations for this segment, and with emerging hubs offering a myriad of experiences be it history, culture, luxury or adventure. In its effort to further promote the corporate incentive travel sector in 2016, under its WIN Strategy, TCEB is focusing on attracting mega-size events with more than 2,000 international delegates by establishing the Thailand Big Thanks! financial subsidy campaign. China is among TCEB's key target markets. The bureau recently supported more than 14,000 delegates to join the Infinitus Overseas Training 2016 in May, which has been held in Thailand for 13 years.

Another support package is TCEB's "Thailand Connect Beyond the Capital" for corporate groups holding their meetings and incentive events outside Bangkok and flying with Thailand's domestic airlines. This deal is a double winner with the participants having the chance to discover Thailand's other cities while being eligible for a subsidy when there are at least 100 delegates in the group and staying a minimum of three nights.

## Association congress

Thailand's association congress segment has shown tremendous resilience. The government has increased efforts to provide reassurance and comfort to its meetings visitors including the establishment of a priority "MICE lane" to facilitate and expedite immigration process for VIP business travellers. Thailand's main association base is located in Bangkok which is where there is a heavy concentration of conventions and exhibitions being held. Among others, Bangkok is the seat of the Secretariat of the UN Economic and Social Commission for Asia and the Pacific (ESCAP), the Asia and the Pacific regional offices of the Food and Agricultural Organization (FAO), the International Civil Aviation Organization (ICAO), the International Labour Organization (ILO), the International Organization for Migration (IOM), the International Telecommunication Union (ITU), the UN High Commission for Refugees (UNHCR), and the United Nations International Children's Emergency Fund (UNICEF).

Figure 5.6 Number of conventions and congresses in Thailand, 2007–2015



Source: TCEB website.

Association congresses taking place in Thailand are eligible to benefit from TCEB's "Convene in Paradise" support programme if they are in any of the five 'Focus Industries' with a minimum attendance of 500 international delegates. The five industries are: Health and Wellness, Energy, Food and Agribusiness, Infrastructure and Logistics, and Automotive and Electronics.

#### Upcoming association meetings:

- Asia Pacific Regional Conference of the World Organization of Family Doctors November, 2017, Pattaya (estimate 1,863 pax)
- 34th Congress of the Asia Pacific Academy of Ophthalmology, March 2019, Bangkok (estimate 2,500 pax)
- International Rubber Conference, 2025 (estimate 789 pax)

## Exhibitions

Thailand is positioning itself as the springboard to the 'ultimate market place' – ASEAN. Seamlessly linking ASEAN through its upgraded infrastructure development plan, Thailand is taking its place as a regional connectivity capital by offering easy access to the region's dynamic marketplace including the fast growing ASEAN Economic Community (AEC) and Greater Mekong Sub-region (GMS), a newly emerging market offering great business potential, covering Cambodia–Lao People's Democratic Republic–Myanmar–Viet Nam (CLMV). Thailand's industries have shown potential and are increasingly connected with the CLMV through growing trade and tax incentives, as well as investment. TCEB's ASEAN MICE Collaboration initiative has linked up exhibitions in Thailand with the integrated trading market of the AEC, further connecting them to the global supply chain. Thailand's six free trade agreements (FTAs) with Australia, China, India, New Zealand and the ten member countries of ASEAN have made the country an even more attractive marketplace for exhibitions. These have made the country a regional trade centre and a production and export powerhouse for various industries, the most notable being automotive, energy, and agro-industries.

Under its "EXtra Advantage" support programme, TCEB offers a range of services and support for international exhibitions and trade shows staged in Thailand. These include incentives for business matchmaking appointments; hosted accommodation for qualified buyers; and site inspections, feasibility studies and introductions to industry and government contacts.

The exhibitions sector is a key focus and platform for local industries to expand trade and investment and the Thai government, through TCEB, anticipating growing demand in the region, is promoting investment, research and development in selected key industries like healthcare services encompassing medical services, medical devices and pharmaceutical sector. Thailand's goal is to consolidate its position as the regional's emerging marketplace for trade shows in the health and wellness industry.

The ASEAN Rising Trade Show (ART) campaign initiated in 2015 by TCEB aims at helping rising trade shows in five major industries reap the benefits of regional economic integration brought about by the AEC. The support from the ART campaign will help raise the shows' profile to become the ASEAN leader of its kind. In 2016, two international exhibitions in healthcare and wellness sectors were chosen to gain support from the ART campaign – Thailand Lab 2016 and Beyond Beauty ASEAN-Bangkok 2016.

### 5.11.2 Capabilities development

A visionary outlook and the quiet determination to excel have led to Thailand's focus on investing in human resource development. Whether it is young graduates, experienced practitioners or the newly created MICE Cities, Thailand through TCEB's MICE Capabilities Development Department<sup>79</sup> is focused on a generation of professionals who will continue to grow its meetings:

**MICE Academy, targeting universities and colleges:**

- Development of a specialised curriculum that builds on existing tourism studies by incorporating specific modules on MICE management, language proficiencies and practical work experiences. In 2012, the MICE Course Board published Asia's first meetings curriculum textbook *Introduction to the MICE Industry* in both Thai and English;
- Coach the Coaches to bring university lecturers up to speed with the latest knowledge on meetings and the supporting curriculum; and
- Academic exchange programme for lecturers, students and researchers to participate in an exchange programme with universities in the Republic of Korea, Taiwan Province of China and Australia, with more in the pipeline.

**Trade Education for Thai and ASEAN meetings professionals:**

- Working with international trade organizations like UFI, IAPCO and MPI to bring training courses to Thailand;
- National trade associations Thailand Incentive and Convention Association (TICA) and the Thai Exhibition Association (TEA) offer professional training programmes, seminars and workshops to their members; and
- Assist the five MICE Cities to develop their capabilities and competency.

**Leveraging on the ASEAN Economic Community (AEC):**

- A roadmap operations manual for Thai SMEs, entrepreneurs and event planners on how to optimise opportunities that are now available through this new single and huge market; and
- MICE Intelligence Center which will offer industry reports, guidelines and standard operating procedures, meetings publications so that the Thai meetings industry will have access to fresh data, regional and global trends, statistics and knowledge that will make them better prepared for the future.

### 5.11.3 Chiang Mai

Chiang Mai, the largest city of Thailand North region, is long known for its rich cultural heritage and the "Rose of the North" is popular among visitors to Thailand. However, it is now on its way to play an additional role as one of Thailand's specially selected MICE City, and one of the meetings industrial hubs in the ASEAN region. After the Chiang Mai International Convention and Exhibition Center Commemorating His Majesty's 7th Cycle Birthday Anniversary (also known in short as the Chiang Mai International Convention and Exhibition Center – CMECC), began operations in 2013, the province has welcomed even more meetings visitors. CMECC is located only 15 minutes from the city centre, making convenience and accessibility the key to Chiang Mai's appeal for regional and international meetings.

<sup>79</sup> Thailand Convention and Exhibition Bureau (2014b), *MICE Capabilities: Overview* (online), available at: [www.businesseventsthailand.com](http://www.businesseventsthailand.com) (12-12-2016).

A five-year Chiang Mai MICE Destination master plan is being implemented with the vision to make Chiang Mai a hub for meetings in ASEAN. In the first phase in 2013, emphasis was placed on domestic meetings and infrastructure improvements and human resource training.

In the second phase, carried out from 2014 to 2015, destination promotions will leverage on regional cooperation blocs such as the Greater Mekong Subregion or GMS, and the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation, or BIMSTEC. The Chiang Mai Chamber of Commerce believes that the rapid development of regional cooperation frameworks such as ASEAN and BIMSTEC will lift the demand for meetings in member countries and benefit Chiang Mai which sits strategically in the centre of the region. In the third phase, from 2016 to 2017, Chiang Mai will see its status upgraded as a destination capable of hosting international conferences and be promoted as a Thailand Global MICE City.

As one of Thailand's MICE Cities, Chiang Mai has racked up a good track record to justify its credentials. Since January this year, it has 18 international association meetings as qualified by ICCA on its books. Success continued when the city won the 29th International Society of Sugarcane Technologists Congress slotted for December 2016. Not only will the city and region reap the economic benefits when 1,500 delegates from 80 countries converge here, Thai farmers will get the opportunity to pick up the latest trends and technology in sugarcane farming and production. The Thailand Society of Sugarcane Technologists (TSSCT) will showcase Thailand's local knowledge in this area through pre and post congress technical tours to the KhonKaen Agricultural Research and Development Center at KhonKaen University; the MitrPhol Sugar Cane Research Centre and selected sugar mills in Sukhothai and NakhonSawan provinces. The TSSCT expects hosting the 2016 Congress will lead to positive changes in the Thai sugarcane and sugar industries and drive Thailand to become a leader in sugar production and an export hub in ASEAN.

## 5.12 New generation destinations

Asia's next generation players will be the CLMV countries – Cambodia, Lao People's Democratic Republic, Myanmar and Viet Nam. These countries have experienced rapid economic growth and attracted an influx of foreign investment because of their low wages, trade privileges and the abundance of natural resources. The CLMV economies are currently going through important transitions driven by urbanization, young populations, a rising middle class, and the governments opening up their economies to foreign direct investment. While in a relatively infancy stage, the meetings industry will play a key role in the socio economic transformation of these nations. Of these four countries, Viet Nam has been earmarked as Asia's hot new meetings destination, but increasingly, the others are also gaining popularity as attractive leisure destinations.

On the tourism front, at the 20th Greater Mekong Subregion (GMS) Ministerial Conference held in Nay Pyi Taw, Myanmar in 2015, a new marketing strategy was introduced. Named the Experience Mekong Tourism Marketing Strategy and Action Plan 2015-2020, the initiative focuses on joint tourism marketing by GMS countries – Cambodia, Lao People's Democratic Republic, China, Myanmar, Thailand and Viet Nam. Work has formally begun on a 417 km long railway connecting China's southern city of Kunming to Thailand's northern frontier at Nong Khai and passing through Lao People's Democratic Republic at key cities including capital Vientiane and Luang Prabang, opening up new possibilities. While the focus is now on development of thematic multi-cultural tour programmes and the promotion of multi-country itineraries including an emphasis on secondary

destinations, in the foreseeable future, this cooperation and promotion will extend to the meetings market and will raise the profile of the GMS as meetings destination with quality services for meetings, incentives and exhibitions.

### 5.12.1 Cambodia

The temples at Angkor Wat form the world's largest religious monument and a major tourism draw to Cambodia where Textile, Tourism and Agriculture are its key economic sectors. The meetings industry in Cambodia is in a fledging state. Its purpose built facility Diamond Island Convention and Exhibition Center opened for business in 2012 in Phnom Penh and caters mainly to local exhibitions. The Koh Pich City Hall is an alternative venue and popular with workshops, wedding receptions and parties. In 2014, Cambodia hosted the PATA Travel Mart and the 5th University Scholars Leadership Symposium with 1,000 university students from 48 countries; and in 2015, the World Conference on Tourism and Culture. The Ministry of Tourism Cambodia hopes to develop a National MICE or Meetings Industry Strategy and promote meetings as a new product and nation transformer through new knowledge, new investment and a new global profile.

There are several reasons why Phnom Penh is becoming more and more competitive: its strategic location in South-East Asia, pro-business government, construction boom and most importantly much lower cost when compared to some other Asian destinations. It has been reported that Cambodia and India have again pledged to establish direct flights between the two countries.<sup>80</sup> Currently most traffic to the Mekong region is routed through Bangkok. Trade stakeholders are hoping that flights between the capitals New Delhi and Phnom Penh will attract more trade and facilitate business travel.

#### Upcoming association meetings:

- 26th World Economic Forum on ASEAN, May 2017, Phnom Penh (estimate 400 pax)
- 12 IEEE Conference on Industrial Electronics and Applications, June 2017, Siem Reap (estimate 362 pax)
- 14th Conference of the International Association of Genocide Scholars, July 2019, Phnom Penh (estimate 200 pax)

### 5.12.2 Lao People's Democratic Republic

The meetings industry is beginning to develop in Lao People's Democratic Republic although the country has experience hosting several regional events such as ASEAN Tourism Forums 2004 and 2013 and SEA Games 2009. Venues to host meetings include the Lao International Trade Exhibition & Convention Center (ITEC), the International Cooperation and Training Centre (ICTC), the National Convention Hall and some four to five-star hotels with conventions and meetings facilities. This destination has challenges which include lack of a national development plan, lack of infrastructure, lack of funding, and the meetings industry is still new.

---

80 Runcie, A. (2015), 'India direct flights back in the mix', *The Phnom Penh Post*, 04-09-2015 (online), available at: [www.phnompenhpost.com](http://www.phnompenhpost.com) (11-12-2016).

Earlier this year, more than 500 delegates from over 50 countries attended the International Water Resources and Hydropower Development conference in Vientiane focusing on water resources and hydropower development across Asia. The conference centred on the development and engineering of regional hydropower with China, India, the Russian Federation, Malaysia and Pakistan boasting some of the largest dams and power plants globally. Among the highlights was Asia's potential in developing clean renewable energy, with the associated water storage seen as providing benefits to local communities. Key industries here are Hydropower, Tourism, Garment, Agriculture and Mining (copper and gold), and Lao could do well hosting conventions in these fields. Having hosted the 13 ASEAN Leadership Forum in August 2016, Vientiane, its capital city, will host the 17 ASEAN Youth Cultural Forum in 2019. This nation also hosted the ASEAN Ecotourism Forum and the 28th ASEAN Summit this year.

### 5.12.3 Myanmar

Myanmar has become a promising venue for its meetings industry. Myanmar has a young, affordable workforce and friendly business environment, with infrastructure for venues, banking, transportation and communication starting to mature. Improved infrastructure and communication systems will attract more foreign investment which will bring with them business meetings. Its key sectors are tourism, agriculture, oil and gas, and mining.

Myanmar has successfully hosted the 27th SEA Games in December 2013 and Para SEA Games in January, 2014 at WunnaTheikdi Stadium in Nay Pyi Taw, its Administrative Capital City. Before 2011, Myanmar had not developed its meetings market due to imposed sanctions. Its meetings industry is small and dominated by local corporate, NGO and government meetings. In 2013, the country hosted the World Economic Forum (WEF) on East Asia, promoting the country as a new "frontier market" for international investors. The WEF involved 1,000 participants from 50 countries. The three-day meeting included 550 business leaders from more than 60 global companies, such as General Electric, Visa, Coca Cola, Unilever, Mitsubishi, Tata Motors, Chevron and Woodside Petroleum.

Exhibitions catering to foodstuff, furniture, IT automobiles and construction are the norm. The two main venues are the Myanmar Convention Centre in Yangon and the Myanmar International Convention Centre in Nay Pyi Taw. There are only limited incentive groups arriving in Myanmar, with organizers citing lack of experienced event service partners, a very embryonic creative industries sector, a lack of reliable energy supply and currency restrictions. Myanmar has entered into a partnership with the Thailand Convention and Exhibition Bureau to gain experience and support from a big player in the business industry and this will help Myanmar gain a reputation for being a destination for business as well.

#### Upcoming association meetings:

- 15 ASEAN Ports and Shipping, July 2017, Yangon (estimate 468 pax)
- 16 ASEAN Pediatric Federation Conference, September 2017, Yangon (estimate 400 pax)
- 14th World Chinese Entrepreneurs Convention, September 2017 (estimate 3,342 pax)



#### 5.12.4 Viet Nam

According to Viet Nam's "Overall plan for Tourism development until 2020, with a Vision to 2030" tourism will be a key economic sector which is modern and professional and tourism products will be of high quality, diversity and prestige. By 2020, Viet Nam hopes to be able to compete with other countries in the region and welcome 10.5 million international tourists. According to Viet Nam National Administration of Tourism (VNAT) in 2015, total international arrivals in 12 months reached 7.9 million arrivals, an increase 0.9% over 2014. Director General of the Viet Nam National Administration of Tourism (VNAT) Nguyen Van Tuan said that legal documents and policies on tourism development and visa relaxation have facilitated travel in ASEAN, noting that the transparent and favourable investment climate in Viet Nam, along with better coordination among sectors, has met regional integration requirements.<sup>81</sup>

The meetings sector is one of Viet Nam's priority tourism products which will be developed in line with the Vietnam Tourism Development Plan to 2020, and Vision to 2030, as well as Vietnam Tourism Marketing Strategy to 2020.<sup>82</sup> All the big hotels in the main cities such as Ha Noi, Ho Chi Minh City, Da Nang will be equipped with meetings infrastructure and facilities to service this industry while VNAT will reinforce marketing activities and cooperation with its neighbours. Viet Nam's meetings suppliers believe that more needs be done to stimulate its growth especially when the prospects are very bright.

With the economy improving – the Vietnamese Government has set a target of 6.5% to 7% for the 2016–2020 period<sup>83</sup> – there is a renewed demand by businesses for exhibitions, meetings and events. Just one example – according to the research noted in *Markets of the Future: ASEAN in 2020* from Euromonitor International, Viet Nam is at the top of Asia's fastest growing beauty and personal care markets,<sup>84</sup> and show producers are confident that domestic and international exhibitors and buyers will flock to their related trade shows. One of Viet Nam's key sectors is manufacturing. The country's automotive market has great potential and full of opportunities in automobiles, auto parts and accessories. The first edition of Automechanika Ho Chi Minh City, jointly organized by Messe Frankfurt, Chan Chao International Co Ltd and Yorkers Exhibition Service Vietnam, will debut in March 2017 at the Saigon Exhibition and Convention Centre.

The key conventions and exhibition venues in Viet Nam are the National Conference Center in Hanoi and Saigon Exhibition and Convention Center in Ho Chi Minh City. While these two cities are generally first-choice considerations for meetings, Danang and NhaTrang are increasing in popularity as add-ons to city events or stand-alone primary incentive locations. In Hanoi, a new facility – the National Exhibition and Trade Center will add a gross floor area of more than 600,000 m<sup>2</sup>. Many luxury hotel chains have expanded their reach to Viet Nam setting up in Hanoi,

81 Viet Nam National Administration of Tourism (2016), 'Viet Nam becomes global destination thanks to ASEAN integration', Ministry of Culture, Sports and Tourism, 16-02-2016 (online), (13-12-2016).

82 ASEAN Tourism (2015), 'Viet Nam prepares for dynamic tourism growth', press release, 31-07-2015, ASEAN Tourism (online), available at: [www.aseantourism.travel](http://www.aseantourism.travel) (11-12-2016).

83 The Star Online (2016), 'Vietnam sees 2016 GDP growth slowing to 6.3%', *The Star*, 09-12-2016 (online), available at: [www.thestar.com.my](http://www.thestar.com.my) (11-12-2016).

84 Lee, C. (2015), 'Markets of the Future: ASEAN in 2020', *Euromonitor International* (online), available at: [www.euromonitor.com](http://www.euromonitor.com) (11-12-2016).



Hue and Ho Chi Minh City, bringing world-renowned luxurious accommodation to the country and offering corporate event planners a range of spaces ideal for meetings.

On the conventions side, Viet Nam has hosted key events such as the 2010 World Economic Forum, APEC 2006 and ASEAN Summits, Interpol General Assembly 2011 and AdAsia in 2013. In 2015, Viet Nam hosted 38 association meetings in line with ICCA's criteria. The Viet Nam MICE Club is a private sector-led effort formed in 2003 to promote meetings to Viet Nam. The organization attributes insufficient industry infrastructure and accessibility and the lack of innovation in meetings products and services, including lack of government attention and funding as key challenges to the growth of the industry in Viet Nam.

**Upcoming association meetings:**

- Asia Pacific Regional Internet Conference on Operational Technologies, March 2017, Ho Chi Minh City (estimate 783 pax)
- Asian Mycological Congress, October 2017 (estimate 487 pax)
- 22nd WFN World Congress on Parkinson's Disease and Related Disorders, November 2017, Ho Chi Minh City (estimate 1,937 pax)



---

## Chapter 6

### Convention centres: gearing up for the future

#### Summary

This chapter gives an overview of convention centres being planned, in the process of completion or under refurbishment and renovation in Asia. Convention centres can be considered tools of economic development all year round and hubs of knowledge when a convention comes to the city. Today, the old “build and they will come” adage does not hold water. The development of purpose-built facilities must take into account key criteria through a feasibility exercise which analyses its potential demand among other things; design reviews so that the facility meets the needs of business events; and keeping in mind what venues of the future need to offer their users. The “More than Bricks and Mortar” story will give some examples about how convention centres are no longer just four walls hosting conventions and exhibitions.

#### Key words

- Convention and exhibition centres; and
- Trends.

#### Key message

- Trends affecting convention centres include the broader demand for technology, increased usage of public space and flexible networking arrangements;
- Many business events are changing their formats to better serve their participants;
- Venues need to adapt to the new environments which are driven by their customers’ needs; and
- There is an influx of new convention and exhibition venues in Asia and the Pacific region.

Convention centres are major drivers and tools of economic development in their respective cities, but they are also big investments in infrastructure that shape the form and function of the city in important ways. Some countries, notably China, began by constructing large numbers of exhibition centres which had varied abilities to serve also as convention venues. China is now beginning to develop purpose-built convention centres. Other countries developed integrated facilities with both convention and exhibition capacities. While focusing mainly on convention centres in this report, we hope it is helpful to also put Asia’s exhibition space into perspective.

According to UFI’s *Trade Fair Industry in Asia* report 2016, Asia’s exhibition venue capacity will exceed 7.8 million m<sup>2</sup> by the end of 2016 and the number of venues operating in Asia this year will reach 207, more than double the 100 venues that were in operation in 2004 when the first edition of this UFI report was published<sup>1</sup>. In 2016, China will be home to 108 venues and more than 5.5 million m<sup>2</sup> of gross indoor capacity, representing more than 70% of total capacity available in the region.

The International Association of Convention Centres (AIPC) recently conducted its annual *Members Survey: Diversification and Adaptation* where all members from around the world were surveyed

---

1 The Global Association of the Exhibition Industry (2016b), ‘UFI releases new report on the Trade Fair Industry in Asia’, press release, 21-07-2016, UFI (online), available at: [www.ufi.org](http://www.ufi.org) (09-12-2016).

between February and April 2016. It reported that AIPC members' revenue grew by 8% in 2015, the fastest growth ever tracked by this survey since it was first conducted in 2010.<sup>2</sup>

The survey goes on to report that due to ever increasing event producer and group requirements, as well as changes in technology, centre management teams have added an innovation or important new idea over the last two years. This innovation took various forms, ranging from online reservation systems to increased Wi-Fi bandwidth and connectivity to all inclusive packages and visitor tracking, just to name a few. The top-3 innovation areas were technology, food and beverage and the client venue experience. Many events are changing their formats to better serve more technology-savvy and informal attendees. Other trends reported are the increased usage of public space (e.g., lobby, reception) and different educational and networking formats.

## 6.1 The new world

Today, convention centres are more than just bricks and mortars or facilities to hold events as conventions, exhibitions and other types of events are morphing into more integrative, flexible and communicative versions.

“Conferences of today are no longer contained in the main convention hall but in many smaller breakout rooms and in networking sessions. In the old model, we may have to provide five breakout rooms for 200 delegates, but now it is about providing 200 spaces with furniture and coffee for five delegates in each area.”<sup>3</sup>

Geoff Donaghy, AIPC President and Chief Executive  
International Convention Centre Sydney – ICC Sydney

The planning, execution and evaluation of future meetings will have to foster networking and communications with a focus on “heightening the experience”. Structural boundaries blur between lecture halls, exhibitions, poster areas, foyers and catering areas. Technical requirements are getting more ambitious and complex with high demands on network and presentation technology. The availability of networking spaces and access to interactive technologies that will encourage audience participation and collaborative communication platforms are top considerations, just as natural lighting and healthy menus are to the wellness and productivity of participants.

<sup>2</sup> International Association of Convention Centres – AIPC (2016), *2016 Member Survey: Diversification and Adaptation* (online), available at: [www.aipc.org](http://www.aipc.org) (11-12-2016).

<sup>3</sup> Lee, P.Q.P. (2016), 'Meeting venues need to keep up with the times: PCMA', *TTGmice*, 29-07-2016 (online), available at: [www.ttg mice.com](http://www.ttg mice.com) (11-12-2016).

## 6.2 New trends

Today, conference organizers are increasingly looking at the newest trends to boost business and to improve the conference experience.

The following are a summary of the latest trends:

- Delegates are increasingly conscious about health and wellness. Besides offering quality meals, convention centres must be prepared to serve a diverse world audience that requires halal, kosher, vegan, gluten-free, allergen-free, low- calorie, low-salt and low-sugar options, etc.;
- Food can have an impact on concentration and energy levels;
- Interactive breaks that can be outdoors with fresh air and sunshine;
- Flexible space because venues need to accommodate events of various sizes and formats and maximise usage;
- Fast and accessible Internet connectivity so that digital tools can be used;
- Sustainability programmes which includes green building certification, sustainability initiatives and operations, certified green products and tracking event specific energy usage or water consumption;
- Offer different styles of seating and set-up that will add interest to the overall meeting experience;
- Networking space that will allow people to move around, meet each other and share ideas; and
- Integrated facilities or proximity to local restaurants and attractions for post-event get-togethers.

## 6.3 More than bricks and mortar

Visitors to **Singapore EXPO and MAX Atria** can enjoy complimentary Wi-Fi up to 2mbps. Event organizers may customise the bandwidth according to their requirements, to more than 15,000 concurrently active devices – the highest in Asia.

The **Kuala Lumpur Cultural Showcase** is a complimentary value add component to qualified meeting organizers. This Showcase comprises a presentation of eight Malaysian arts and crafts – batik painting, basket weaving, wood carving, songket weaving, metal work, henna painting, Chinese calligraphy and gamelan (traditional Malay orchestra) – is made available by the Kuala Lumpur Convention Centre. The venue received the Kuala Lumpur Mayor Universal Access Award 2013 for its commitment towards ensuring a user-friendly facility that is accessible to everyone.

The **Melbourne Convention & Exhibition Centre** is set on the banks of the iconic Yarra River, just a 20-minute drive from Melbourne International Airport and a very short stroll to the city centre where there are numerous cafés, eclectic restaurants, parklands, retail and fashion and galleries and museums.

The **Vancouver Convention Centre** has a six-acre living roof landscaped with more than 400,000 indigenous plants and grasses from 25 different species of the Pacific Northwest. Strawberries are grown on the roof which is also home to four beehives of honeybees which produces wildflower honey for use by the culinary team for exclusive treats and pastries.

**Tourism Vancouver** provides meeting organizers and local businesses with access to a range of energy conservation programmes and consulting services through its Sustainable Destination Specialist. Thirty hotels across the city are actively tracking energy and water use. Vancouver was honoured with the C40 Cities Award for 'Greenest City Action Plan' at the Paris COP21 climate conference.

The **Cape Town International Convention Centre** has been celebrating Youth Day for the last three years by hosting learners from Mitchell's Plain School of Skills and Lathi-Tha School of Skills. Both schools provide an alternative learning environment to youth and support them through skills and academic development. The Youth Day programme focuses on the power of young people to make a change in their community, city and country.

In the year ending June 2016, the **Hong Kong Convention and Exhibition Centre** collected more than 420,000 kg of unconsumed food and materials for recycling. 1,300 light tubes were replaced with motion sensing dimmable LED lighting and 1,900 kg of food was donated to charities like Food Angel.

### 6.3.1 Case study: better health prints – The Healthy Venues Award

In February 2016, the Scottish Exhibition and Conference Centre (SECC) in Glasgow (now renamed and rebranded as the Scottish Event Campus) became the first venue in the world to be accredited under the World Obesity Federation's Healthy Venue Awards programme. The Healthy Venues Award is part of World Obesity's Action Initiative to help people achieve and maintain a healthy weight.<sup>4</sup> The award focuses on steps that venues can take to support healthy eating and to encourage more activity. A recent survey of event organizers carried out by World Obesity found that some of the challenges faced when planning healthy menus for conferences include low availability and high price of healthy options. The venues work in partnership with the World Obesity Federation, looking holistically at the attendee experience, from healthy snacks in vending machines through to encouraging people to use the stairs rather than lifts.

Investments made by SECC to support a healthier event experience, or improved 'healthprint' for delegates include:<sup>5</sup>

- The establishment of a Healthy Venue Task Force to implement new healthy practices;
- A pioneering partnership with Nextbike to provide free bikes to conference delegates;
- Digital signs encouraging delegates to use the stairs or stand to applause in sessions;
- Access to route maps promoting walking, cycling, running and local health clubs; and
- Offering low fat, low sugar and low alcohol menu options.

4 World Obesity Federation (n.d), *Healthy Venues Accreditation*, World Obesity Federation (online), available at: [www.worldobesity.org](http://www.worldobesity.org) (11-12-2016).

5 Scottish Event Campus (2016), 'SECC becomes world's first official "Healthy Venue"', SEC (online), available at: [www.sec.co.uk](http://www.sec.co.uk) (11-12-2016).

### 6.3.2 Case study: sustaining a winning edge

As Singapore's largest exhibition and meeting space, the Marina Bay Sands Expo and Convention Centre (MBS) comprises 229 meeting rooms, South-East Asia's most expansive ballroom, and enough space for 2,000 exhibition booths. MBS is the first convention centre facility in South-East Asia to obtain the ISO 20121 Sustainable Events Management System certification. It is the single largest building in Singapore to be conferred the Green Mark Platinum Award by the Building and Construction Authority (BCA). MBS has been recognized as a 'Water Efficient Building' by the Public Utilities Board in Singapore for its water conservation efforts, which includes rainwater harvesting and low-flow water taps. Green materials comprising recycled materials and products under Singapore's Green Labeling Scheme were used during the property's construction phase. Non-toxic paints were used to reduce the amount of toxic fumes released into the air. Waste was sorted out into organic and construction waste for proper disposal and minimized wastage with recycling and reusing of wood, metal and excavated earth.

Through its Sands ECO360 philosophy<sup>6</sup>, MBS integrated best practices, technologies and methodologies in the area of sustainability across all properties and its meetings. In 2014, a total of 117 sustainability projects were implemented. These include resource conservation, waste management, ECO360 Meetings, team member engagement and training and sustainable procurement. It has a dedicated sustainability team that reports weekly to the Chief Operating Officer and is governed by a Steering Committee that is chaired monthly by the Senior Vice President of Operations. Each department has a Sustainability Ambassador to spread the environmental awareness message and encourage ownership within departments. Comprehensive training and competency assessment is provided for all team members as part of its ISO20121 certification. There are various sustainability activities to engage team members in a fun way e.g., monthly recycling drive, "Soap for Hope" and their quarterly "Ec-O-Pinion" contest among others. MBS offers meeting organizers sustainable options to achieve their green meeting goals through Sands Eco360 including a post event impact statement which includes energy, water, waste diversion and carbon footprint calculation. This allows their clients to benchmark themselves for future events. Additionally, a Green Harvest Menu offers sustainable food and beverage options, for example local and/or organic food, Fair Trade certified coffee, or fresh herbs harvested from its own garden.

---

6 Marina Bay Sands (n.d), *Sands ECO360 Green Meetings* (online), available at: [www.marinabaysands.com](http://www.marinabaysands.com) (12-12-2016).

## 6.4 Convention centres in Asia and the Pacific

The table below is by no means exhaustive and captures some of the known investments put into purpose-built convention centres in the Asia and the Pacific region.

Table 6.1 Refurbishments and new convention centre developments

<b>Australia</b>	Sydney	ICC Sydney sits in the heart of Sydney in a prime waterfront location in Darling Harbour. It will open in Dec 2016 and offer 35,000 m <sup>2</sup> exhibition space and 70 meeting rooms. The Hunger Games Exhibition will be its first public exhibition.
	Adelaide	Adelaide Convention Centre's East Building is scheduled for completion in mid-2017. Phase 1 of this redevelopment project – the West Building – opened for business in 2015.
	Hobart	Tasmania recently commissioned a feasibility study on a proposed convention centre in Hobart. Hobart has not been considered for many larger conferences, with only 12 in the past four years.
	Melbourne	The Melbourne Convention & Exhibition Centre will add nearly 20,000 m <sup>2</sup> of flexible, multi-purpose event space increasing its total size to over 70,000 m <sup>2</sup> . Construction is estimated to be completed in early 2018.
	Cairns	The Cairns Convention Centre has revealed a refurbishment programme valued at USD 10 million.
<b>China</b>	Suzhou	Part of the larger Suzhou International Expo Center, Suzhou Jinji Lake International Convention Center officially opened its doors on 18 March 2016.
	Shenzhen	The Shenzhen International Convention and Exhibition Center will cover a gross exhibition space of 400,000 m <sup>2</sup> . The first construction phase is scheduled to be completed in 2018. Phase 2 will see the construction of an additional 80,000 m <sup>2</sup> , making SIEC the largest venue globally.
	Hainan	The International Convention Center, Ocean Flower Island will have 108 meeting halls and capable of accommodating 20,000 people. This complex of 12 peony-shaped buildings is anticipated to open in 2017.
	Changsa	The 260,000 m <sup>2</sup> Changsha International Convention and Exhibition Center in Hunan province will open at the end of 2016/2017.
	Shenyang	The Shenyang New World EXPO (EXPO) just opened and will host China's Annual National Planning Conference 2016. EXPO is part of a massive multi-use complex located in Shenyang on the Hunhe River adjacent to the city's Golden Corridor. EXPO will be managed and operated by Shenyang New World EXPO Management) Ltd. (SML), a sister company to Hong Kong Convention and Exhibition Centre Management Ltd.
<b>India</b>	Guangzhou	GL Events has signed a joint venture agreement with the Yuexiu Group to build a new convention centre in Guangzhou. The opening of phase 1 is planned for 2019 and will feature 50,000 m <sup>2</sup> .
	Pune	The Pune International Exhibition and Convention Centre (PIECC) in Pune, the automobile manufacturing hub of India, is anticipated to open in 2017.
	Mumbai	The DhirubhaiAmbani International Convention and Exhibition Centre, part of a mixed development project that will include retail space, service apartments and hospitality facilities, will be ready by 2017.
	Jaipur	The Jaipur Convention & Exhibition Centre is operated by Accor.
	Goa	The Goa International Convention Centre project has been announced.
	Bangalore	The project has been announced and TATA Reality company will be the developer.
<b>India</b>	Visakhapatnam	The convention centre will be built at Madhurawada and will accommodate around 10,000 people and provide various services like an integrated sports complex.



<b>India</b>	Vijayawada	The Vijayawada International Convention Centre will be constructed in Amaravati. The mega project will have a convention centre with a capacity to accommodate 10,000 people, an exhibition centre, a five-star hotel and an amusement park.
	New Delhi	Delhi Dwaraka Convention centre with a capacity to seat 6,000 persons is over four times the size of VigyanBhawan.
	Gujarat	The project in Vadodara will include 2 exhibition halls, a conference hall and auditorium with capacity for 2,000 delegates and an open art gallery. Gujarat already boasts of the Mahatma Mandir Convention and Exhibition Centre in Gandhinagar the state capital that offers a total event capacity of 15,000 participants. A 2018 opening is being targeted.
	Kerala	Lulu Convention Centre Thrissur's expansion will mean that the venue's 2 halls can accommodate 600 delegates each.
<b>Indonesia</b>	BSD City, Greater Jakarta	Recently opened for business. Indonesia ICE – largest in Indonesia and one of the biggest in South-East Asia.
	Jakarta	Additional 10,000 m <sup>2</sup> at JI Expo.
<b>Japan</b>	Okinawa	New convention centre will open in 2020. Currently, the largest convention centre in the prefecture is the Okinawa Convention Center which offers seating capacity of 5,000.
	Aichi Prefecture	A convention centre will open in 2019 on the artificial island in Tokoname where Nagoya's airport, Chūbu Centrair International Airport, is located.
	Nagoya	Nagoya is planning to build a convention centre within the city itself. This venue will be at its port, and 2 km away from the existing convention centre, Portmesse Nagoya.
	Kyoto	The Kyoto International Conference Center will double its capacity by 2,000 m <sup>2</sup> . A further petition to further increase capacity to a total of 7,000 m <sup>2</sup> has been submitted.
	Yokohama	New convention facilities covering 20,000 m <sup>2</sup> located adjacent to the PACIFICO Yokohama Convention Center. Upon completion in 2020, the new centre combined with PACIFICO will allow for large-scale meetings of 5,000 pax to be held in both centres at the same time.
	Sapporo	Sapporo will conduct a feasibility study on market demand and potential for a convention centre.
<b>Malaysia</b>	Penang	Formerly known as the Penang International Sports Arena, the newly refurbished Subterranean Penang International Convention & Exhibition Centre (Setia SPICE Convention Centre) will offer the largest subterranean pillar less ballroom in Asia. Expected completion by 2017.
	Penang	Penang Waterfront Convention Centre – PWCC – will incorporate a convention centre, retail malls, hotels and a business district on a 152 acre waterfront area developed in accordance to the Green Building Index. Expected completion by 2019.
	Kota Kinabalu	Sabah International Convention Centre – SICC. Expected completion by 2018.
	Kuala Lumpur	Malaysia International Trade & Exhibition Centre – MITEC – will become Malaysia's largest exhibition venue comprising 12 halls and a total gross floor area of 93,000 m <sup>2</sup> . The government-owned facility has been identified as a hub for meetings under the "Greater Kuala Lumpur Plan." Set for completion mid/late 2017.
	Kuala Lumpur	At the Kuala Lumpur Convention Centre – KLCC, a new extension is being built and due for completion in 2017. It will provide 10,000 m <sup>2</sup> flexible space.
	Kuala Lumpur	Redevelopment and upgrading of Putra World Trade Centre.
	Shah Alam	The existing Setia City Convention Centre (SCCC) has completed its expansion with an additional 6,000 m <sup>2</sup> of gross exhibition space. The new Hall 1 and 2 will be able to accommodate 4,000 people in banquet style seating, or 8,000 theatre-style sitting.

<b>New Zealand</b>	Christchurch	A new convention centre will open in late 2019. The former Christchurch Convention Centre was demolished in 2012 following damage caused by the earthquakes which devastated much of the city and surrounding area in 2010 and 2011.
	Auckland	The New Zealand International Convention Centre's exhibition hall will be five times larger than SkyCity's current exhibition hall which is the largest in the country. Construction will be completed in 2019.
<b>New Zealand</b>	Wellington	The proposal that combines the Wellington Convention Centre and Movie Museum is awaiting approval. It is envisaged that the co-location will allow partnering opportunities. Wellington currently enjoys 14% of New Zealand's meetings market.
<b>Papua New Guinea</b>	Port Moresby	The National Convention Centre (NCC) was constructed by the China Railway Company as a gift from the Chinese Government to the people of Papua New Guinea. NCC opened in April 2016 and hosted the APEC Transportation Working Group and the APEC Business Advisory Group.
<b>Republic of Korea</b>	Goyang City	The Korea International Exhibition Centre – KINTEX is undergoing expansion. This will be completed in 2018. Since its opening in April 2005, KINTEX has undergone two of three scheduled expansions.
	Suwon City	New convention centre in Suwon City is scheduled for completion in 2018.
	Seoul	A new convention centre is planned next to the Seoul Station and anticipated to be ready by 2018.
	Pyeongchang	CVB has plans to convert the indoor sporting venues into a convention centre for 5,000 delegates after the 2018 Winter Olympics.
<b>Taiwan Province of China</b>	Taipei	Expansion of Taipei World Trade Center Nangang Exhibition (TWTC Nangang) which is anticipated to be completed by 2017 will increase the destination's capacity by more than 37,000 m <sup>2</sup> .
	Taichung	The Taichung Convention Center, which was commissioned by the government of Taichung City, is the first state-sponsored project in Taiwan Province of China. The Center will be completed by end of 2018.
	Taoyuan	The Taoyuan Aerotropolis International Convention and Exhibition Center is part of a huge development project in northern Taiwan Province of China which will turn Taoyuan into a major transportation hub and industrial centre with infrastructure for corporate R&D and logistics. The entire project will take about 1,520 years to complete.
<b>Thailand</b>	Bangkok	The Bangkok International Trade and Exhibition Centre's (BITEC) expansion project will provide 3 new exhibition halls and a new BHIRAJ Convention Centre, consisting of three convention halls and 12 meeting rooms. The scheme will also offer a mixed-use tower, as well as new retail and dining facilities and a direct link to the BTS Skytrain.
	Impact Arena	Impact Arena is also undergoing an upgrade including a link bridge between the exhibition hall and Impact Challenger, providing easy access between halls. A new four-storey retail building with prime exhibition space and food outlets is also under construction. The renovation project is expected to be ready in 2017.
<b>Viet Nam</b>	Hanoi	The Vietnam National Exhibition and Trade Center will have a gross floor area of more than 600,000 m <sup>2</sup> .

---

## Chapter 7

### China

#### Summary

This chapter is dedicated to China and its influence on the global meetings industry. Considering that China only entered the meetings industry as a player not too long ago, its progress and success thus far is not only a quantum leap, but also setting the bar for its competitors. Asia will have to compete with China in the region, but it should also leverage on China as one of the region's market leaders while optimising opportunities brought on by China's Belt and Road Initiative. Although there are many Chinese cities which are pursuing the meetings business, in this overview only three – Beijing, Shanghai and Hangzhou – are being profiled.

#### Key words

- Belt and Road Initiative;
- Key investment fields;
- Advanced research;
- High profile events;
- Chinese clans;
- China inbound tourism; and
- China outbound travel.

#### Key message

- The development of China's business community and their projects fuels a rapidly growing meetings industry;
- Although China leads in terms of exhibition space sold in Asia, with great growth potential;
- There is increasing competition, and business opportunities, coming from second tier destinations; and
- China's phenomenal growth in the outbound incentive travel has compelled many destination marketing organizations (DMOs) to have a focused strategy for the China outbound meetings segment.

China's economy has been significantly rebalanced with services, high-tech industries and advanced manufacturing becoming new engines of growth. With initiatives such as the Shanghai Free Trade Zone, China hopes financial services will be one of the key sectors of its economy. Services now make up 51% of its GDP.<sup>1</sup>

Key Chinese gateway cities will benefit from the steady growth in meetings, which will be largely fuelled by the domestic market. China's GDP growth of 6.9% in 2015<sup>2</sup> remains one of the fastest of any major economy in the world.

In October 2016, China's yuan was added to the International Monetary Fund's basket of reserve currencies<sup>3</sup> and joined the United States dollar, the euro, the Japanese yen and British pound in

---

1 China Daily Europe (2016b), '10 reasons to be optimistic', *China Daily Europe*, 26-02-2016 (online), available at: <http://europe.chinadaily.com.cn> (12-12-2016).

2 Magnier, M. (2016), 'China's economic growth in 2015 is slowest in 25 years', *The Wall Street Journal*, 19-01-2016 (online), available at: [www.wsj.com/articles](http://www.wsj.com/articles) (11-12-2016).

3 Taplin, N. et al. (2016), 'China's yuan joins elite club of IMF reserve currencies', Reuters (online), available at: [www.reuters.com](http://www.reuters.com) (11-12-2016).

the IMF's special drawing rights (SDR) basket, which determines currencies that countries can receive as part of IMF loans. It marks the first time a new currency has been added since the euro was launched in 1999.

## 7.1 Way of the Dragon

### Belt and Road Initiative and the Asian Infrastructure Investment Bank

China has boosted the confidence of economies with its Silk Road Economic Belt and 21st Century Maritime Silk Road (or the "Belt and Road Initiative") and the Asian Infrastructure Investment Bank. The Belt and Road Initiative set out by President Xi Jinping in 2013 is one of the government's key strategies which will provide a new growth engine for the economy. Through the Initiative, the government hopes to foster trade between the land-locked central and west of China with central Asia and Europe through building new infrastructure and developing economic ties. The New Silk Road Economic Belt as the overland portion is called will also lead to a much bigger business relationship between China and the European Union.

The Initiative also includes developing a Maritime Silk Road connecting China with Africa and Europe. A large part of the Silk Road Fund has been poured into tourism and related industries.

### Enhanced air service

China is expected to add at least 200 international air routes in 2016, especially those linking nations involved in the Initiative.<sup>4</sup> According to the Civil Aviation Administration of China, the country will invest about USD 11.7 billion in 2016 on the construction of civil aviation infrastructure including new airports in Beijing, Chengdu, Dalian, Qingdao and Xiamen.<sup>5</sup> Hoteliers are continuing to increase their presence in China with over 70% of the hotel construction pipeline in Asia and the Pacific attributed to China.<sup>6</sup> Island locations are anticipated to become more popular as will less-known places in leading destinations.

### Investment

China's Key Investment Fields in the nation's 13th Five Year Plan<sup>7</sup> (2016–2020) are:

- Internet Plus and 5G telecom technology;
- Infrastructure investment;
- Agricultural modernization;

4 Feiyue, Y. (2016b), 'Laying down the welcome mat', *China Daily Asia Weekly*, 29-01-2016 (online), available at: <http://epaper.chinadailyasia.com> (12-12-2016).

5 Lei, Z. (2016), 'China to sink billions into new airports this year', *China Daily*, 11-01-2016 (online), available at: [www.chinadaily.com.cn](http://www.chinadaily.com.cn) (12-12-2016).

6 TTG Asia (2016a), 'China becomes the world's biggest travel market', *TTG Asia*, 26-04-2016 (online), available at: [www.ttgasia.com](http://www.ttgasia.com) (11-12-2016).

7 Jing, M. and Zhuoqiong, W. (2016), 'Melding clicks and bricks', *China Daily Asia Weekly*, 11-03-2016 (online), available at: <http://epaper.chinadailyasia.com> (12-12-2016).

- Clean energy vehicles;
- Environmental protection and ecofriendly goods;
- Reform of state-owned enterprises;
- Belt and Road Initiative;
- Healthcare and retirement;
- Building world class city clusters in the Beijing–Tianjin–Hebei region; and
- Intelligent manufacturing.

### Advanced research

The American Institute of Aeronautics and Astronautics (AIAA) has presented the Ground Testing Award 2016 to Jiang Zonglin, a scientist from the Chinese Academy of Sciences, who led China's research and development in the area of shockwave hypersonic wind tunnel. Jiang was the first Asian scholar to get the Ground Testing Award, demonstrating China's advances in this field. Jiang's "Hyper Dragon" wind tunnel overcame scientific hurdles that have thwarted global scientists and engineers for about six decades. As wind tunnels are the basic research that decides how advanced aircraft may be developed, Jiang's achievement is a new scientific breakthrough in China's aeronautics and astronautics industry.

### High profile events

China has hosted the 2008 Olympic Games in Beijing, the 2010 World Expo in Shanghai, the 2014 APEC Economic Leaders' Meeting in Beijing and the recent G20 Summit in Hangzhou. Such international high-profile events were underpinned by the creation of an infrastructure of facilities and services that spurred leeway for further development of the industry. Beijing, with co-host city Zhangjiakou in surrounding Hebei Province won the rights to host the 2022 Winter Olympic and Paralympic Games over Almaty, Kazakhstan. This makes Beijing the only city in the world to stage both the Summer and Winter Olympics. While marquee events traditionally gravitate to first tier or "world cities" that have the infrastructure and image to draw global attention, second and third tier cities – example as in the case of Zhangjiakou of the 2022 Winter Olympics fame – are increasingly getting the attention of event organizers.

### Continued infrastructure development

Others are ambitious and hopeful such as the dynamic second-tier city Xiamen which intends to capture a larger share of China's meetings market in years to come as it is building a new airport, a rapid transit system, and more international hotels and is opening more air routes. Other Chinese cities are building convention centres, hotels and other venues to keep up with growing domestic and international demand for meetings in China. Both international and domestic Chinese corporations and associations continue to hold events all around China, with new destinations in second and third tier cities becoming more popular. Many of these cities have been boosted by government stimulus packages and will need to acquire sophisticated, full-service, business-oriented urban environments that deliver engaging visitor experiences while facilitating high-level business interactions if they want to target the international market.

China's infrastructure projects are expected to attract even more meetings opportunities for the country. The growth of China's meetings industry is a firm driver of regional growth benefiting other cities which are competing on unique selling points such as location, environment and history.

### Visa regulations

Beginning 30 January 2016, passport holders of 51 countries do not need a visa for transiting through the airports and open ports in Shanghai and the airports in Nanjing of Jiangsu Province (Nanjing Lukou airport) and Hangzhou of Zhejiang Province (Hangzhou Xiaoshan airport) for up to 144 hours. This expansion of the facility for China's prime business travel region was introduced with the aim to promote business travel and meetings, while the earlier 72-hour visa-free facility continues to be offered in most major arrival airports across China.<sup>8</sup>

## 7.2 China SWOT snapshot

Strength	Weakness
When China became a member of the World Trade Organization (WTO) in 2001, demand for engagement with China opened new doors. Attracted by convenient logistics and investment climate, more global companies have set up branch plants, bringing a growing opportunity for business events that relate to the nation's rapidly rising local services industry.	Many cities in China have the hardware to service the meetings industry, but lack the professional staff to run or market them, and especially so for the international events market.
Opportunity	Threat
The Belt and Road Initiative provides the chance to integrate the fragmented source markets for the meetings industry.	Issues pertaining travel facilitation (visas) could increase China's competitive advantage vis-à-vis other Asian neighbours.

## 7.3 Market segments and profiles

### 7.3.1 Corporate incentive

Staging events in heritage sites such as gala dinners on the Great Wall or cocktails in the company of the Terracotta Army are in demand in China. In addition, recently there have been many other unique venues which have been refurbished offering quality services resulting in unforgettable memories to the delight of the participants. Incentive participants who have 'seen it all' are still impressed with China's incentive elements that fuse tradition and the contemporary. The plethora of Fortune 500 companies has ensured increased demand, and the local industry suppliers are thinking creatively in China's key corporate incentive destinations. The entry of luxury hotel brands has presented a wide arrange of accommodation, meeting spaces and catering choices for participants.

<sup>8</sup> Ran, Y. (2016) 'Foreign tourists violating visa-free policy', *China Daily*, 10-08-2016 (online), available at: [www.chinadaily.com.cn](http://www.chinadaily.com.cn) (12-12-2016).

According to DMC Pacific World, China is attracting increased attention from international event planners after being named Asia's number one destination in its latest Destination Index Survey.<sup>9</sup> The August 2016 edition of its monthly survey is based on international event enquiries, actual meeting and event results and feedback from delegates. One example is the 8,000 strong group employees of the Chinese conglomerate, Tiens Group, who gathered in Bali in September 2016 for a mega incentive trip celebrating the company's 21st birthday. A series of meetings and leadership seminars took place at the Bali International Convention Centre before a peace-themed flag parade and a spectacular awards ceremony at the Garuda Wisnu Kencana Cultural Park.

Destinations around the world have been eyeing such outbound Chinese movements and are keen to get a piece of this business. This phenomenon will be further discussed in section 7.6 "The Chinese Wave."

### 7.3.2 Association congress

China's growing prowess in the medical, scientific and technology fields has greatly raised its potential for hosting association events on the international stage. However the lack of a professional intermediary in China – like a strong convention bureau which can act as an interface – poses a challenge to attract international meetings although up to now, China has achieved great success as a host destination. The differences in working culture present some challenges in addition to the absence of a CSR culture and corporate philanthropy when it comes to soliciting sponsorships from Chinese firms when bidding for international association events. Companies often deem scientific/technical association events as the government's responsibility and obligation to offer support therefore they are often reluctant to render financial assistance to such events. This report recommends for international associations who want to hold meetings work with the local PCO who is familiar with China's requirements and conditions and can negotiate with and appoint professional suppliers. China's government processes for conference management and funding support require many processes and different approaches to various separate government departments and ministries. Without a local partner who acts as representative and navigator, this can cause anxiety for international organizers who are not familiar with local requirements. As such, local relationships with the government to hasten the bureaucracy process are important and useful.

### Foreign associations in China

Dramatic change has happened in China relative to the association world. China has relaxed its policy on associations and NGOs operating in the country. China adopted its first-ever law on overseas NGOs which will take effect on 1 January 2017.<sup>10</sup> The new requirement means all overseas NGOs operating in China are to be registered and regulated by central or provincial-level authorities and sponsored by a Chinese partner organization before they can conduct any operations in China.

9 Common Event Infrastructure (CEI) (2016), 'China tops Pacific World Destination Index', *CEI*, 30-09-2016 (online), available at: [www.cei.asia](http://www.cei.asia) (12-12-2016).

10 Yin, C. (2016), 'New law adopted on overseas NGOs', *China Daily*, 29-04-2016 (online), available at: [www.chinadaily.com.cn](http://www.chinadaily.com.cn) (12-12-2016).



Chinese media estimate that there are more than 6,000 overseas NGOs in China and most are engaged in environmental protection, education and poverty relief efforts.

China already has around 159 future booked association meetings beginning 1 January 2017 and as far forward as 2023, as recorded by ICCA data.<sup>11</sup> Although mainly confined to Beijing and Shanghai, other Chinese cities – Hangzhou, Xi'an, Guangzhou, Xiamen, Shenzhen, Suzhou, Changsha, Dalian, Wuhan, Nanjing, Chongqing, Wuxi, Weihai or Jinan – have been booked to host international association congresses in various disciplines.

### Chinese associations

Chinese trade associations are expected to generate more events in the future as a result of greater autonomy granted to them by the government. In 2015, a trial programme was announced granting autonomy to 148 select associations covering a wide range of industries, from publishing and mining to automobile and animal protection.<sup>12</sup> The China Tourism Association was the first. Chinese industry observers believe that the conditions are in place to encourage Chinese associations to meet outside the country in search of new investment opportunities, case in point is the World Federation of Chinese Catering Industry which will organize a forum and cooking competition in Barcelona in September.

Traditionally the majority of meetings from China have been incentive meetings, however this 'sea change' can mean a significant growth in China's association meetings and generating evolutionary change in the global meetings industry.

### 7.3.3 Case study: Chinese community reunions and business networks

Chinese clan associations or societies usually start when some enterprising members of the community seek to forge unity and work together for the benefit of clan members because of shared dialect and origin. Many have migrated overseas in search of a new life where they have persevered to find a niche in the local business and social milieu but still maintain links with their ancestral home.

One such clan is the "Huang" Clan. In Chinese, *huang* means "yellow". The Huangs from all over the world not only have contributed to local social and economic progress but also returned to their ancestral country to invest, donate to education, facilitate bilateral trade and cultural exchanges between China and their new homes. In 2012, Huang Association in Cambodia hosted more than 1,600 global members from various Huang Clan Associations. Chinese clan associations are essentially community associations. Globally, China has by far the greatest number of Huangs; also, there are many clan members in the Philippines; the Republic of Korea; Hong Kong, China; Taiwan Province of China; Singapore; Brunei, the United States of America and Canada. Since the early 1980s, starting from Taiwan Province of China, Huang Clan gatherings occur once a

11 International Congress and Convention Association – ICCA (n.d.), *Association Database*, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (05-08-2016).

12 Lui, P. (2016b), 'More events as Chinese associations gain independence', *TTG Asia*, 11-04-2016 (online), available at: [www.ttgasia.com](http://www.ttgasia.com) (12-12-2016).



year, rotating from country to country. The Huang Clan members attend such gatherings to find their roots, connect with other members, develop business connections, as well as for leisure purposes. In 2016, China will host the World Huang Clan Convention.

The participants at a Huang Convention in Kota Kinabalu, Malaysia, were a “who’s who” in the business community, illustrating the business value of such community networks:

- Kota Kinabalu Huang Clan Association Sabah President;
- World Huang Clan Association President;
- Sabah United Chinese Chambers of Commerce President;
- Federation of Chinese Associations Sabah President;
- Sabah Dong Zong President;
- Labuan Chinese Chamber of Commerce President;
- Kota Kinabalu Hokkien Association President;
- Kota Kinabalu Chinese Chamber of Commerce and Industry;
- Sabah Tourism Federation President;
- The United Association of Chinese Clans Sabah President; and
- Huang Association of Malaysia President.

Another illustration of the potential from clan conferences is the third annual meeting of the European Federation of Taiwanese Hakka Associations and the World Hakka Reunion which was held by the Austrian Hakka Association and received attendees from eleven countries including Taiwan Province of China, the United States of America, Brazil, Germany, Japan, Spain, France, Canada, South Africa and the United Kingdom. Earlier editions of the meetings took place in Madrid and Frankfurt.

### 7.3.4 Exhibition

China became the third largest exhibitions market in the world and is expected to surpass Germany as the second largest market after the United States of America as early as 2017.<sup>13</sup> China is now home to 108 international standard exhibition venues accounting for more than 70% of Asia’s total venue capacity, says UFI, the Global Association of the Exhibition Industry, with nine out of the top-10 largest exhibition centres in Asia located in China.<sup>14</sup> In 2015, the National Exhibition and Convention Center in Shanghai (NECC) became Asia’s largest venue with 403,000 m<sup>2</sup>. Although it leads in terms of space sold in Asia, it is still under-utilizing its capacity. There is an excess of venue capacity in nascent regional markets and the challenge will be for show organizers to develop a sustainable trade fair culture.

13 AMRinternational (2016), *Globex 2016 – The global exhibitions organising market: assessment and forecast to 2020* (online), available at: [www.amrinternational.com](http://www.amrinternational.com) (10-12-2016).

14 The Global Association of the Exhibition Industry (2015), *The Trade Fair Industry in Asia*, UFI [electronic], 11, p. 102, available at: [www.ufi.org](http://www.ufi.org) (10-12-2016).

Table 7.1 Top-3 largest exhibition centres in China, July 2015

Ranking	Exhibition centre	City	Total gross indoor size (m <sup>2</sup> )
1	National Exhibition and Convention Center	Shanghai	404,400
2	China Import and Export Fair Complex (Pazhou Complex)	Guangzhou	338,000
3	Kunming Dianchi International Convention & Exhibition Center	Kunming	310,000

Source: UFI report 2016: Trade Fair Industry in Asia.

### 7.3.5 Case study: the Health Industry Summit (tHIS)

Over 210,000 visitors from 150 countries attended the inaugural mega healthcare event in Shanghai's National Convention & Exhibition Centre in May 2015. The event combined China's top-3 medical equipment and pharmaceutical exhibitions – CMEF, PHARCHINA and API China – representing the entire value chain for the health industry, and filling 290,000 m<sup>2</sup> of exhibition space with over 6,800 exhibitors. A new top-level investment forum – Healthcare China – headed the comprehensive education programme of 107 conferences and seminars covering all the key fields and industry topics. Other major conferences included the China Integrated Medical Imaging Summit, Asian Nuclear Medicine Academic Forum and Sino-Europe Pharmaceutical Forum.

Reed Sinopharm, a joint venture between Reed Exhibitions and China's leading state-owned pharmaceutical group Sinopharm, used the combined strength of their international networks and industry connectivity to write a new chapter for China's healthcare industry as it transforms from localised industry developments to a maturing market with global reach. According to a state-issued strategic whitepaper in 2013, China expects the total market size of its health sector to triple to a massive USD 1.2 trillion by 2020.<sup>15</sup>

<sup>15</sup> Reed Exhibitions (2015), 'World's largest healthcare event opens to record breaking crowds in Shanghai', press release, 01-05-2015, Reed Exhibitions (online), available at: [www.reedexpo.com](http://www.reedexpo.com) (12-12-2016).

## 7.4 Tale of three cities

The table below summarises key opportunities and threats faced by China's top-3 convention cities according to ICCA rankings in its 2015 annual report.<sup>16</sup>

Table 7.2 China's top-3 cities: opportunity and threat

City	Opportunity	Threat
Beijing	Capital city of China, all central government departments, foreign embassies and world organizations' offices are headquartered in Beijing, as are most national associations and China's top SOEs (state owned enterprises).	Priority given for official governmental events makes planning and scheduling of the meetings industry occasionally uncertain.
Shanghai	China's biggest industrial and commercial metropolis, and growing influence in financial services sector will mean more meetings for Shanghai.	Neighbouring cities like Suzhou and Hangzhou are now more accessible for pre/post touring due to improvements in infrastructure.
Hangzhou	Strong local government commitment to develop its meetings industry through Meetings Hangzhou, MICE Alliance, Conference Ambassadors Programme and Hangzhou West Lake Expo Office.	Intensive competition from other Chinese cities to take over Hangzhou's position as top-3 meetings city in China. <sup>a</sup>

a) Source: International Congress and Convention Association – ICCA (2016b), *The International Association Meetings Market 2015* (online), available at: [www.iccaworld.org/news](http://www.iccaworld.org/news) (10-12-2016).

### 7.4.1 Beijing

As China's seat of power, Beijing remains at the top of the list of destinations for visiting association congresses, incentive groups and exhibitions. The city has seen an explosion of chic, modern venues to the delight of corporate incentive groups. Itineraries include old and new elements, juxtaposing the city's imperial history with style and sophistication. In Beijing, there are many investors, hedge funds and venture capital firms that have helped fuel the breakneck growth in online and technology-based businesses. The capital city is home to the Zhongguancun Science Park which is commonly referred to as China's Silicon Valley with nearly 20,000 technology companies.<sup>17</sup> Beijing has the largest number of elite universities and scientific research institutes in the country and the city is building itself into a national scientific and technological innovation centre. The city made it into the top-10 of the world's most global cities for the first time in 2014, ranking eighth place in the A.T. Kearney Global Cities Index.<sup>18</sup> This Index is designed to provide insights into the global reach, performance and level of development of the world's largest cities.<sup>19</sup> The new airport in Beijing's southern Daxing district will be one of the world's largest commercial

16 International Congress and Convention Association – ICCA (2016b), *The International Association Meetings Market 2015* (online), available at: [www.iccaworld.org/news](http://www.iccaworld.org/news) (10-12-2016).

17 Yuan, G. (2015), 'Cities at the cutting edge', *China Daily Asia Weekly*, 11-09-2015 (online), available at: [www.epaper.chinadailyasia.com](http://www.epaper.chinadailyasia.com) (12-12-2016).

18 Gott, J; Hales, M; Mendoza Peña, A. and Peterson, E.R. (2014), *Global Cities, Present and Future – 2014 Global Cities Index and Emerging Cities Outlook*, April 2014, A.T. Kearney (online), available at: [www.atkearney.com](http://www.atkearney.com) (12-12-2016).

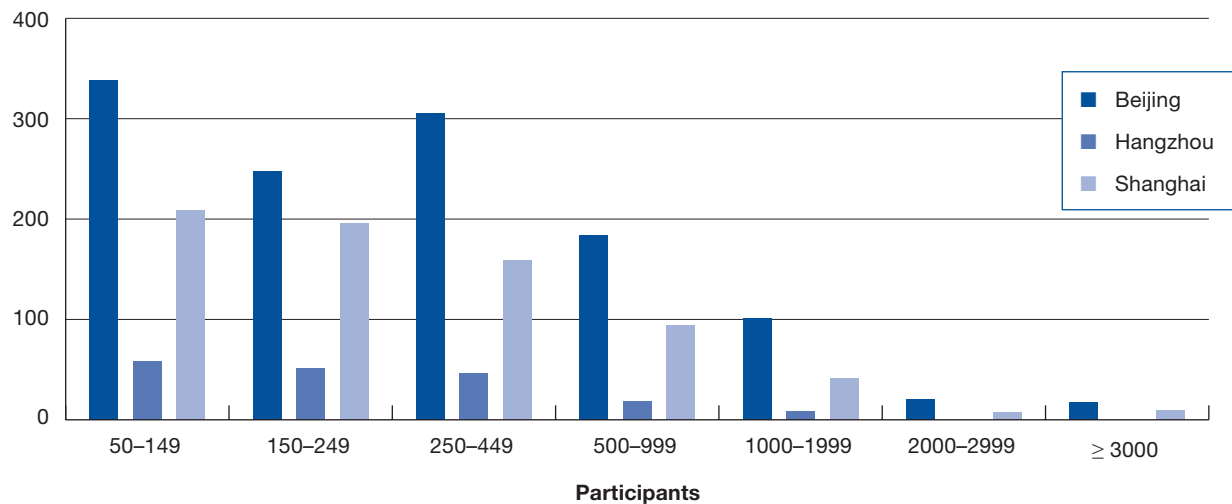
19 Hales, M. et al. (2016), *Global Cities 2016*, A.T. Kearney (online), available at: [www.atkearney.com](http://www.atkearney.com) (12-12-2016).

aviation hubs, with seven runways and the ability to handle 100 million passengers yearly in the long term. The first phase will be opened in 2019.<sup>20</sup>

In addition to economic benefits, international influence and opportunities to promote its image worldwide, hosting the Winter Games in 2022 is a shot in the arm for the integrated regional development of Beijing, Tianjin and the surrounding province of Hebei or *Jing-jin-ji* (Chinese abbreviation by which the three jurisdictions are known).

In China, Beijing has been leading in terms of size of meetings. Only meetings of which the participant numbers are stored in ICCA Data, including added averages, are included in these figures.<sup>21</sup>

Figure 7.1 Average size of association meetings in China's top-3 cities, 2006–2015



Note: Only meetings of which participant numbers are stored in the ICCA Association Database, including added averages, are included in these figures.  
Source: International Congress and Convention Association – ICCA) data, destination comparison report based on its association database 'ICCA Data', electronic (19-07-2016).

Last year's Coliseum Summit ASIA stadium conference, which was held in Beijing in November 2016, has gained additional significance in the backdrop of China emerging as one of the most promising stadium venues markets, not only in Asia, but in the world. Having hosted the Summer Olympics in 2008 and Asian Games in 2010 (Guangzhou), China has already bagged the rights to host not only the Winter Olympics (Beijing) but also the Asian Games (Hangzhou) both in 2022.

Upcoming association meetings:

- 12th International Gastric Cancer Congress, April 2017 (estimate 2,403 pax)
- IEEE International Symposium on Electromagnetic Compatibility, May 2018 (estimate 1,200 pax)
- 39th International Congress of Physiological Sciences, July 2021 (estimate 3,729 pax)

20 Centre for Aviation (CAPA) (n.d.), 'Profile on new airports: Beijing Daxing International Airport', *Centre for Aviation (CAPA)* (online), available at: [www.centreforaviation.com](http://www.centreforaviation.com) (12-12-2016).  
21 International Congress and Convention Association – ICCA (n.d.), *Association Database*, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (05-08-2016).

### 7.4.2 Shanghai

Home to many multinational and domestic headquarters, Shanghai is a fusion of tradition and modernity. Since hosting the 2010 World Expo, Shanghai's capacity for hosting large-scale exhibitions and events has greatly improved with state-of-the-art venues and rejuvenation of traditional venues. The trendy and glamorous Shanghai tends to attract high-end incentives and trendy lifestyle events like watch exhibitions and car launches aimed at the affluent domestic market. In 2014, Shanghai was rated Asia's most fashionable city, beating Tokyo and Hong Kong, China.<sup>22</sup> Shanghai is home to international organizations, diplomatic missions, think tanks, political conferences and local institutions with international reach. The city also hosts a majority of corporate meeting, rather than association congresses.<sup>23</sup>

China will make Shanghai a comprehensive science centre within three years through a series of innovation reforms which will see the city enjoying more flexible policies in research funding, and the sharing of scientific knowledge through the transfer of scientific research findings and collaboration between universities and the private sector who are anticipated to have fewer local government hurdles.<sup>24</sup> Shanghai has 100 conference ambassadors from 30 industries to help the city in its quest to become a global science and technology centre.

In 2015, 13 meetings management companies were listed on Shanghai's "Conference Organizers in Compliance with Management & Service Standards of the Meetings Industry".<sup>25</sup> These organizations have obtained the Shanghai Conference Service Standard Organization certificate issued by the MICE Service Standards Technical Committee of Shanghai Tourism Standards Technical Committee. This move comes in the wake of the official approval of the first set of regional standards in China's meetings service industry back in September 2012.

In 2013, Shanghai hosted ICCA's Annual Congress at the Shanghai International Convention Center and as part of the programme's content, offered delegates the opportunity to visit the Shanghai World Expo site to learn how the major event transformed the city. Most meetings in Shanghai are corporate meetings, although the city also has its fair share of association meetings. In 2016, the Shanghai Exhibition Industry Association (SCEIA) hosted the 83rd Congress of UFI – the Global Association of the Exhibition Industry – at the National Exhibition and Convention Centre.

The BRICS (Brazil, the Russian Federation, India, China and South Africa) New Development Bank, headquartered in Shanghai, will help the city realize its aspiration of becoming a global financial centre. This is the first time a major international institution is headquartered in Shanghai, signalling the city's financial services are of global standard and opening doors to more meetings taking place here. According to the Global Financial Centers Index, Shanghai ranked as the top

22 Wei, H. (2014), 'Shanghai becomes Asia's most stylish city', *China Daily USA*, 10-02-2014 (online), available at: [www.usa.chinadaily.com.cn](http://www.usa.chinadaily.com.cn) (12-12-2016).

23 Lui, P. (2014), 'Vying for recognition', *TTG Associations*, April 2014 issue, p. 36.

24 Yue, Z. (2016), 'Shanghai set for huge science role within three years' *China Daily USA*, 31-03-2016 (online), available at: [www.usa.chinadaily.com.cn](http://www.usa.chinadaily.com.cn) (12-12-2016).

25 Shanghai Municipal Tourism Administration (n.d.), 'Recommended PCOs and DMCs' (online), available at: [www.meet-in-shanghai.net](http://www.meet-in-shanghai.net) (12-12-2016).

pick among the world's cities expected to become significant global financial centres in the next few years.<sup>26</sup>

The city's dependency on the services sector, especially highly value-added services is an inevitable course for Shanghai.

**Upcoming association meetings:**

- 11th Congress Meeting of the International Arthroscopy, Knee Surgery and Orthopaedic Sports Medicine, June 2017 (estimate 4,000 pax)
- 19th International Conference on Liquefied Natural Gas, April 2019, (estimate 2,513 pax)
- 14th International Congress on Mathematical Education, July 2020 (estimate 2,000 pax)

### 7.4.3 Hangzhou

Hangzhou has historically been a popular tourism destination, being mentioned even by Marco Polo, and well regarded as a national cultural and leisure capital, however, the city's focus has been gradually and steadily diversifying. In 2009, the Hangzhou Tourism Commission set up a meetings unit, established its MICE Alliance with around 100 members from the private sector supplier bodies, sought support from its own Conference Ambassadors, completed a feasibility study and a Meetings Industry Roadmap. Today, as reflected in ICCA's rankings, Hangzhou is Mainland China's third most popular meetings destination for international associations after Beijing and Shanghai.

Located in eastern China only 50 minutes by high speed train from Shanghai, the city boasts of UNESCO World Heritage sites, and also a tech hub, home to Alibaba's global headquarters, as well as the West Lake Apple Store, arguably the largest Apple store in Asia. The city is today planning to establish itself as a global e-commerce platform by end of 2017 with more than 5,000 cross border e-commerce companies, more than 10 cross-border e-commerce industrial parks and more than 20 cross-border e-commerce incubation platforms in 2017.<sup>27</sup>

Hangzhou has hosted incentive groups from Malaysia, Singapore, Viet Nam, Taiwan Province of China and Hong Kong, China, including NuSkin and Takeda Pharmaceutical. The city hosted the G20 Summit in September 2016 where some 30 major agreements are likely to be reached at the Summit, reflecting the high expectations of the international community from China as the Summit host. At least 1,700 new five-star rooms came into the market to meet the demands of the event. In addition, the brand new Hangzhou International Expo Centre, the main venue of the Summit, opened their doors for business. The Centre has 61 meeting rooms and the city's largest conference hall at 10,000 m<sup>2</sup>. The Hangzhou Olympic Sports Expo Center, with a 80,000 seat capacity in a unique lotus bowl design, was completed in June this year, and will soon welcome the Chinese University Games and the Asian Games 2022, to name just a few. China has hosted the Asian Games twice before, at Beijing in 1990 and Guangzhou in 2010. A new landmark building complex of Zhejiang Province, the Hangzhou Olympic Sports Expo Center is one of the

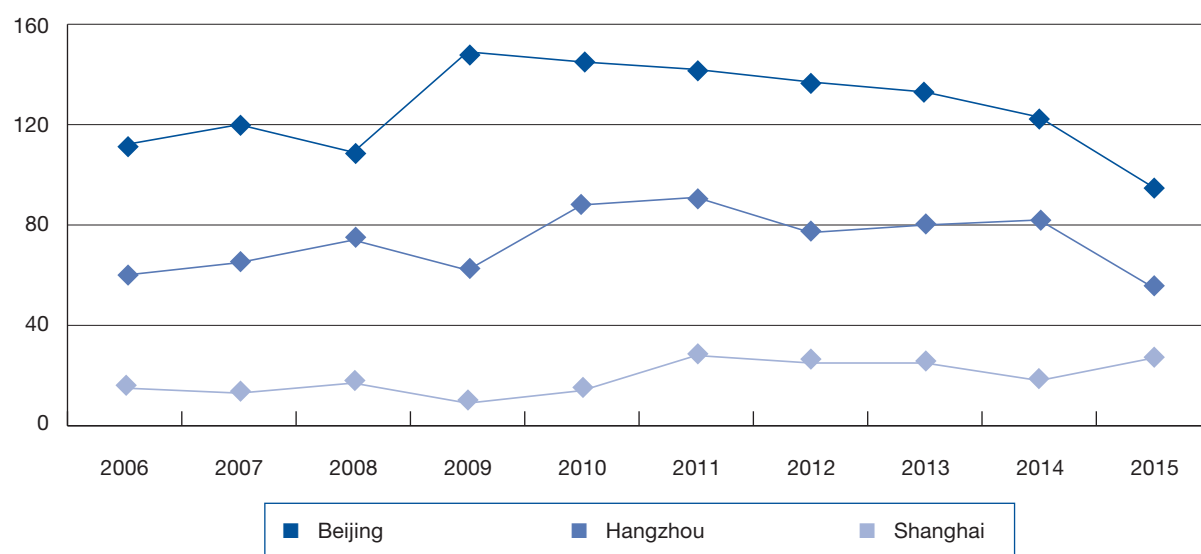
26 Mahrotri, P.T. (2016), 'Watch out Singapore, Hong Kong: Shanghai top pick to become next financial hub', *Bloomberg Markets*, 27-09-2016 (online), available at: [www.bloomberg.com](http://www.bloomberg.com) (12-12-2016).

27 China Daily Europe (2016a), 'East Chinese city constructs global cross-border e-commerce base', *China Daily Europe*, 26-01-2016 (online), available at: <http://europe.chinadaily.com.cn> (12-12-2016).

key infrastructure projects of Hangzhou's 12th Five-Year Plan. Hangzhou will host the 2018 FINA World Swimming Championships and the FINA World Aquatics Convention, beating Lima in Peru and the United Arab Emirates for the honour.

Although Hangzhou lags behind Beijing and Shanghai, it is the third most popular city for international association conventions in China.

Figure 7.2 Number of association meetings hosted in China's top-3 cities, 2006–2015



Source: International Congress and Convention Association – ICCA) data, destination comparison report based on its association database 'ICCA Data', electronic (19-07-2016).

#### Upcoming association meetings:

- 30th Annual Meeting of the Asia Pacific Association of Cataract and Refractive Surgeons, June 2017 (estimate 1,095 pax)
- 4th Conference of the Association of Critical Heritage Studies, September 2018 (estimate 661 pax)
- 50th AIPPI World Intellectual Property Congress 2020 (estimate 3,149 pax)

## 7.5 China inbound tourism

For a long time, inbound tourism was the largest part of the tourism sector in China. Then in the 1990s, the Chinese began to travel, not only internally but also internationally. While outbound travel from China still shows no sign of slowing down and Chinese expenditure on outbound travel surged 53% to USD 215 billion in 2015, inbound tourism into the country grew a mere 3%, according to the *Economic Impact Report 2016* by the World Travel & Tourism Council (WTTC). The WTTC research<sup>28</sup> shows enormous opportunity for China to take greater benefit of the travel

28 World Travel & Tourism Council (2016), 'Chinese outbound travel continues to soar but inbound potential remains untapped', press release, 21-03-2016, WTTC (online), available at: [www.wttc.org](http://www.wttc.org) (12-12-2016).

and tourism industry, which supports over 75 million jobs in the country and can help the Chinese government to fulfil its objective of shifting towards a more service-focused economy. China's unparalleled investments in infrastructure over recent years have created a good foundation for the further expansion of tourism by increasing connectivity and the country's tourism capacity. China's inbound tourism saw three years of declining overseas visits starting in 2012 however, the downward trend has been contained and a positive growth in visitors and expenditure is forecast by the end of 2015 according to the China Tourism Academy (CTA).

China's inbound tourism industry saw three years of declining overseas visits starting in 2012 because of air pollution, visa difficulties, currency exchange rates and the overall global economy situation. However, the China Tourism Academy (CTA) states that the downward trend has been contained and China will see positive growth in inbound tourist visits and expenditures by the end of 2015.<sup>29</sup>

## 7.6 China outbound tourism

The tremendous increase in the number of Chinese travelling overseas has been one of the biggest stories in recent years. The *UNWTO World Tourism Barometer* indicates that in 2015, China, with double-digit growth in expenditure since 2004, continues to lead global outbound travel, benefiting Asian destinations such as Japan and Thailand, as well as the United States of America and various European destinations.<sup>30</sup> Popular destinations for Chinese tourists are mainly in Asia, including Thailand, Japan, and Singapore, while the United States of America and France also made the list of favourite countries for Chinese travellers. Japan was one of the biggest beneficiaries from China's outbound travel boom last year due to the devaluation of Japanese currency and a relaxed visa policy for Chinese tourists. Spending by Chinese tourists in Japan grew by almost half compared with 2014.

Arrivals from China to Asia and the Pacific destinations will climb from an estimated 102 million in 2015 to more than 150 million by 2020 and generating close to 23% of all arrivals by the close of this decade, says the Pacific Asia Travel Association (PATA).<sup>31</sup> In the first quarter of 2016, outbound traffic increased 2.4% over the same period in 2015, the lowest growth rate reported since the beginning of outbound tourism from China in 1997. According to the China Outbound Tourism Research Institute, the growth rate is dampened by the 11% decrease in Chinese visitation to China's Special Administrative Regions (SARs). However, travel to other parts of the world, especially into Europe and North America grew by 22%.<sup>32</sup>

29 Zhou, S. (2016) 'Inbound tourists, once marginal, now golden', *China Daily*, 20-05-2016 (online), available at: [www.chinadaily.com.cn](http://www.chinadaily.com.cn) (12-12-2016).

30 World Tourism Organization (2016a), 'International tourist arrivals up 4% reach a record 1.2 billion in 2015', press release, 18-02-2016, UNWTO (online), available at: [www.media.unwto.org](http://www.media.unwto.org) (12-12-2016).

31 Koumelis, T. (2016), 'China outbound wave dominates tourist arrivals across Asia Pacific to 2020', *Travel Daily News*, 12-05-2016 (online), available at: [www.traveldailynews.asia](http://www.traveldailynews.asia) (12-12-2016).

32 TTG Asia (2016b), 'China outbound show slowest growth since 1997', *TTG Asia*, 31-05-2016 (online), available at: <http://ttgasia.com> (12-12-2016).



Table 7.3 Top-10 overseas destinations, 2015

Rank	Country	Rank	Country
1	Japan	6	Australia
2	Thailand	7	Russian Federation
3	Republic of Korea	8	Indonesia
4	United States of America	9	New Zealand
5	Singapore	10	United Kingdom

Source: Ctrip.

WTTC revealed that Chinese tourists spent USD 215 billion abroad in 2015. The number of Chinese tourists traveling internationally has more than doubled to 120 million people over the last five years, according to data from the China National Tourist Office and WTTC. That means one in every ten international travellers now comes from China. Over the past few years, Chinese tourists have emerged as the highest-spending visitors in the world.

### 7.6.1 Chinese business travel

Travel for meetings comprises 42% of total domestic business travel volume in China and 45% of total spending. In 2014, an estimated 138.5 million domestic trips were taken for meetings purposes in China and each individual travelling for a business event spent an average of USD 1,100. Beijing and Shanghai make up a significant amount of room supply and meeting space in the country with a combined total of 1,248 hotel properties and over 215,000 rooms.<sup>33</sup>

In 2017, total Chinese business travel is expected to be USD 344.6 billion, compared to travel business spending from the United States of America at USD 293.1 billion, a difference of USD 51.5 billion. This makes China the largest business travel market in the world.<sup>34</sup>

According to GBTA's forecast, in 2016 China will grow 11% in the domestic and international business travel expenses, to USD 322 billion, surpassing USD 303 billion of the spending from the United States of America. By 2019, China's business travel spending will grow 61% to USD 422 billion. Outbound corporate and incentive business travel stands at almost 40% of total domestic and international business travel expenses and mainly comes from Beijing, Shanghai and Guangdong region. There is however increasing business opportunities coming from second tier destinations such as Hangzhou, Chongqing, Chengdu and Shenzhen.

The *2nd MICE Buyers' Report* of 2014 reported that Chinese meeting organizers consider price and a match to business interests as their key considerations.<sup>35</sup> Nearly half of those

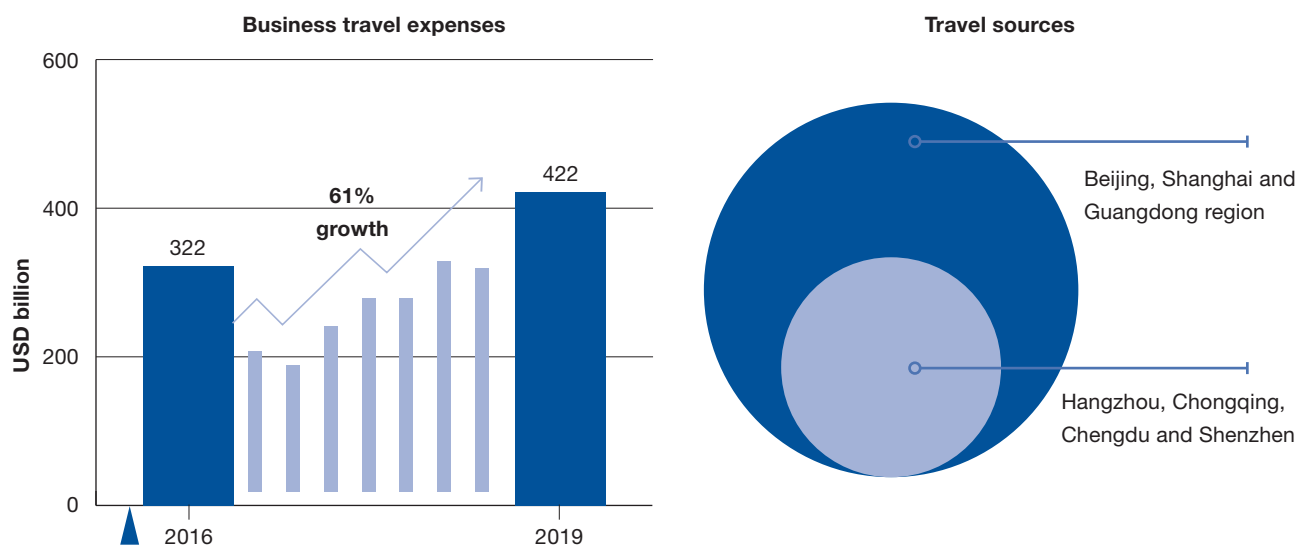
33 Common Event Infrastructure (CEI) (2015), 'GBTA Foundation releases first study of China's MICE market', *CEI*, 11-11-2015 (online), available at: [www.cei.asia](http://www.cei.asia) (12-12-2016).

34 Hotel News Resource (2016), 'China accounts for nearly 25% of global business travel spending', *Hotel News Resource*, 31-10-2016 (online), available at: [www.hotelnewsresource.com](http://www.hotelnewsresource.com) (12-12-2016).

35 Incentives, Business Travel and Meetings Expo China (2014), 'Price and a match to business interests emerge as key factors', press release, 06-10-2014, IBTM China (online), available at: [www.cibtm.com](http://www.cibtm.com) (12-12-2016).

surveyed said that they go worldwide for their meetings (47%), while 44% said that a destination's tourism appeal was very important. According to IBTM China, a meetings trade show held in Beijing, China has witnessed a rapid expansion of the outbound meetings market with spending in European countries expected to reach value close to USD 800 million by 2020. 68% of buyers attending the show had expressed interest in placing events in Europe.<sup>36</sup>

Figure 7.3 China business travel, 2016–2019



Note: According to the Global Business Travel Association – GBTA- Foundation forecast, in 2016, China will grow 11% in the domestic and international business travel expenses, to USD 322 billion, surpassing USD 303 billion of United States spending. By 2019, China's business travel spending will grow 61%, to USD 422 billion. Outbound corporate and incentive business travel stands at almost 40% of total domestic and international business travel expenses and mainly comes from Beijing, Shanghai and Guangdong region. There is however increasing business opportunities coming from second tier destinations such as Hangzhou, Chongqing, Chengdu and Shenzhen.

Source: GainingEdge based on GBTA Foundation Forecast.

## 7.6.2 Chinese incentive travel

China's phenomenal growth in this sector has compelled many destination marketing organizations (DMOs) to have a focused strategy for the China outbound meetings segment. In a bid to attract the Chinese business traveller, foreign tourism boards and convention bureaus have launched numerous marketing programmes and schemes to raise awareness and incentivise the Chinese meetings market. The primary focus is the corporate meetings and incentive market; however some destinations are targeting China for trade show buyers and sellers, as well as conducting delegate boosting activities for regional (Asia and the Pacific) international conventions being hosted in their respective countries.

36 Global Ready China News (2016), 'Outbound Chinese MICE market set to reach USD 800 million by 2020', Global Ready China News, 03-02-2016 (online), available at: [www.china.globalready.news](http://www.china.globalready.news) (12-12-2016).

Table 7.4 Chinese incentive market

Groups	Revenue
<ul style="list-style-type: none"> <li>– Direct selling, insurance, pharmaceutical and IT are the key industries for incentive groups from China;</li> <li>– Incentive specialists in China are observing a sturdy demand for outbound incentive travel. However, programme objectives, destination selections and group sizes have changed;</li> <li>– Organizers of incentive programmes for Chinese companies are increasingly looking to incorporate meaningful CSR activities, as well as unique accommodation options.<sup>a</sup> Groups not only want to give back but also feel a stronger sense of connection to the community that they are visiting. While the five-star experience is important, participating in social responsibility initiatives while they are there is a growing trend;</li> <li>– The meetings component within an incentive programme is also growing. Clients have maintained their incentive travel budgets in 2016 but shifting away from locations perceived to have terror threats; and</li> <li>– The United States of America, Australia and South Asia such as Sri Lanka are popular.</li> </ul>	<ul style="list-style-type: none"> <li>– Chinese firms are increasingly adding revenue-generating objectives to their incentive travel programmes and would seek out trade opportunities in the destination. A Chinese healthcare firm that went to South Africa also took the chance to explore opportunities to supply their products to local hospitals; and</li> <li>– Although Hong Kong, China, was the choice destination for a number of sizeable meetings and incentive groups from China's insurance, direct selling and electronic companies in 2015, overnight arrivals remained the same as in 2014. This has been attributed to the tightening of Chinese government spending on travel and events. Pharmaceutical and insurance companies in China are now favouring domestic destinations such as Xiamen, Sanya and Zhuhai. The contraction of arrivals have led to reduced pressure on room rates, making Hong Kong, China, less pricey. Through an award programme, Hong Kong Tourism Board will motivate travel agents to promote Hong Kong, China, as the ideal destination for Mainland Chinese corporate clients. In June 2016, Hong Kong, China, played host to the Nu Skin Greater China Regional Convention 2016 which was held at AsiaWorld-Expo.</li> </ul>

a) Lui, P. (2016a), 'CSR activities, unique stays top Chinese incentive requirements', *TTG Asia*, 07-04-2016 (online), available at: [www.ttgasia.com](http://www.ttgasia.com) (12-12-2016).

In recognition of the important role China plays as a partner supporting Australia's tourism industry, the Australian Government is increasing flexibility and ease of travel for Chinese business visitors through its visa system. China is the first country that the Australian Government has allowed three-year multiple entry visa for business visitors. Tourism Australia's China Market Profile 2016 reported that in 2015, China was Australia's second largest inbound market for visitor arrivals and the largest market for total spend and visitor nights; 9% of its 1,024,000 visitors were there for business purposes.<sup>37</sup> Due to significant growth in second tier Chinese cities, Australia is expanding its promotional efforts to Nanjing, Tianjin, Chengdu and Qingdao where its targeted industry customers are based – direct selling, finance/insurance, healthcare and IT. One of China's largest personal healthcare companies, Infinitus, will send 8,000 top performers to the Gold Coast in May 2018 for a week-long incentive programme, making this the largest ever business event hosted on the Gold Coast.

The Chinese market is a huge new market for Finland where glass roof igloos and the Northern Lights are examples of exclusive offerings. Finland has vast potential for the Chinese incentive market as it is still a novelty for many Chinese consumers. The Helsinki Convention Bureau participated in the first Finland MICE Industry roadshow held in Beijing and Shanghai in March 2016 to promote Finland as a unique host country for corporate events and congresses. Chinese buyers attending the event were particularly interested in direct flights between China and Finland,

<sup>37</sup> Tourism Australia (2016), *China Market Profile 2016*, Tourism Australia (online), available at: [www.tourism.australia.com](http://www.tourism.australia.com) (12-12-2016).

services of local destination management companies, the availability of Chinese-speaking guides, and the proximity of St. Petersburg.

Amway China will be sending 10,000 of its elite sales people to Queenstown, New Zealand in 2018 for five days. The group will visit in multiple waves of 500. Amway China, headquartered in Guangzhou with two regional offices in Beijing and Shanghai has become the largest affiliate within Amway's worldwide business.

The Singapore Exhibition and Convention Bureau (SECB) launched the its Singapore Incentives and Rewards (INSPIRE) 2.0 programme for the Greater China market in September 2015. INSPIRE Greater China 2.0 aims to promote Singapore's unique attractions by packaging curated itineraries that cater specifically for this market.

In the meantime, Thailand unveiled a specially designed 'Thailand CONNECT Welcome Package 2016' for business events travellers from China, Thailand's primary source market. As a result of the upward trend of the Corporate Incentive market from China over the past 3 years, the Thailand Convention and Exhibition Bureau (TCEB) has appointed sales and marketing representatives to directly target corporate customers in Beijing, Shanghai, Guangzhou and emerging provinces including Shenzhen and Chengdu. Recently, TCEB presented the "Thai-Sino MICE Outstanding Contribution Award" to Infinitus (China) for their continuous support of Thailand. The Infinitus Overseas Training 2016 was held in Thailand for the thirteenth time.











Thailand has attracted a host of important events from China, including Bravolinks Integrated Marketing Co. Ltd (March 2016), Beijing Piptide Biological Technology Co. Ltd. (May 2016), Jimei Pharmaceutic (April 2016), Renyuan Group (April 2016), NCK Cosmetics (July 2016), Sunwins International (May 2016), and TERRA China (May 2016). TCEB also signed a Memorandum of Understanding with the China Chamber of International Commerce (CCOIC) aimed at attracting more meetings travellers from China. Under the terms of the MOU, TCEB and CCOIC have agreed to establish a long-term partnership in several areas and across several meetings platforms. This includes a plan to further improve and regularly exchange information on trade promotion and a commitment to providing support and encouraging academic research, business trade missions and participation in trade events in both countries.<sup>38</sup>

The Philippine Department of Tourism (DoT) is hoping to grow Chinese incentive arrivals by encouraging the creation of more charter flights from China. Hundreds of Chinese incentive groups visited Philippines last year, thanks to the availability of direct charter flights in the form of regular services that are operated for a year, as well as short-term and ad hoc ones during China's Golden Week holidays. The uptrend is expected to continue this year, on the back of further plans for charter flights which will see more Chinese cities beyond Shanghai, Beijing and Guangdong are linked to Boracay and Cebu which are favoured by leisure and incentive travellers.

The United States of America are offering a ten-year multi-entry visa policy for Chinese travellers, and 2016 was designated as the United States of America/China Tourism Year.

38 Feiyue, Y. (2016a), 'China-Thai agreement targets MICE business', *China Daily USA*, 30-05-2016 (online), available at: <http://usa.chinadaily.com.cn> (12-12-2016).

Figure 7.4 Examples of Chinese incentive groups

	<p><b>Tien Group (healthcare products)</b></p> <p>4-day excursion, May 2015, France</p> <p> 6,000 consultants</p>	<p><b>USD 20 million</b> economic impact</p> <p> 4,700 rooms in 79 hotels</p>
	<p><b>Infinitus (Chinese herbal product)</b></p> <p>6-day excursion, May 2015, Thailand</p> <p> 12,700 consultants</p>	<p><b>USD 18 million</b> economic impact</p> <p>Groups of 2,000 to 3,000 were sent to visit Bangkok and beach town of Pattaya</p>
	<p><b>Nu Skin (Personal care products and dietary supplements)</b></p> <p>10-day excursion, April 2016, Dubai</p> <p> 14,500 participants</p> <p> 200 flights booked, including two chartered Emirates planes</p> <p>Visitors arrived in overlapping groups of around 2,000 people a time</p>	<p><b>USD 80 million</b> economic impact</p> <p> 39,000 beds in 40 hotels</p> <p> 409 buses were required</p> <p><b>Largest</b> single incentive group ever hosted in Dubai</p>

Notes: In May 2015, the Tiens Group, which offers healthcare products, booked more than 4,700 rooms in 79 hotels in France to take 6,000 consultants on a four-day excursion to celebrate the company's 20th anniversary. The trip generated USD 20 million in revenue.

Infinitus, a direct seller of modern Chinese herbal products, sent 12,700 consultants, sellers and customers on six-day trips to Thailand. The company sent people in groups of 2,000 to 3,000 to visit Bangkok and the beach town of Pattaya. Thailand's tourism officials reported an economic impact of USD 18 million.

Dubai Department of Tourism and Commerce Marketing (DTCM) says that the 14,500 pax "Nu Skin Success Trip" generated an econ impact USD 80 million. 10 days in April 2014. The sales and marketing group arrived in seven staggered waves. By the time they left, 40,000 hotel room nights had been booked, 300,000 bottles of water drunk and 13 dhows had provided no fewer than 94 dinner cruises.

Dubai collaborated with its neighbouring emirates to make the trip a successful and memorable one for all involved. The extensive and complicated logistics for the event included 77 flights, 40,000 room nights in 40 hotels, and more than 370 coaches escorting guests on a full city tour of Dubai, a Dhow Cruise, and a visit to the Dubai Mall, Burj Khalifa and Palm Jumeirah.

In addition, the group enjoyed full-fledged gala dinners in groups of 7,500 at the Bab Al Shams Desert Arena, and held educational seminars at the Dubai World Trade Centre (DWTC), the Middle East's largest event and exhibition centre.

Source: GainingEdge website, News and Resources 'GainingInsights into China' (online), available at: <http://gainingedge.com/gaininginsights-into-china> (12-12-2016).



---

## Chapter 8

### Republic of Korea

#### Summary

The Republic of Korea is discussed in this final chapter on destinations which have impacted the meetings industry in Asia. The Republic of Korea was selected for its meteoric rise to the leader board, not only in Asian terms but also globally. The Republic's strong government and private sector approach to the meetings industry is complemented by highly advanced infrastructure and meetings infrastructure. In addition to this powerful cocktail is a dynamic association community who is always ready to serve on the committees and boards of international organizations. The chapter ends by studying three international conventions which brought the world to the Republic's doorstep and left lasting legacies for the nation, and the world.

#### Key words

- High value innovation;
- Convention Promotion Law; and
- Knowledge economy.

#### Key messages

- The Republic of Korea has been ranked as the world's most innovative economy by Bloomberg;
- It is an increasingly popular destination for incentive travel particularly among companies in Asia and the Pacific;
- The Republic of Korea will welcome 155 international association congresses between 2017 and 2025, across a wide range of disciplines and taking place in different cities around the peninsula;
- The Republic of Korea has a highly efficient IT infrastructure which is the signature of all its twelve cutting-edge convention centres; and
- The Korea MICE Bureau (KMB) works closely with the eleven regional convention bureaus to ensure a yearlong calendar of meetings for the Republic of Korea.

The manufacturing sector was considered more important than tourism until the Republic of Korea hosted the 1986 Asian Games, and followed by the Summer Olympics in Seoul in 1988. Hosting the Olympics led to development of tourist infrastructure, expansion of international air service and media coverage that showcased the nation to the world. A key priority for the country was to diversify its economy through high-value innovation and to create new growth industries for the future, particularly in the services sector.

Since then, the Republic of Korea has continued to invest in order to increase its global competitiveness in the tourism and meetings industries and bidding for high-profile events. Between 2009 and 2014, the number of foreign visitors nearly doubled from 7.8 million to 14.2 million. In 2015, the travel and tourism sector made up 5.1% of national GDP and directly generated 561,000 jobs, or 2.2% of total employment.<sup>1</sup>

The Republic of Korea successfully won, organized and hosted international marquee events which proved the nation's capability to host global events. Its new growth strategy is aimed at

---

<sup>1</sup> Park, H.K. (2016), 'Korea as a global tourism destination', *The Korea Times*, 19-04-2016 (online), available at: [www.koreatimes.co.kr](http://www.koreatimes.co.kr) (13-12-2016).

fostering a creative economy.<sup>2</sup> International meetings and conventions aim to help the country not only improve the business environment but also to enhance the exchange of global knowledge and innovation.

An Asian hub with direct accessibility from over 170 cities and with one-third of the world's population within a three-hour flight, the Republic of Korea sits in a strategic location. The nation's high-speed train KTX traverses the country from airport, via Seoul to south-west and south-east coasts, facilitating regional conferences in major industry hubs, and incentive options that have been fully impressed corporate participants. Other cities have also put in place improved infrastructure to increase accessibility, enabling conference participants to indulge in the country's culture, history, cuisine and sights which include twelve UNESCO World Heritage Sites.

Figure 8.1 The Republic of Korea in the global spotlight



Source: GainingEdge.

In 1996, the Government enacted the Convention Promotion Law to designate and develop convention cities and facilitate the development of convention centres. Classified as Social Overhead Capital Facilities, convention facilities were eligible for financial support in the form of

<sup>2</sup> Organisation of Economic Co-operation and Development (2014b), *OECD Economic Surveys Korea* (online), available at: [www.oecd.org](http://www.oecd.org) (13-12-2016).



tax exemptions, other payment deduction and building site acquisitions.<sup>3</sup> This support has resulted in the number of convention centres jumping from four to twelve in the past decade. According to the Korea MICE Bureau, the nation's key agency in promoting and selling the Republic of Korea as the preferred meetings destination, the government invested a hefty USD 20 million for the enhancement of meetings infrastructure in 2013. The sum, up nearly by one third compared to the previous year, demonstrates the ambition of the Government of the Republic of Korea to nurture meetings as a key strategic industry and one which will power the nation's knowledge economy.

The Convention Promotion Law also enforces the standards for registration and the responsibilities of the professional congress organizers (PCOs) to maintain high quality service. Monthly wages are expected to be greater than the average wage in related industries. The CMP credential is recognized globally as the badge of excellence in the meeting, convention, exhibition and event industry, and thus speaks well for the level of professionalism available.

In 2013, the Ministry of Culture, Sports and Tourism introduced policy reforms to achieve its target of attracting 16 million international visitors annually, and creating 60,000 new jobs by 2017. These included:<sup>4</sup>

- Increased visa facilitation;
- Replacement holiday plan to encourage more domestic travel;
- Hotel tax refund programme (foreign visitors will be reimbursed for the VAT charged to room stays);
- Additional financial and administrative resources for the meetings industry;
- Medical tourism promotion together with Ministry of Health and Welfare including the establishment of medical tourism clusters in Daegu and Osong;
- More berths committed to cruise ships at the major seaports and on-board casino services; and
- Tourism Liaison Officer Programme within National Police Agency to areas frequented by tourists to oversee security.

According to the Korea Tourism Organization (KTO), an estimated 40,000 people are expected to visit the republic for business events-related purposes in 2016, reflecting an increase of 47% over the previous year. In the first half of the year, thanks in part to several +1,000 attendee events held across the nation, the Republic of Korea welcomed over 275,655 incentive travel visitors representing a 49.5% increase from its first half-annual totals from last year. In cooperation with regional convention bureaus and the private sector, in the first half of 2016, KTO recorded 84 large-scale conferences and 3,806 incentive events totalling over 221,000 future business travellers to the country.<sup>5</sup>

In 2015, the government had planned to further boost meetings by integrating the sector with other services, especially medical tourism activities including health check-ups, cosmetic procedures, acupuncture therapy and skincare programmes.

3 Chon, K.S. and Weber, K. (2014), *Convention Tourism: International Research and Industry Perspectives*, Haworth Press, New York, p. 176.

4 Organisation for Economic Co-operation and Development (2014a), 'Korea', *OECD Tourism Trends and Policies 2014*, OECD, pp. 228–234.

5 Korea Tourism Organization (2016), 'Korea inbound tourism projected to grow by 20% in 2016', *Union of International Associations*, 04-08-2016 (online), available at: [www.uia.org](http://www.uia.org) (13-12-2016).

## 8.1 Republic of Korea SWOT snapshot

Strength	Weakness
Strong government and private sector approach to the meetings industry which is complemented by highly advanced infrastructure and facilities.	Heavy demand for meetings within the Republic of Korea resulting in internal competition.
Opportunity	Threat
Increasing numbers and strength of national associations with links to major international organizations.	Competition from Japan and from emerging Asian cities that are seen as a cheaper alternative.

## 8.2 Market segment and profiles

### 8.2.1 Corporate incentive

The creativity behind its rich cultural heritage, the popularity of Korean pop culture all over the world plus its high tech wizardry is helping the Republic of Korea deliver the unique experiences that make corporate incentive trips truly unforgettable.

Currently experiencing a boom period for inbound incentive travel, the Republic of Korea has welcomed several large corporations including China Aurance, Joy Main and Longrich and Japan Zengokyo, the All Japan Mutual Aid Association. The government is mainly focusing on Chinese and Japanese markets and seeks to diversity its market to Southeast Asia. In 2016, Chinese and Japanese market took the lion's share of 49.2% of the incentive sector.<sup>6</sup>

In recent years the Republic of Korea has increasingly become a popular destination for incentive travel, particularly among companies from Asia and the Pacific. The Herbalife Asia Pacific Extravaganza 2016 was held in Ilsan KINTEX and Goyang OneMount in Gyeonggi Province in June, attracting 6,728 pax and providing KRW 23 billion (approximately USD 19 million) in economic benefits to the country. Other incentive events in 2016 are China Leroy and Weina Cosmetics, Thailand Bangkok Insurance, and Japan Shaddy. More than 10,000 employees of Zengokyo will visit Busan and Seoul in waves from September 2016 to March 2017.

In 2016, KTO conducted a range of promotional activities across Asia, resulting in a number of corporate incentive trips to the Republic of Korea in 2017. These include visits by Extra Excel, Mercuries Life Insurance and other Chinese groups, which will bring a combined total of 30,000 inbound visitors. To attract more incentive travellers, KTO is providing full or partial support for corporations and organizations that send incentive tour groups to visit the Republic of Korea from abroad. This support is extended to corporate groups 10 – 1,000 pax and above, with at least two days spent in the country.

In-kind support can range from a high quality keepsake for each participant, or a welcoming ceremony, or free admission to a Korean performance or a tourist attraction which includes

<sup>6</sup> Yanzi, D. (2015), 'South Korea a quality MICE destination', *China Daily Asia*, 30-04-2015 (online), available at: [www.chinadailyasia.com](http://www.chinadailyasia.com) (13-12-2016).

selected theme parks and museums, and the Hanhwa Aquaplanet aquarium. Many incentive travel programmes also include visits to sites where popular K-dramas such as “Descendants of the Sun” which has a massive fan base in China and Thailand, were filmed. With the wide variety of things to see and do – from temple stays to K-pop concerts – this destination is a big draw to corporate incentive groups who want to mix business with pleasure.

### 8.2.2 Association congress

Today, as the Republic of Korea rides on the crest of its “K-Wave” – in this case, the Knowledge Economy wave – there are knowledge hubs all over the peninsula. As an example, Busan, the second biggest city in the Republic of Korea, is spearheading economic growth in the southern provinces with maritime, shipping, as well as the creative industries such as film and animation while up north, Songdo is a sustainable ecosensitive city of the future in Incheon. Both cities are positioning themselves as logistics and distribution hubs in North-East Asia. The Republic of Korea with leading universities has made its research and development (R&D) and visible cybernetics to the world. Its lead in heavy industries and energy further cements its synergy with global businesses. The country is adopting an increasingly important role in the global biopharmaceutical sector thanks to the huge billion dollar investment that the government has agreed to inject over the course of ten years in R&D. At the opening event of BioKorea 2016, the former first Minister of the Republic of Korea, Hwang Kyo-Ahn, announced that the government has taken steps for the country to become the seventh world power in the biomedical industry<sup>7</sup> by investing more in R&D on medicine, medical devices and cosmetics. The biotech industry is widely viewed as the nation’s next growth engine after IT.<sup>8</sup>

Two Korean city convention bureaus – Seoul Convention Bureau and Daejeon International Marketing Enterprise (DIME) – are members of global convention bureau alliances which are focused on the meetings industry. Seoul Convention Bureau is a member of Future Convention Cities Initiative, while Daejeon is a member of the Global Science and Convention Alliance.

The Republic of Korea will welcome 155 international association congresses between 2017 and 2025, across a wide range of disciplines and taking place in the various cities. These include the International Conference on Neutron Scattering in Daejeon; World Congress of the Organization of World Heritage Cities in Gyeongju; Asian Conference on Lactic Acid Bacteria in Gwangju; International Conference on Structural Mechanics in Reactor Technology in Busan; World Congress of the International Society for Education through Art in Daegu; International Symposium on Glycoconjugates in Jeju; World Veterinary Congress in Incheon; Asian/Australasian Congress of Anaesthesiologists in Seoul; and the 130th session of the International Olympic Committee in PyeongChang are just some examples recorded by ICCA.<sup>9</sup>

7 Sohn, J.Y. (2016), ‘Korea aims to become global bio-health leader’, *The Korea Herald*, 30-03-2016 (online), available at: [www.koreaherald.com](http://www.koreaherald.com) (13-12-2016).

8 Kim, H.J. (2016), ‘S. Korea releases comprehensive strategy on bio industry’, *Yonhap News Agency*, 08-09-2016 (online), available at: [www.english.ynhapnews.co.kr](http://www.english.ynhapnews.co.kr) (13-12-2016).

9 International Congress and Convention Association – ICCA (n.d.), *Association Database*, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (05-08-2016).

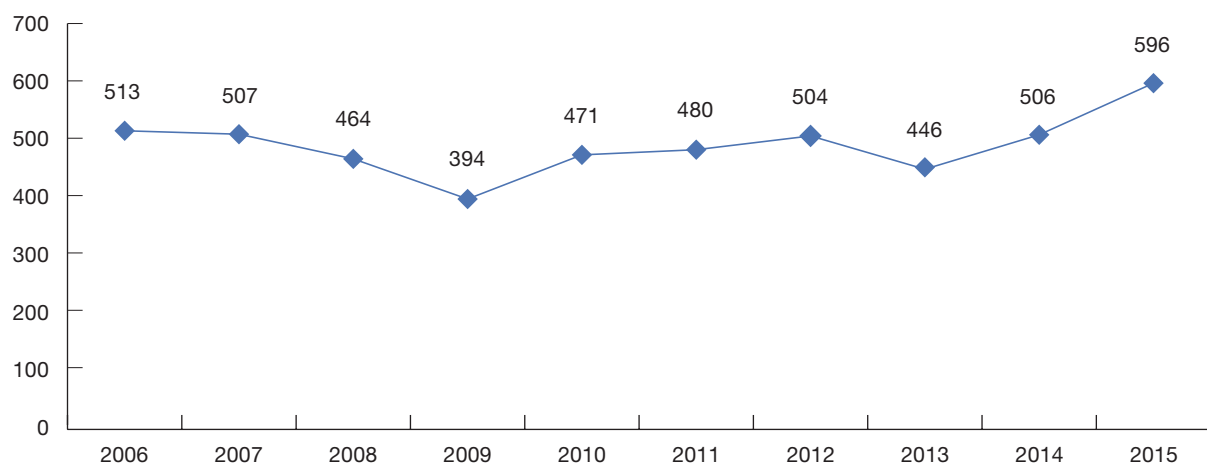
ICCA further recorded that there are 90 global associations where the key contact person is based in the Republic of Korea. For example, the Secretary-General of the Asian Pacific Organization for Cancer Prevention which organizes two rotating meetings is based in the Department of Preventive Medicine of Seoul National University. In 2018, Seoul will host its General Assembly. Similarly, the presidency of the Federation of International Robot-Soccer Association (FIRA) currently sits within the Korea Advanced Institute of Science and Technology or KAIST. The Republic of Korea has hosted the FIRA Robot World Conference four times, the last one in 2015 in Daejeon.

**Upcoming association meetings:**

- 26th Congress of the International Union of Architects, July 2017, Seoul (estimate 7,239 pax)
- 14th International Congress on Parasitology 2018, Daegu (estimate 2,000 pax)
- 31st General Assembly of the International Astronomical Union – IAU 2021, Busan (estimate 2,500 pax)

In 2015, the average size of international Association meetings in the Republic of Korea was recorded at 596 pax, the highest in the last decade. Only meetings of which the participant numbers are stored in ICCA Data, including added averages, are included in this figure.

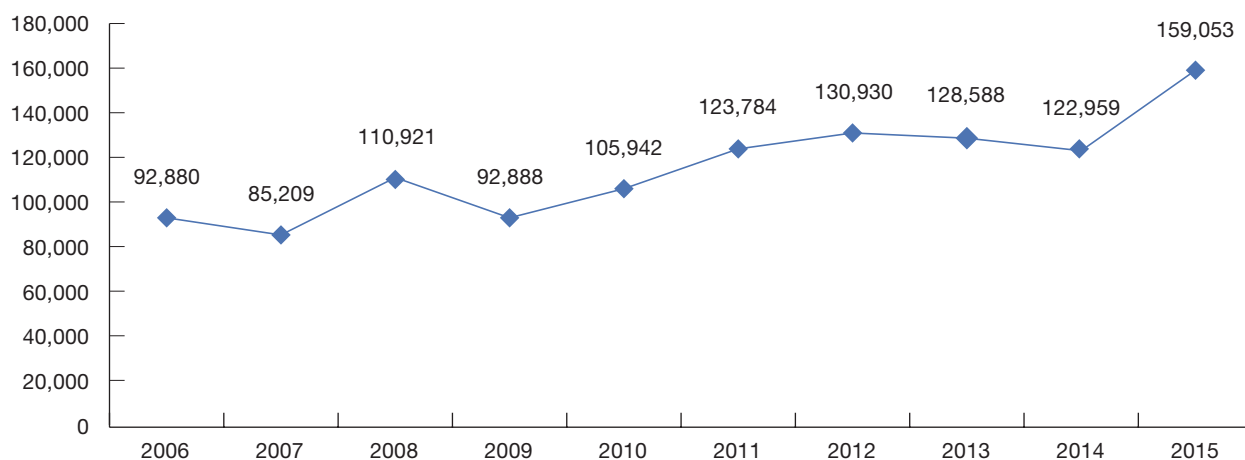
Figure 8.2 Average number of participants attending meetings in the Republic of Korea, 2006–2015



Source: International Congress and Convention Association – ICCA, *Destination Comparison Report*, electronic (19-08-2016).

2015 also saw the Republic of Korea posting the highest estimated total number of participants at international association congresses. The estimated total number of participants is calculated by multiplying the total number of meetings in the Republic of Korea with the average number of participants per meeting. This formula enables meetings where no accurate figures are known to be included in the estimated total. According to ICCA's *Destination Comparison Report*, the estimated total number of convention delegates for the republic was 159,053, the highest number in the last ten years.

Figure 8.3 **Total number of participants at international association meetings in the Republic of Korea, 2006–2015**



Source: International Congress and Convention Association – ICCA, *Destination Comparison Report*, electronic (19-08-2016).

### 8.2.3 Exhibition

In May 2016, Reed Exhibitions announced its acquisition of the Electronics Manufacturing Korea show and three of the Home Table Deco Fairs held across multiple cities in the country. The events have been acquired from K.Fairs, a highly regarded trade fair organizer in the Republic of Korea, with whom Reed Exhibitions had already partnered in 2014 to organize Kormarine, the country's largest international maritime industry event. Reed had earlier joined with COEX, a leading exhibition venue to organize International Franchise Seoul, the largest franchise trade show in the Republic of Korea. COEX is the country's biggest exhibition organizer with more than 20 international annual trade shows, including eleven officially approved by UFI. Earlier this year, COEX and BEXCO (Busan Exhibition and Convention Center) – two of the nation's leading venues – signed a memorandum of understanding (MOU) to collaborate with the aim of building their exhibition markets through information exchange, research and jointly organizing local and specialised exhibitions. Exhibitions not only represent the signature events in their respective sectors in the Republic of Korea and in Asia, but also act as an important driving force and benchmark in their industries. The Association of Korean Exhibition Industries (AKEI) was formed in September 2002 under the auspices of the Ministry of Commerce, Industry and Energy. Currently there are 38 member companies that represent the exhibition industry.

Trade and investment relations between ASEAN and the Republic of Korea have deepened, especially in recent years, with two-way trade reaching USD 118.6 billion in 2015, almost 5.6% of ASEAN's total according to ASEAN Secretary General Le Luong Minh. "The two can strengthen bilateral trade and investments by enhancing collaboration in areas of mutual interest and complementary advantages, such as the shipbuilding, electronics, ICT, automobile and chemical industries, among others," he added.<sup>10</sup> The partnership between ASEAN and the Republic of Korea has made remarkable progress since relations were established in 1989. Since *hallyu* or the

<sup>10</sup> The Korea Times, 27-07-2016, 'ASEAN seeks Korean role in economic integration' (online), available at: [www.koreatimes.co.kr/www/news/biz/2016/09/488\\_210518.html](http://www.koreatimes.co.kr/www/news/biz/2016/09/488_210518.html) (13-12-2016).

Korean Wave is popular across ASEAN, this will help firms develop new markets – leading to more business events – in the region.

Trade shows net space sold in the Republic of Korea in 2015 expanded by 3.7%, which is under the regional average of 5.6%, according to UFI's latest *Trade Fair Industry in Asia* report.<sup>11</sup> At the recent Global Games Exhibitions (G-Star) held in Busan in November 2016, 37 ASEAN start-up companies from nine countries participated. The event is aimed at promoting ASEAN game software in the country's market while providing business networking opportunities among ASEAN companies and buyers from the Republic of Korea.

### 8.3 Many faces, same success

The capital city Seoul has played host to numerous significant global events including the ASEM (Asia-Europe Meeting) 2000, the Seoul G20 Summit of 2010 and Nuclear Summit Seoul 2012, which clearly established its credentials as a destination capable of handling highly sophisticated events with demanding logistics and security requirements and equally qualified service providers. This combination provides meetings organizers and planners with confidence in Seoul as a destination. The establishment of the Seoul Convention Bureau (SCB), a division of the Seoul Tourism Organization (STO) in 2008, brought new vigour to the meetings industry by creating a support system to provide services to associations and business event planners. Local bid committees – which include the Korean Statistical Society who recently clinched the honour to host the International Biometric Society in 2020 – have attributed their success to STO's Bidding Support Clinic, among others. The Republic of Korea competed successfully against China and India to host this event regarded as the Olympics of applied statistics and mathematics in the fields of biology, health, medicine, environment and agriculture.

On the global front, Seoul is one of the founding members of the Future Convention Cities Initiative (FCCI). FCCI is a group of member cities – Seoul, Sydney, London, Toronto, Abu Dhabi, San Francisco and Durban – who collaborate and use the latest technology, innovation and research to increase the socio-economic benefits of meetings for their cities.

Seoul is a popular destination for meetings. The Government of the Republic of Korea would like to highlight other cities that are all capable of hosting multinational businesses and their events.

The Songdo International Business District, one of the three regions of the Incheon Free Economic Zone, is home to many multinational organizations like the Green Climate Fund (GCF), Cisco, Amcor, POSCO and Samsung Bioepis, opening doors for various corporate meetings and international events. In late 2012, Songdo was chosen as the permanent home to the environment-oriented fund, beating two other major competitors – Geneva and Bonn – in the competition to host the secretariat. The city is also home to World Bank Korea Office.

In order to add value to meeting organizers, Korean cities have taken to differentiate their niche offerings. For example, Busan, a port city, is specialising in maritime issues among others. Busan

11 The Global Association of the Exhibition Industry (UFI), 21-07-2016, 'UFI releases new report on the trade fair industry in Asia' (online), available at: [www.ufi.org/wp-content/uploads/2016/07/2016-07\\_UFI\\_BSG\\_Report\\_July\\_2016.pdf](http://www.ufi.org/wp-content/uploads/2016/07/2016-07_UFI_BSG_Report_July_2016.pdf) (10-12-2016).

hosted the Lions Club International Convention in 2012, welcoming over 50,000 global members. Its Busan International Film Festival is widely anticipated. On the other hand, Daegu's brand image is 'green and solar' and its focus is also on renewable energy and textile and fashion. Jeju has hosted many events related to environmental conservation especially since being named one of the New 7 Wonders of Nature, while Gyeongju keeps its eye out for history and heritage-themed conventions. The 2018 Winter Olympics host Pyeongchang and its province Gangwon is already looking at international events related to nature and the environment which will align well with the city's branding on wellness. It will host the Pan Asia Hash 2017, an international running event expected to attract about 50,000 participants.

Thanks to KTO's global development programme that supports business events paired with cities with expertise in specific industries, convention cities in the Republic of Korea are rapidly developing and contributing to the republic's growing conventions and meetings profile. In 2016, KTO supported four business events that took place in Gyeonggi, one each in Incheon and Gangwon, two each in Daejeon, Gwangju and Busan and three in Daegu.

These are just some examples, and the eleven convention cities in the Republic of Korea have proud and strong records to prove their capabilities as host of international businesses and meetings. The number of international and national chain hotels has increased. Shilla and Lotte are also contributing to the range of accommodation available to meetings attendees. In addition, the wide range of unique venues opening or being repurposed means there will be no shortage of suitable venues, be it for product launches or social programmes, for any type of business event taking place in the republic.

## 8.4 Fuelled by innovation

Home of global conglomerates like Samsung and LG, the country's technological prowess has awed the world. The Republic of Korea has the highest average connection bandwidth to Internet users and boasts a highly efficient IT infrastructure which is the signature of all its convention centres. Innovation and technology are the key factors that have underpinned export competitiveness from the Republic of Korea and fuelled the country's remarkable economic rise over the past decades. According to recently released data by the Organization for Economic Co-operation and Development (OECD), the country spent 4.3% of its GDP on research and development (R&D) in 2014.<sup>12</sup> Spending more on R&D than any other economy not only reflects a domestic consumer base with a high demand for new technological developments, but also the government's objective to build a creative economy.

In addition, the 2016 Bloomberg Innovation Index ranked the country as having the world's most innovative economy, ahead of Germany, Sweden, Japan and Switzerland.<sup>13</sup> The index evaluated nations according to six different categories, including R&D, high-tech companies, manufacturing, research personnel, patents and education. As the meetings industry evolves and places more demand on technology to communicate ideas and connect participants and create

<sup>12</sup> Organisation for Economic Co-operation and Development (2016), 'Main Science and Technology Indicators', OECD (online), available at: [www.oecd.org](http://www.oecd.org) (13-12-2016).

<sup>13</sup> Jamrisko, M. and Lu, W. (2016), 'These are the world's most innovative economies', *Bloomberg Markets*, 19-01-2016 (online), available at: [www.bloomberg.com](http://www.bloomberg.com) (13-12-2016).



business relationships, the Republic of Korea has always stood out for its IT infrastructure and ability to integrate cutting-edge technology into meetings and enrich the learning and connecting experience.

## 8.5 Converging global knowledge

Nationwide infrastructure growth has played a key role in boosting the republic's competitiveness in the meetings industry. These include expanded facilities in future Pyeongchang 2018 Winter Olympics host Gangwon Province, and ongoing expansions to SongdoConvensiA in Incheon's International Business District. Latest regional convention facilities include the new Asia Culture Center in southeastern city Gwangju and Hwabaek International Convention Center (HICO) in the southwestern UNESCO capital of Gyeongju.

### 8.5.1 HICO – Hwabaek International Convention Center, Gyeongju



Hwabaek International Convention Center Gyeongju,  
Photo courtesy: Gyeongju CVB/HICO.

The ancient Silla Kingdom's capital, Gyeongju is known for its countless Korean historical sites and its cultural properties. HICO's name was inspired by the Silla's Kingdom state body called *Hwabaek*. At this council, the most important issues of the kingdom were debated openly and approved unanimously. As such, it is befitting that HICO represents the convergence of discussions, meetings, ideas and knowledge, not only from the

Republic of Korea but from around the world. The centre opened in March, 2015 and since then it has hosted numerous international conventions, including as joint host, with Daegu EXCO, of the 7th World Water Forum in April 2015. On its Future Meetings Calendar, among others in 2017, HICO will host the International Symposium on Future IC for Nuclear Power Points (ISOFIG 2017), 14th General Meeting of the World Association of Nuclear Operators, the International Symposium on Green Manufacturing and Applications, and 14th World Congress of the Organization of World Heritage Cities (OWHC). Gyeongju is the host of OWHC's Asia Pacific Regional Secretariat.

Gyeongju is the proud home of three UNESCO World Heritage sites: the Bulguksa Temple/Seokguram Grotto, the Gyeongju Historic Area, and the Korean Traditional Village of Yangdong. As the capital city of the first kingdom that united the Korean peninsula, Gyeongju had been the capital city of the dynasty for 992 years and has achieved great cultural development through exchanges with the cities in other civilizations throughout the long period.

The design of HICO is a fusion of traditional patterns and modern lines, incorporating cultural assets and nature's gifts. It was designed to achieve low energy consumption, and the use of regenerated solar energy for its nocturnal illumination is just one example. HICO is not just a beautiful and functional convention centre; it is also Gyeongju's Cultural Space. The convention centre's walls are adorned with recreations of Silla relics such as "The Heavenly Horse", "Joikyeonggwansik", "The image of a flying fairy on bell of King Seongdeok" and "Youngji Lake". In 2015, HICO was honoured with the Gyeongju City Architecture Awards (Gold). HICO can sit a plenary of 3,500 pax



and offers 14 breakout rooms including two executive meeting rooms suitable for board meetings. Its exhibition Hall of 2,273 m<sup>2</sup> can support 115 standard booths (3 × 3 m). The foyer areas, suitable for networking coffee breaks are always bathed in natural sunlight with views of the surrounding vistas. There are ten hotels of various categories within easy walking distance (1 km and less) offering a total of 2,121 rooms and as such provides an excellent facility package for meeting planners. In total, the city has 21 hotels offering 4,245 quality hotel rooms. Visiting Gyeongju for business or for leisure is easy with options to fly in via Busan or Daegu, or use the high speed rail KTX from Incheon Airport and Seoul.

In December 2016, HICO hosted the Korea MICE Alliance Conference and Awards which saw meeting professionals from all over the country coming together for a day of education, meetings, an awards dinner, followed by side trips to learn more about this city which is known as “The Museum Without Walls” and one of the most popular tourist destinations in the Republic of Korea.

(To learn more about HICO’s meetings and exhibitions facilities, please visit: <http://eng.crowncity.kr/> or refer to the Gyeongju Meeting Planners Guide available from Gyeongju Convention and Visitors Bureau.)

**Table 8.1 Convention centres in the Republic of Korea**

City/convention center	Maximum capacity (theater type/ class type)	Number of meeting rooms (capacity, m <sup>2</sup> )	Number of exhibition halls (capacity, m <sup>2</sup> )
<b>Busan/BEXCO</b> Korea’s second largest city is also Asia’s 4th best convention city (2013, UIA), boasting picturesque mountains and beaches	4,002/2,000	22–50 (12,662 m <sup>2</sup> )	5–16 (46,380 m <sup>2</sup> )
<b>Changwon/CECO</b> The industrial hub with R&D centers for global companies like Hyundai and Volvo also has an eco-tourism industry	7,000/3,600	4–12 (2,786 m <sup>2</sup> )	1–2 (7,827 m <sup>2</sup> )
<b>Daegu/EXCO</b> The industrial city is a major player in manufacturing, especially textiles and electronics, as well as in high-tech healthcare	8,000/5,900	24–36 (12,697 m <sup>2</sup> )	5–9 (23,000 m <sup>2</sup> )
<b>Deajeon/DCC</b> The science and technology city is also Korean’s administrative capital thanks to its convenient transportation network	2,000/900	5–20 (4,862 m <sup>2</sup> )	1–4 (2,520 m <sup>2</sup> )
<b>Goyang (Gyeonggi)/KINTEX</b> The popular region next to Seoul has many theme parks and sports	70,000/35,000	29–39 (13,303 m <sup>2</sup> )	10–20 (108,556 m <sup>2</sup> )
<b>Gunsang/Saemangeum/GSCO</b> The picturesque coastal city has a well- developed marine tourism industry and especially designated free economic zone	2,000/900	14 (1,712 m <sup>2</sup> )	1–3 (9,072 m <sup>2</sup> )
<b>Gwangju/Kimdaejung Convention Center</b> Known for its rich history, cuisine and nearby green tea fields, the city is celebrated for its gallery district and art festivals.	3,000/1,300	10–31 (6,526 m <sup>2</sup> )	1 (3,000 m <sup>2</sup> )

City/convention center	Maximum capacity (theater type/ class type)	Number of meeting rooms (capacity, m <sup>2</sup> )	Number of exhibition halls (capacity, m <sup>2</sup> )
<b>Gyeongju/HICO</b> The ancient capital of Silla is called an 'open-air museum' for its wealth of historical artifacts and UNESCO World Heritage Sites	3,500/1,800	13 (12,927 m <sup>2</sup> )	2 (6,273 m <sup>2</sup> )
<b>Incheon/Songdo Convensia</b> The transportation hub is home to Songdo, the international business district with State-of-the-art convention facilities	1,920/1,050	10–23 (2,304 m <sup>2</sup> )	1–2 (8,416 m <sup>2</sup> )
<b>Jeju/ICC Jeju</b> The ecological paradise featuring beaches, caves, and other UNESCO designated natural wonders attracts visitors year round	4,300/3,500	16–27 (7,930 m <sup>2</sup> )	1–3 (2,395 m <sup>2</sup> )
<b>Pyeongchang (Gangwon)/Alpensia Convention Center</b> Home of the 2018 Winter Olympics, the mountain region is the go-to destination for outdoor sports and healthy lifestyle for enthusiasts	2,000/1,100	14 (2,813.6 m <sup>2</sup> )	–
<b>Seoul/COEX</b> Historically the heart of Korea, the capital is now a global metropolis and a major economic hub driving cultural innovation in Asia	7,000/3,500	54–92 (11,573 m <sup>2</sup> )	4–12 (35,278 m <sup>2</sup> )

Source: Korea Tourism Organization.

Table 8.2 Regional convention bureaus and DMOs in the Republic of Korea

<b>Busan</b> Busan Tourism Organization	Busan is the country's principal seaport and second largest city. The city is known for being the largest logistics port city in the Republic of Korea, as well as the site of the Busan International Film Festival (BIFF).
<b>Changwon</b> Gyeongnam Convention & Visitors Bureau	Located in the heart of the country's manufacturing and industrial region, Changwon offers benchmarking tours to leading companies of the Republic of Korea, including Samsung, LG, Doosan and many more as a center for the machinery, shipbuilding and robotics industries.
<b>Daegu</b> Daegu Convention & Visitors Bureau	Daegu, where you can visit four UNESCO World Heritage Sites in the vicinities, is a major player in the textile and electronics industry. Furthermore, the city has a transportation network linking in all directions.
<b>Daejeon</b> Daejeon International Marketing Enterprise	The city serves as the country's second administrative capital and a major transportation hub. Daejeon is also the hub of science and technology industries, so it offers an excellent environment for hosting academic conferences related to state-of-the-art technology and engineering.
<b>Gangwon</b> Gangwon Convention & Visitors Bureau	As the venue for the Pyeong Chang 2018 Olympic Winter Games, Gangwon allows a healthy lifestyle and leisure activities that you can enjoy all year around.
<b>Gwangju</b> Gwangju Convention & Visitors Bureau	As the economic and educational center of the south-western area for centuries, Gwangju has long been recognized for its rich culture and arts. Gwangju is famous for Korean cuisine, exuberant cultural and artistic resources, and unique tourism sites.

<b>Gyeonggi</b> Gyeonggi Tourism Organization	Located in the central-west area of the country and surrounding Seoul, Gyeonggi is blessed with Suwon Hwaseong Fortress, a UNESCO Cultural Heritage. Gyeonggi strength lies in its proven track record for hosting large exhibitions with a well-established infrastructure.
<b>Gyeongju</b> Gyeongju Convention & Visitors Bureau	Gyeongju was the center of the Silla Dynasty in AD 57 and its capital for over one thousand years. Many treasures and historical sites from Silla period are to be found here including Bulguksa Temple and Seokguram Grotto which have been designated as part of the World Cultural Heritage by UNESCO.
<b>Incheon</b> Incheon Development & Tourism Corporation	Designated as a free economic zone, Incheon is a major port city and was home for the Green Climate Fund in 2013.
<b>Jeju</b> Jeju Convention & Visitors Bureau	Jeju is home to many picturesque beaches, waterfalls, cliffs, caves and wild landscapes filled with flowers and green areas. No visa, no tax: visitors from 180 countries may stay up to 30 days without visa (eleven countries are exceptions).
<b>Seoul</b> Seoul Tourism Organization	Seoul is the nation's financial hub and a modern metropolis where traditional and modern architecture coexist harmoniously.

Notes: The Daejeon International Marketing Enterprise (DIME) is a member of Global Science Convention Alliance with Adelaide, Hyderabad, Toulouse, Prague and Oslo.  
The Seoul Convention Bureau, under the Seoul Tourism Organization, is a member of Future Convention Cities Initiative (FCCI) together with Abu Dhabi, Durban, London, San Francisco, Sydney and Toronto.

Source: Korea Tourism Organization.

In 2010, Korea MICE Bureau KMB (then known as the Korea Convention Bureau) was revamped to include responsibility for all four segments of meetings – corporate meetings, incentive travel, international conferences and exhibitions and events. In addition, the bureau, along with the Medical Tourism Center and the Inter-Korea Tourism Center, has been classified under the area of New Growth Business. To support international meetings which bring at least 500 overseas participants to the Republic of Korea, customised programmes are available to help improve the quality and boost the ‘brand’ of each event. The support provided can be in the form of a visitors information booth at the convention site, or promotion of the said event on the 23 multi-cube digital display screens at the Incheon International Airport baggage claim area. When Rotary International met in Seoul in 2016, the convention made full use of KMB’s support packages. Other major 2016 events which benefitted from such convention-support programmes include the 7th World Fisheries Congress and the 94th General Session and Exhibition of the International Association for Dental Research – IADR. The three events alone will see approximately 53,000 delegates.

In addition, the Korea MICE Bureau conducts safety training programmes for tourism bodies and professional convention organizers associated with each event to ensure smooth running and preparedness. Issues covered include identifying potential dangers, rapid response procedures and accident management. These initiatives join the ever-growing range of Korea MICE Bureau support programmes for large-scale events hosted in the Republic of Korea, in addition to the assistance with pre and post-tours, site inspections, cultural entertainment subsidies, bid presentations, and other related requests and services. KMB works closely with the eleven regional convention bureaus to ensure a yearlong calendar of meetings for the Republic of Korea.

## 8.6 Success stories

Here is a selection of three mega international conventions hosted by the Republic of Korea which left lasting impacts, not only for the host communities, but also for the world.

### 8.6.1 Rotary International Convention 2016, Seoul



**Date:** 28 May – 1 June 2016  
**Venue:** KINTEX, Gyeonggi-do Province  
**Organizer:** Rotary International Convention Host Organizing Committee (HOC) and Seoul Host Organization Committee  
**Attendance:** 45,000 participants (160 countries)

Rotary International's (RI) centennial celebration for its 1.2 million members took place in Seoul in 2016 with some 45,000 members from 160 cities converging at KINTEX in Goyang City. For the first time in RI's 100 year history, the International Convention and District Conventions were held simultaneously. A total of 27 "Rotarians Welcome" tours were offered to all participants giving them a diverse range of insights into the Republic of Korea. In addition to the economic impact from the overseas visitors and numerous global friendships forged, the convention also left behind lasting legacies for the host community and those around the world.

With the theme "Connect with Korea – Touch the World", the RI Convention in the Republic of Korea truly touched the world in more ways than one:<sup>14</sup>

- The Water and Sanitation Rotarian Action Group (WASRAG), a group of Rotarians dedicated to water sanitation and hygiene programmes, took the opportunity to hold their 8th Rotary World Water Summit during the RI Convention at KINTEX. At the Summit, the Coca-Cola Company announced a partnership with Rotary International and Pakistan National Polio Plus Committee to provide 10 million Rupees in funding for seven solar water filtration plants in areas at high risk for communal and water borne diseases. The solar water filtration plants will benefit a total target population of 140,000 in the catchment areas, with each plant recharging 3,000 gallons of water twice a day per shift. The Summit was jointly hosted by WASRAG and the Seoul Metropolitan Government;
- Young leaders, through the recommendations of their RI Districts (there are 535 districts around the world) were invited to participate in the inaugural Young Leaders Summit (YSL). This new exciting programme was offered to 1,000 young leaders between the ages of 19 and 35;
- RI members brought with them more than 10,000 illustrated children books in their own languages and presented them to the newly renovated Juyeop Children's Library in Goyang City. The library will serve the country's growing ethnic, linguistic and multicultural population while giving the readers a window to the world; and
- The RI convention participants had the opportunity to participate in a service project packaging 150,000 meals for the world's hungry in the "Stop Hunger Now" project. The

14 Bhagat, R. (2016), *A colourful convention at Seoul* (online), available at: [www.rotarynewsonline.org](http://www.rotarynewsonline.org) (13-12-2016).

packaged meals of highly nutritious dehydrated meals comprising rice, soy, vegetables and 23 essential vitamins and minerals will be distributed to Cambodia.

### 8.6.2 World Water Forum 2015, Daegu and Gyeongbuk



**Date:** 12–17 April 2015  
**Venue:** Daegu EXCO and Gyeongju HICO  
**Organizer:** Ministry of Land, Infrastructure and Transport and World Water Council  
**Attendance:** 40,000 delegates (168 countries)

This was the second time the World Water Forum (WWF) was held in Asia, the first time was in Japan eleven years ago. Daegu/Gyeongbuk successfully competed against Glasgow to win the honour to host the 2015 edition. The WWF is a triennial event with an average of 3,500 participants.

In line with the Government's industry cluster focus, Daegu has a vision to turn itself into a linchpin of the water industry. Its strategy is to capitalise on WWF and become the centre of the water industry of the Republic of Korea. Daegu has developed its own traditional culture and industries around the Nakdong River and has accumulated abundant knowledge and experience in water quality management. The Government has prioritised sustainable water management and sound water environment building in its national agenda with the goal to become a role model country in all areas of water management.

Table 8.3 Broader impacts from 7th World Water Forum



#### Attendance:

40,000 entries	71 parliamentarians
168 countries	95 local and regional authorities
10 world leaders	400 sessions and events
121 official national government ministers	900 journalists from five continents

#### Numbers beyond USD and cents: Impact on the 7th World Water Forum in Daegu/Gyeongbuk

18 Memorandums of Understanding and 50 bilateral and multilateral meetings:

- Colorado River Management agreement between the United States of America and Mexico;
- Cooperative framework for water resources policy between Ministry of Land, Infrastructure and Transport (Republic of Korea) and Ministry of Environment and Natural Resources Protection (Georgia) and Ministry for Climate Change of Pakistan (Pakistan) for enhanced cooperation;
- Daegu/Gyeongbuk Prizes awarded to Ricardo Alba (Colombia) and Kanupriya Harish (India) for their contribution to water management issues in their respective countries; and
- Kyoto World Water Grand Prize was awarded to the Environment and Public Health Organization of Nepal for its outstanding grassroots activities in dealing with water problems.

Note: The 7th World Water Forum 2015 website, *Forum Outcomes* (online), available at: <http://worldwaterforum7.org/outcome/fo/list.asp> (13-12-2016).

Sources: GainingEdge.

Additionally, the local host committee and the Daegu Convention and Visitors Bureau ran their “Be A Green Man”, “Daegu Sprouts” and “Kids Carbon Detective” campaigns to inculcate the importance of sustainability in everyday issues among the citizens of Daegu-Gyeongbuk. More than its political, future-shaping outcomes, the 7th World Water Forum hosted by the Republic of Korea will be known as the most socially integrated and environmentally friendly forum ever.

### 8.6.3 IUCN World Conservation Congress 2012, Jeju



**Date:** 6–15 September 2012  
**Venue:** ICC Jeju (International Convention Center Jeju)  
**Organizer:** IUCN – International Union for Conservation of Nature  
**Attendance:** 10,583 participants (173 countries)

The IUCN World Conservation Congress (WCC) is the world’s largest and most important conservation event aimed at improving and managing the natural environment. This congress which sees an average participation size of 7,500 pax is organized by the International Union for Conservation of Nature – IUCN based in Switzerland.

Traditionally, a World Conservation Congress is hosted by one of IUCN’s State Members. Preference is given to countries and regions where Congresses have not been held in recent years. As such, the Republic of Korea hosting the WCC which takes place once every four years, in 2012, just after Thailand hosted in 2004 is an achievement that speaks volumes of the host destination Republic of Korea. It was also the first time that IUCN in its 60 years of history has taken its congress to Northeast Asia. The Republic of Korea immediately leveraged on the opportunity to showcase its leadership in the environment field to the 10,000 strong delegation which includes 1,100 non-government organizations.

The Ministry of Environment of the Republic of Korea and the Jeju Special Self-Governing Province hosted WCC which comprised over 600 events held during the five-day Forum, including five World Leaders’ Dialogues (WLD) and the Members’ Assembly which approved over 180 resolutions and recommendations. Business presence was unprecedented, with over 100 business representatives participating.

The first World National Parks CEOs Forum was held in Jeju, bringing together over 120 leaders in protected areas. It resulted in the Jeju Declaration on National Parks and Protected Areas: Connecting People to Nature, a commitment to a global campaign for re-connecting people with nature through national parks and protected areas. This will generate a global protected areas awareness campaign. The Jeju Congress set the pace for the 2014 IUCN World Parks Congress with agreements reached between IUCN, the Government of Australia and the Government of New South Wales regarding the design, development, convening and follow-up of this important event for protected areas.



IUCN signed a three-year collaboration signed with the Thai Public Broadcasting Service (TBS) which includes joint efforts to include capacity building for journalists on environmental reporting and citizen journalism training. Nearly 100 media-related events took place at IUCN Jeju – including 60 press conferences – and over 320 media representatives were onsite to report from Jeju. The total coverage of the congress worldwide resulted in a readership of over one billion people. The 2012 IUCN Congress embraced new technology and shared the major events live through web streaming, and video relays to the global audience. The most outstanding success in moving the congress to cyber-sphere was in social media. With nearly 8,000 mentions in the Twittersphere, close to 4 million individuals were reached which led to a knock-on effect of over 17 million impressions. Twitter allowed the congress to become viral, with influential figures and organizations participating in its dissemination. Figures such as Richard Branson and Bianca Jagger took an active role in tweeting about the congress, as well as IUCN Patron Sylvia Earle and Goodwill Ambassador Alison Sudol. The World Bank, United Nations Environment Programme, Holcim, Nespresso and Syngenta were among the organizations that helped the distribution of IUCN tweets. These new technologies have grown to be valuable tools to engage multiple stakeholders, encourage debate and raise public awareness. Through the 2012 IUCN World Conservation Congress, IUCN was successful in harnessing this potential. With its high IT skills and connectivity, The Republic of Korea was the perfect launching ground for driving new opportunities for IUCN through the use of new technologies which were supported by its ground-breaking IT infrastructure.

Table 8.4 Social media statistics from IUCN 2012

	Social media statistics	During congress
	Twitter outreach total (individual people)	3.92 million
	Twitter outreach total (impressions)	17.32 million
	Twitter mentions	7,937
	Facebook content views (daily average)	30,000

Note: All results are for 6–15 September 2012.

Source: IUCN World Conservation Congress, 'Breaking borders on the web', Congress highlights (online), available at: [https://cmsdata.iucn.org/downloads/2012\\_congress\\_highlights\\_final\\_pxp.pdf](https://cmsdata.iucn.org/downloads/2012_congress_highlights_final_pxp.pdf) (13-12-2016).

An independent greenhouse gas assessment conducted by the Korea Environmental Industry and Technology Institute (KEITI), estimated that the Jeju Congress generated 6,846 t of CO<sub>2</sub> equivalents. With the majority of participants and staff travelling from 173 countries around the globe, air travel to the Republic of Korea represented the largest source of greenhouse emissions at around 70% of the total. Onsite, emissions remained minimal due notably to the high environmental standards of the conference venue ICC Jeju. However, thanks to the support of participants and donors, the total estimated footprint of the Jeju Congress was offset 100% through an investment in forest rehabilitation. Contributions collected through the Jeju Carbon Offset Fund were used to purchase 6,846 t of CO<sub>2</sub> equivalents from Infapro, a project in Borneo, Malaysia. The project developer, Face the Future, in cooperation with the Yayasan Sabah Foundation, has rehabilitated approximately 12,000 ha of the targeted 25,000 ha of logged rainforest since 1992.<sup>15</sup>

<sup>15</sup> IUCN World Conservation Congress (2012), *Congress archives: 2012 World Conservation Congress, Jeju, Republic of Korea* (online), available at: [www.2012congress.iucn.org](http://www.2012congress.iucn.org) (13-12-2016).

IUCN Jeju certainly brought home gold for Republic of Korea's conservation efforts.

"I found this Jeju Congress to be the best IUCN has ever held. The volume of workshops and programmes was extraordinary and the business of the Union was dispatched with care and effectiveness."<sup>16</sup>

Prof. Nicholas Robinson, Former Chief of the IUCN Commission on Environmental Law

---

16 IUCN World Conservation Congress (2012), *Congress archives: 2012 World Conservation Congress, Jeju, Republic of Korea* (online), available at: [www.2012congress.iucn.org](http://www.2012congress.iucn.org) (13-12-2016).



---

## Conclusion

Around the world, national tourism offices, DMOs and convention bureaus embark on destination marketing programmes to fuel a larger visitor economy which will bring foreign exchange and broader economic growth. Additionally, the meetings industry will sustain the hospitality and business events infrastructure and improve the quality of life from investments and legacies left to the hosting communities. Without the political will and support from government, destination marketing will not be fully successful. In fact, cultivating good government contacts across a wide spectrum of industries is essential and will form the basis for an integrated all-in-government approach to the meetings industry.

A successful destination is one which also has the support and a high level of interest from its local community and stakeholders. This important group can make or break a destination's marketing efforts. Destinations need to support and ensure that their supply chain has the professionalism and know-how to serve both domestic and international business events, and deliver the "brand experience" that is expected and demanded.

As the market continues to evolve, it is vital that destinations can adapt to meet these changes. Destinations will need to stay abreast of industry demands whether it is adopting international practices; offering sustainable options; customising experiences or leveraging on the ubiquitous new technology. Clearly, to remain competitive, destinations will increasingly need to not only market themselves but also manage their destination brand; future-proof their competencies with capability training and capacity building, review their business models and drive new standards in line with new expectations.



# Annex

## International Congress and Convention Association (ICCA): Sub-region definitions

Region	Country	
Africa	Algeria	Madagascar
	Angola	Malawi
	Benin	Mali
	Botswana	Mauritania
	Burkina Faso	Mauritius
	Burundi	Morocco
	Cameroon	Mozambique
	Cape Verde	Namibia
	Central African Republic	Niger
	Chad	Nigeria
	Congo	Rwanda
	Congo, Democratic Republic of the	Sao Tome and Principe
	Djibouti	Senegal
	Egypt	Sierra Leone
	Equatorial Guinea	Somalia
	Eritrea	South Africa
	Ethiopia	St. Helena
	Gabon	Sudan
	Gambia	Swaziland
	Ghana	Tanzania
	Guinea	Togo
	Guinea-Bissau	Tunisia
	Ivory Coast	Uganda
	Kenya	Western Sahara Non-Self-Governing-Territory
	Lesotho	Zambia
	Liberia	Zimbabwe
	Libya	
Asia	Afghanistan	Brunei Darussalam
	Armenia	Cambodia
	Azerbaijan	China
	Bahrain	Christmas Island
	Bangladesh	Cocos (Keeling) Islands
	Bhutan	Comoros

Region	Country	
Asia	East Timor	Nepal
	Hong Kong, China	Northern Mariana Islands
	India	Oman
	Indonesia	Pakistan
	Iran (Islamic Republic of)	Palau
	Iraq	Philippines
	Israel	Qatar
	Japan	Reunion
	Jordan	Samoa
	Kazakhstan	Saudi Arabia
	Korea, Democratic People's Republic of	Seychelles
	Korea, Republic of	Singapore
	Kuwait	Sri Lanka
	Kyrgyzstan	State of Palestine
	Lao People's Democratic Republic	Syrian Arab Republic
	Lebanon	Taiwan Province of China
	Macao, China	Tajikistan
	Malaysia	Thailand
	Maldives	the Federated States of Micronesia
	Marshall Islands	Turkmenistan
	Mayotte	United Arab Emirates
	Mongolia	Uzbekistan
	Myanmar	Viet Nam
	Nauru	Yemen
Europe	Albania	Gibraltar
	Andorra	Greece
	Austria	Greenland
	Belarus	Hungary
	Belgium	Iceland
	Bosnia and Herzegovina	Ireland
	Bulgaria	Italy
	Croatia	Latvia
	Cyprus	Liechtenstein
	Czech Republic	Lithuania
	Denmark	Luxembourg
	Estonia	Malta
	Faroe Islands	Monaco
	Finland	Montenegro
	France	Montserrat
	Georgia	Norway
	Germany	Poland

Region	Country	
Europe	Portugal	Sweden
	Romania	Switzerland
	Russian Federation	the former Yugoslav Republic of Macedonia
	San Marino	The Netherlands
	Serbia	the Republic of Moldova
	Slovak Republic	Turkey
	Slovenia	Ukraine
	Spain	United Kingdom
	Svalbard and Jan Mayen	Vatican
Latin America	Anguilla	Guatemala
	Antigua and Barbuda	Guyana
	Argentina	Haiti
	Aruba	Honduras
	Bahamas	Jamaica
	Barbados	Martinique
	Belize	Netherlands Antilles
	Bolivia (Plurinational State of)	Nicaragua
	Brazil	Panama
	Cayman Islands	Paraguay
	Chile	Peru
	Colombia	Pitcairn
	Costa Rica	Puerto Rico
	Cuba	Saint Kitts and Nevis
	Dominica	Saint Lucia
	Dominican Republic	Saint Vincent and the Grenadines
	Ecuador	Surinam
	El Salvador	Turks and Caicos Islands
	Falkland Islands	Uruguay
	French Guiana	Venezuela (Bolivarian Republic of)
	Grenada	Virgin Islands (United Kingdom)
	Guadeloupe	Virgin Islands (United States of America)
North America	American Samoa	St. Pierre and Miquelon
	Bermuda	Trinidad and Tobago
	Canada	United States of America
	Mexico	
Oceania	Australia	Heard and McDonald Islands
	Cook Islands	Kiribati
	Fiji	New Caledonia
	French Polynesia	New Zealand
	Guam	Niue

Region	Country	
Oceania	Norfolk Island	Tonga
	Papua New Guinea	Tuvalu
	Solomon Islands	Vanuatu
	Tahiti	Wallis and Futuna Islands
	Tokelau	

---

# Glossary of acronyms

AACB	Association of Australian Convention Bureau
ACTE	Association of Corporate Travel Executives
ADT	Association of Domestic Travel
AEC	ASEAN Economic Community
AIF	Approved International Fair
AIPC	International Association of Convention Centres
AGM	Annual General Meeting
AMC	Association Management Company
AMVS	ASEAN MICE Venue Standard
APEX	Accepted Practices Exchange
APFAO	Asia-Pacific Federation of Association Organizations
ASAE	American Society of Association Executives
ASEAN	Association of Southeast Asian Nations
AR	augmented reality
ATTA	Association of Thai Travel Agents
AWE	AsiaWorld-Expo
B2B	Business-to-business
B2C	Business-to-consumer
BESydney	Business Sydney
BHA	Bali Hotels Association
BRICS	Brazil, Russian Federation, India, China and South Africa
CCOIC	China Chamber of International Commerce
CE	continuing education
CEM	Certified in Exhibition Management
CEPA	Closer Economic Partnership Agreement
CEU	Continuing Education Unit
CIC	Convention Industry Council
CMP	Certified Meeting Professional
CNTA	China National Tourism Administration
CO <sub>2</sub>	carbon dioxide
COP 15	15th Conference of the Parties
CSR	Corporate Social Responsibility
CTA	China Tourism Academy
DAC	Dubai Association Centre



DCVB	Daegu Convention and Visitors Bureau
DIME	Daejeon International Marketing Enterprise
DMAI	Destination Marketing Association International
DMC	destination management company
DMO	destination marketing organization
DOT	Department of Tourism
DTD	double tax deduction
EEAA	Exhibition and Event Association of Australasia
EMC	exhibition management company
EPP	entry point project
ESCA	Exhibition Services and Contractors Association
ETP	Economic Transformation Programme
ETS	Enterprise Training Support
FCCI	Future Convention Cities Initiative
FDI	foreign direct investment
GAHP	Global Association Hubs Partnership
GDP	gross domestic product
GBTA	Global Business Travel Association
GMP	good manufacturing practice
GRI	Global Reporting Initiative
GTEF	Global Tourism Economy Forum
HACCP	Hazard Analysis Critical Control Point
HCVB	Hyderabad Convention & Visitors Bureau
HKECIA	Hong Kong Exhibition and Convention Industry Association
HKTB	Hong Kong Tourism Board
HKTDC	Hong Kong Trade Development Corporation
HTC	Hangzhou Tourism Commission
IAEE	International Association of Exhibitions and Events
IAPCO	International Association of Professional Conference Organisers
ICCA	International Congress and Convention Association
ICE	Indonesia Convention and Exhibition
ICPB	India Convention and Promotion Bureau
IoT	Internet of things
IIMB	Indian Institute of Management Bangalore
IMEX	The Worldwide Exhibition for Incentive Travel, Meetings and Events
IMF	International Monetary Fund
INACEB	Indonesia Convention and Exhibition Bureau
IPIM	Macao Trade and Investment Promotion Institute
IRAS	Inland Revenue Authority of Singapore
JEXA	Japan Exhibition Association
JNTO	Japan National Tourism Organization
JTA	Japan Tourism Agency

KCVB	Kyoto Convention and Visitors Bureau
KINTEX	Korea International Exhibition Center
KTO	Korea Tourism Organization
MACEOS	Malaysian Association of Convention and Exhibition Organisers and Suppliers
MICE	Meetings, Incentive, Convention and Exhibitions
MIFF	Malaysian International Furniture Fair – MIFF
MPI	Meeting Professionals International – MPI
MyCEB	Malaysia Convention and Exhibition Bureau
NGO	non-governmental organization
NKEA	National Key Economic Area
O2O	Online-to-offline
PATA	Pacific Asia Travel Association
pax	people/persons/occupants
PCAAE	Philippine Council for the Advancement of Association Executives
PCM	Professional Conference Management
PCMA	Professional Convention Management Association
PCO	Professional Congress Organizer
PEM	Professional Exhibition Management
PSC	Portuguese Speaking Country
R&D	research and development
ROE	return on emotion
ROI	return on investment
ROO	return on objective
ROMI	return on meeting investment
SACEOS	Singapore Association of Convention and Exhibition Organisers and Suppliers
SCB	Sarawak Convention Bureau
SECB	Singapore Exhibition and Convention Bureau
SIWW	Singapore International Water Week
SFTA	San Francisco Travel Association
SITE	Society for Incentive Travel Excellence (SITE was formerly known as the Society for Incentive Travel Executives)
STB	Singapore Tourism Board
TCEI	Telangana Chamber of Event Industry
TCEB	Thailand Convention and Exhibition Bureau
TEA	Thai Exhibition Association
THA	Thai Hotel Association
TICA	Thailand Incentive and Convention Association
TMVS	Thailand MICE Venue Standard
TSA	Tourism Satellite Accounting
UFI	The Global Association of the Exhibition Industry
UIA	Union of International Associations
UNEP	United Nations Environment Programme
UNICEF	United Nations International Children's Emergency Fund

UNWTO	World Tourism Organization
VNAT	Vietnam National Administration of Tourism
VR	virtual reality
WTO	World Trade Organization
WTTC	World Travel & Tourism Council

## List of figures, tables and cases studies

### List of figures

Figure 2.1	Number of association meetings per region, 2006–2015	32
Figure 2.2	Exponential growth of association congresses among ICCA members, 1963–2012	32
Figure 5.1	Headquarters of international associations organizing meetings in India (%)	68
Figure 5.6	Number of conventions and congresses in Thailand, 2007–2015	104
Figure 7.1	Average size of association meetings in China's top-3 cities, 2006–2015	130
Figure 7.2	Number of association meetings hosted in China's top-3 cities, 2006–2015	133
Figure 7.3	China business travel, 2016–2019	136
Figure 7.4	Examples of Chinese incentive groups	139
Figure 8.1	The Republic of Korea in the global spotlight	142
Figure 8.2	Average number of participants attending meetings in the Republic of Korea, 2006–2015	146
Figure 8.3	Total number of participants at international association meetings in the Republic of Korea, 2006–2015	147

### List of tables

Table 1.1	Differences between the meetings industry and tourism	21
Table 2.1	Number of international association meetings hosted in Asia, 2006–2015	33
Table 2.2	Top-10 global association meetings by country and city, 2015	33
Table 2.3	Number of international associations hosted by country and city, 2015	34
Table 2.4	Common return on investment (ROI) indicators	36
Table 5.1	Asian governments invest in the meetings industry	63
Table 5.2	International association meetings in India, 2006–2015	69
Table 5.3	Regional industries and research in Japan's Global MICE Cities	76
Table 5.4	Comparison between the three leaders in Asia's meetings industry, 2006–2015	78
Table 6.1	Refurbishments and new convention centre developments	118
Table 7.1	Top-3 largest exhibition centres in China, July 2015	128
Table 7.2	China's top-3 cities: opportunity and threat	129
Table 7.3	Top-10 overseas destinations, 2015	135
Table 7.4	Chinese incentive market	137
Table 8.1	Convention centres in the Republic of Korea	151
Table 8.2	Regional convention bureaus and DMOs in the Republic of Korea	152
Table 8.3	Broader impacts from 7th World Water Forum	155
Table 8.4	Social media statistics from IUCN 2012	157

## List of cases studies

1.1.1	Case study: International AIDS Conference 2004 – Bringing change and progress	19
1.2.1	Case study: the role of Australian Government agencies	22
1.2.2	Case study: the meetings industry in the United Kingdom	23
1.3.1	Case study: the meetings industry in Monaco	24
2.2.2	Case study: “A Journey to Remember”	30
2.2.3	Case study: insights into incentives	30
2.4.2	Case study: approved International Fair (AIF) scheme	40
3.1.2	Case study: San Francisco Travel Association (SFTA) and Airbnb	42
3.2.1	Case study: 15th Conference of the Parties (COP 15)	43
3.3.1	Case study: Danish Meetovation	45
3.4.1	Case study: the Internet of Things (IoT)	46
3.5.1	Case study: Powered by Emotion	47
3.5.2	Case study: no cookie cutters in Sydney	47
3.8.1	Case study: managing food waste standard operating procedure (SOP)	50
6.3.1	Case study: better health prints – The Healthy Venues Award	116
6.3.2	Case study: sustaining a winning edge	117
7.3.3	Case study: Chinese community reunions and business networks	126
7.3.5	Case study: the Health Industry Summit (tHIS)	128

---

## References and bibliography

- Abel, A.** (2014), 'The 10 coolest places to visit in 2015', *Forbes*, 25-11-2014 (online), available at: [www.forbes.com](http://www.forbes.com) (11-10-2016).
- Airbnb** (2016), 'CWT adds Airbnb for Business to client offerings', press release, 12-07-2016, Airbnb (online), available at: [www.press.atairbnb.com/news/](http://www.press.atairbnb.com/news/) (09-12-2016).
- Alexander, K.** (2008), *Tsunami ready toolbox* (online), available at: [www.preventionweb.net](http://www.preventionweb.net) (10-12-2016).
- Amadeus** (2014), 'Amadeus report reveals Asia will drive a decade of sustained growth for the global travel industry', press release, 03-04-2014, Amadeus (online), available at: [www.amadeus.com](http://www.amadeus.com) (09-12-2016).
- American Express Global Business Travel** (2015), 'Managed Travel at a Turning Point: Corporate Travel Managers to Focus on Compliance and Employee Experience to Drive Wider Business Objectives', press release, 15-10-2015, American Express Global Business Travel (online), available at: [www.amexglobalbusinesstravel.com](http://www.amexglobalbusinesstravel.com) (08-12-2016).
- AMRinternational** (2016), *Globex 2016 – The global exhibitions organising market: assessment and forecast to 2020* (online), available at: [www.amrinternational.com](http://www.amrinternational.com) (10-12-2016).
- Asia Exhibition News** (2016), 'Network Global Exhibitions Market looks to Indonesia for lucrative growth opportunities', *Trade Show News Network*, 06-09-2016 (online), available at: [www.tsnn.com](http://www.tsnn.com) (10-12-2016).
- Asia News** (2016), 'Study: Hong Kong's exhibition industry generated US\$6.8 billion in 2014', *Trade Show News Network*, 23-08-2016 (online), available at: [www.tsnn.com](http://www.tsnn.com) (09-12-2016).
- ASEAN Tourism** (2015), 'Viet Nam prepares for dynamic tourism growth', press release, 31-07-2015, ASEAN Tourism (online), available at: [www.aseantourism.travel](http://www.aseantourism.travel) (11-12-2016).
- Asian Development Bank** (2016), *Asian Development Outlook 2016: Asia's Potential Growth* (online), available at: [www.adb.org](http://www.adb.org) (09-12-2016).
- Association of the German Trade Fair Industry** (2015), 'Five German exhibition companies among the Top 10 worldwide', press release, 07-09-2015, Association of the German Trade Fair Industry (online), available at: [www.auma.de/en](http://www.auma.de/en) (13-12-2016).
- Australian Minister for Trade and Investment Archives** (2014), 'Australia open for business events', press release, 28-11-2014, Australian Minister for Trade and Investment Archives (online), available at: [www.trademinister.gov.au/releases](http://www.trademinister.gov.au/releases) (08-12-2016).
- Baker, M.** (2015), 'Barclays: Airbnb usage to surpass hotel companies, but not for business travel', *Business Travel News (BTN)*, 16-01-2015 (online), available at: [www.businesstravelnews.com](http://www.businesstravelnews.com) (09-12-2016).
- Bernama** (2016), 'Malaysia's Kesatria generate 85 international convention leads with an economic impact of RM1.6 billion and 150,000 delegates', press release, 24-02-2016, Bernama (online), available at: [www.bernama.com](http://www.bernama.com) (09-12-2016).
- Bhagat, R.** (2016), *A colourful convention at Seoul* (online), available at: [www.rotarynewsonline.org](http://www.rotarynewsonline.org) (13-12-2016).
- Bigwood, G. and Luehrs, M.** (2010), *Copenhagen Sustainable Meetings Protocol: Sharing best practice and leadership strategies* (online), available at: [www.swisstourfed.ch](http://www.swisstourfed.ch) (09-12-2016).
- Business Events Sydney** (2015), 'New study finds incentive delegates to be the highest spending business event segment', press release, 25-05-2015, *Business Events Sydney* (online), available at: [www.businesseventssydney.com.au](http://www.businesseventssydney.com.au) (08-12-2016).
- Common Event Infrastructure (CEI)** (2016), 'China tops Pacific World Destination Index', *CEI*, 30-09-2016 (online), available at: [www.cei.asia](http://www.cei.asia) (12-12-2016).
- Common Event Infrastructure (CEI)** (2015), 'GBTA Foundation releases first study of China's MICE market', *CEI*, 11-11-2015 (online), available at: [www.cei.asia](http://www.cei.asia) (12-12-2016).
- Centre for Aviation (CAPA)** (n.d), 'Profile on new airports: Beijing Daxing International Airport', *Centre for Aviation (CAPA)* (online), available at: [www.centreforaviation.com](http://www.centreforaviation.com) (12-12-2016).

- Coconuts Jakarta** (2015), 'Wonderful Indonesia ranked 47th best tourism brand in the world', press release, 04-08-2015, Coconuts Jakarta (online), available at: [www.coconuts.co/jakarta](http://www.coconuts.co/jakarta) (10-12-2016).
- China Daily Europe** (2016a), 'East Chinese city constructs global cross-border e-commerce base', *China Daily Europe*, 26-01-2016 (online), available at: <http://europe.chinadaily.com.cn> (12-12-2016).
- China Daily Europe** (2016b), '10 reasons to be optimistic', *China Daily Europe*, 26-02-2016 (online), available at: <http://europe.chinadaily.com.cn> (12-12-2016).
- Chon, K.S. and Weber, K.** (2014), *Convention Tourism: International Research and Industry Perspectives*, Haworth Press, New York, p. 176.
- CIM Global** (2016), 'New e-visa for India conference delegates could be game-changer', *CIM Global*, 08-09-2016 (online), available at: [www.cimglobal.net](http://www.cimglobal.net) (09-12-2016).
- City Infrastructure Philippines** (n.d.), *City Infrastructure Philippines 2016* (online), available at: [www.cityinfra.ph](http://www.cityinfra.ph) (10-12-2016).
- Choudhury, S.R.** (2016) 'Singapore ranks third in the Global Financial Centres Index, beats Hong Kong', *CNBC*, 08-04-2015 (online), available at: [www.cnbc.com](http://www.cnbc.com) (09-12-2016).
- Colston, P.** (2016) 'Disney Business Solutions puts emotion at the heart of its MICE', *Conference & Meetings World*, 18-07-2016 (online), available at [www.c-mw.net](http://www.c-mw.net) (13-02-2017).
- Concur** (2016), 'New Concur data shows Airbnb Business is growing quickly among corporate travelers', *Concur*, 03-11-2016 (online), available at: [www.concur.com/newsroom](http://www.concur.com/newsroom) (09-12-2016).
- Creative Travel** (n.d), 'Creative Travel India wins SITE Crystal Award for Excellence in Incentive Travel', press release, *Creative Travel* (online), available at: [www.travel2india.com](http://www.travel2india.com) (08-12-2016).
- Daily News** (2016), 'France very important contributor to tourist arrivals', *Daily News*, 03-11-2016 (online), available at: [www.dailynews.lk](http://www.dailynews.lk) (11-12-2016).
- Destination Marketing Association International** (n.d.), 'A Road Map for the Future', Destination Marketing Association International (online), available at: [www.destinationmarketing.org/destinationnext](http://www.destinationmarketing.org/destinationnext) (10-12-2016).
- Embassy of the Republic of Indonesia** (2016), 'Tourism Minister: 10.4 million foreign visitors arrivals in 2015: Indonesia exceeds target', press release, 08-02-2016, Embassy of the Republic of Indonesia (online), available at: [www.embassyofindonesia.org](http://www.embassyofindonesia.org) (10-12-2016).
- Eventoplus.com** (2016), 'Rajeev Kohli talks about the Incentive Trip', *Eventoplus.com*, 24-11-2016 (online), available at: [www.eventoplus.com](http://www.eventoplus.com) (09-12-2016).
- ETB Travel News** (2016), 'A decade of success – the Sarawak Convention Bureau's 10th Anniversary', *ETB Travel News*, 08-11-2016 (online), available at: [www.etbtravelnews.global](http://www.etbtravelnews.global) (12-12-2016).
- Exhibition World** (2016), 'UFI's latest Global Barometer Survey reflects global expo optimism', *Exhibition World*, 03-02-2016 (online), available at: [www.exhibitionworld.co.uk](http://www.exhibitionworld.co.uk) (08-12-2016).
- Exhibitor Online** (2016), 'AMR International Releases Globex 2016 Forecast', *Exhibitor Online*, 09-08-2016 (online), available at: [www.exhibitoronline.com/news](http://www.exhibitoronline.com/news) (08-12-2016).
- Feiyue, Y.** (2016a), 'China-Thai agreement targets MICE business', *China Daily USA*, 30-05-2016 (online), available at: <http://usa.chinadaily.com.cn> (12-12-2016).
- Feiyue, Y.** (2016b), 'Laying down the welcome mat', *China Daily Asia Weekly*, 29-01-2016 (online), available at: <http://epaper.chinadailyasia.com> (12-12-2016).
- Foley, C. et al.** (2015), 'Asian incentive events in New South Wales: Expenditure and retail impact', *Business Events Sydney* (online), available at: [www.businesseventssydney.com.au](http://www.businesseventssydney.com.au) (08-12-2016).
- Future Convention Cities Initiative (FCCI)** (2014), *Beyond Tourism Benefits: Building an International Profile* (online), available at: [www.fccinitiative.org](http://www.fccinitiative.org) (08-12-2016).
- Future Ready Singapore** (n.d.), *International Non-Profit Organisations* (online), available at: [www.edb.gov.sg](http://www.edb.gov.sg) (12-12-2016).
- Gell, M.** (2016), 'Japan invests in major event infrastructure', *CEI*, 15-08-2016 (online), available at: [www.cei.asia](http://www.cei.asia) (10-12-2016).
- Global Business Travel Association Foundation** (2016a), 'China takes place as leading market in global business travel spend as India becomes fastest growing business travel market', press release, 11-07-2016, *Global Business Travel Association Foundation* (online), available at: [www.gbta.org/foundation](http://www.gbta.org/foundation) (09-12-2016).
- Global Business Travel Association Foundation** (2016b), 'Global Business Travel Spend Topped Record-Breaking \$1.2 Trillion USD in 2015, Will Reach \$1.6 Trillion by 2020', press release, 11-07-2016, *Global Business Travel Association Foundation* (online), available at: [www.gbta.org/foundation](http://www.gbta.org/foundation) (08-12-2016).
- Global Business Travel Association Foundation** (2016c), 'India poised to be top six business travel market by 2019', press release, 13-07-2016, *Global Business Travel Association Foundation* (online), available at: [www.gbta.org/foundation](http://www.gbta.org/foundation) (09-12-2016).



- Global Ready China News** (2016), 'Outbound Chinese MICE market set to reach USD 800 million by 2020', *Global Ready China News*, 03-02-2016 (online), available at: [www.china.globalready.news](http://www.china.globalready.news) (12-12-2016).
- Global Science & Convention Alliance** (n.d.), *Global Science & Convention Alliance – About* (online), available at: [www.globalsciencealliance.com](http://www.globalsciencealliance.com) (10-12-2016).
- Government of Hong Kong** (2016), *Hong Kong: The Facts – Tourism* (online), available at: [www.gov.hk/en](http://www.gov.hk/en) (09-12-2016).
- Greenview** (2016), *Green Venue Survey and Report: The State of Convention and Exhibition Center Sustainability* (online), available at: [www.greenvenuereport.com](http://www.greenvenuereport.com) (11-12-2016).
- Hall, T.** (2016), 'Global Snapshot', *Exhibition World*, 12-05-2016 (online), available at: [www.exhibitionworld.co.uk](http://www.exhibitionworld.co.uk) (08-12-2016).
- Hales, M. et al.** (2016), *Global Cities 2016, A.T. Kearney* (online), available at: [www.atkearney.com](http://www.atkearney.com) (12-12-2016).
- Hong Kong Trade Development Corporation Research** (2016), 'Convention and Exhibition Industry in Hong Kong', *Hong Kong Trade Development Corporation Research*, 13-04-2016 (online), available at: [www.research.hktcdc.com](http://www.research.hktcdc.com) (09-12-2016).
- Hotel News Resource** (2016), 'China accounts for nearly 25% of global business travel spending', *Hotel News Resource*, 31-10-2016 (online), available at: [www.hotelnewsresource.com](http://www.hotelnewsresource.com) (12-12-2016).
- Hudoyo, M.** (2016), 'Bigger budget, more challenging targets for Indonesia MICE', *TTG Asia*, 06-04-2016 (online), available at: [www.ttgasia.com](http://www.ttgasia.com) (10-12-2016).
- Incentives, Business Travel and Meetings Expo China** (2014), 'Price and a match to business interests emerge as key factors', press release, 06-10-2014, IBTM China (online), available at: [www.cibtm.com](http://www.cibtm.com) (12-12-2016).
- International AIDS Society – IAS** (2004), *Report on the XV International AIDS Conference Bangkok, Thailand, 11–16 July 2004* (online), available at: [www.iasociety.org](http://www.iasociety.org) (08-12-2016).
- International Association of Convention Centres – AIPC** (2016), *2016 Member Survey: Diversification and Adaptation* (online), available at: [www.aipc.org](http://www.aipc.org) (11-12-2016).
- International Association of Exhibitions and Events – IAEE** (2016), 'IAEE and ESCA support new industry wide security initiative', press release, 28-07-2016, International Association of Exhibitions and Events (online), available at: [www.iaee.com](http://www.iaee.com) (11-12-2016).
- International Congress and Convention Association – ICCA** (2016a), *2015 ICCA Statistics Report* (online), available at: [www.iccaworld.org/knowledge](http://www.iccaworld.org/knowledge) (08-12-2016).
- International Congress and Convention Association – ICCA** (n.d.), *ICCA Data* (online), available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (19-07-2016).
- International Congress and Convention Association – ICCA** (n.d.), *Association Database*, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (05-08-2016).
- International Congress and Convention Association – ICCA** (n.d.), *ICCA Destination Comparison Report*, available to ICCA members with password login at: [www.iccaworld.org](http://www.iccaworld.org) (19-07-2016).
- International Congress and Convention Association – ICCA** (2016b), *The International Association Meetings Market 2015* (online), available at: [www.iccaworld.org/news](http://www.iccaworld.org/news) (10-12-2016).
- International Congress and Convention Association – ICCA** (2013), *A modern history of the international meetings industry*, press release, 17-09-2013, International Congress and Convention Association (online), available at: [www.iccaworld.org](http://www.iccaworld.org) (08-12-2016).
- International Monetary Fund – IMF** (2016), 'IMF Survey: Sri Lanka to reboot economic policies', 14-06-2016 (online), available at: [www.imf.org](http://www.imf.org) (11-12-2016).
- IUCN World Conservation Congress** (2013), *Highlights of the 2012 IUCN World Conservation Congress* (online), available at: [www.iucn.org](http://www.iucn.org) (13-12-2016).
- IUCN World Conservation Congress** (2012), *Congress archives: 2012 World Conservation Congress, Jeju, Republic of Korea* (online), available at: [www.2012congress.iucn.org](http://www.2012congress.iucn.org) (13-12-2016).
- Jamrisko, M. and Lu, W.** (2016), 'These are the world's most innovative economies', *Bloomberg Markets*, 19-01-2016 (online), available at: [www.bloomberg.com](http://www.bloomberg.com) (13-12-2016).
- Jaruzelski, B. et al.** (2015), *The 2015 Global Innovation 1000: Innovation's new world order* (online), available at: [www.strategyand.pwc.com](http://www.strategyand.pwc.com) (08-12-2016).
- Jing, M. and Zhuoqiong, W.** (2016), 'Melding clicks and bricks', *China Daily Asia Weekly*, 11-03-2016 (online), available at: <http://epaper.chinadailyasia.com> (12-12-2016).
- Khan, M.** (2016), 'Growth star India overtakes China as world's fastest growing major economy', *The Telegraph*, 08-02-2016 (online), available at: [www.telegraph.co.uk](http://www.telegraph.co.uk) (09-12-2016).
- Kim, J.K.** (2016), 'ASEAN seeks Korean role in economic integration', *The Korea Times*, 27-07-2016 (online), available at: [www.koreatimes.co.kr](http://www.koreatimes.co.kr) (13-12-2016).

- Kim, H.J.** (2016), 'S. Korea releases comprehensive strategy on bio industry', *Yonhap News Agency*, 08-09-2016 (online), available at: [www.english.yonhapnews.co.kr](http://www.english.yonhapnews.co.kr) (13-12-2016).
- Koumelis, T.** (2016), 'China outbound wave dominates tourist arrivals across Asia Pacific to 2020', *Travel Daily News*, 12-05-2016 (online), available at: [www.traveldailynews.asia](http://www.traveldailynews.asia) (12-12-2016).
- Kotelawala, H.** (2015), 'Unprecedented growth in MICE', *Daily Financial Times*, 22-07-2015 (online), available at: [www.ft.lk](http://www.ft.lk) (24-04-2016).
- Korea Tourism Organization** (2016), 'Korea inbound tourism projected to grow by 20% in 2016', *Union of International Associations*, 04-08-2016 (online), available at: [www.uia.org](http://www.uia.org) (13-12-2016).
- Kuncinas, P.** (2016), 'Sri Lanka Economy Infographic 2016: Island of Opportunity', blog, 16-05-2016, *Oxford Business Group* (online), available at: [www.oxfordbusinessgroup.com](http://www.oxfordbusinessgroup.com) (11-12-2016).
- Lee, C.** (2015), 'Markets of the Future: ASEAN in 2020', *Euromonitor International* (online), available at: [www.vietbeautyshow.com](http://www.vietbeautyshow.com) (11-12-2016).
- Lee, P.Q.P.** (2016), 'Meeting venues need to keep up with the times: PCMA', *TTGmice*, 29-07-2016 (online), available at: [www.ttg mice.com](http://www.ttg mice.com) (11-12-2016).
- Lei, Z.** (2016), 'China to sink billions into new airports this year', *China Daily*, 11-01-2016 (online), available at: [www.chinadaily.com.cn](http://www.chinadaily.com.cn) (12-12-2016).
- Lui, P.** (2016a), 'CSR activities, unique stays top Chinese incentive requirements', *TTG Asia*, 07-04-2016 (online), available at: [www.ttg asia.com](http://www.ttg asia.com) (12-12-2016).
- Lui, P.** (2016b), 'More events as Chinese associations gain independence', *TTG Asia*, 11-04-2016 (online), available at: [www.ttg asia.com](http://www.ttg asia.com) (12-12-2016).
- Lui, P.** (2016c), 'Taiwan gets future-ready', *TTGmice*, 11-2016 (online), available at: [www.ttg mice.com](http://www.ttg mice.com) (11-12-2016).
- Lui, P.** (2014), 'Vying for recognition', *TTG Associations*, April 2014 issue, p. 36.
- Luna, R.** (2015), *Meet Meetovation* (online), available at: [www.mpiweb.org](http://www.mpiweb.org) (09-12-2016).
- Macao Trade and Investment Promotion Institute** (n.d.), *The Incentive Measures* (online), available at: [www.ipim.gov.mo](http://www.ipim.gov.mo) (10-12-2016).
- Macao Trade and Investment Promotion Institute** (n.d.), *Market Information* (online), available at: [www.ipim.gov.mo](http://www.ipim.gov.mo) (10-12-2016).
- Macao Trade and Investment Promotion Institute (IPIM)** media conference during AIME, Melbourne, 11-02-2016.
- Magnier, M.** (2016), 'China's economic growth in 2015 is slowest in 25 years', *The Wall Street Journal*, 19-01-2016 (online), available at: [www.wsj.com/articles](http://www.wsj.com/articles) (11-12-2016).
- Malaysia Convention and Exhibition Bureau** (2016a), 'Malaysia Association Next (MyneXt) event provides a catalyst for collaboration', press release, 27-10-2016, Malaysia Convention and Exhibition Bureau (online), available at: [www.myceb.com.my](http://www.myceb.com.my) (10-12-2016).
- Malaysia Convention and Exhibition Bureau** (2016b), 'Success by Design', *Annual Report 2015*, p. 5.
- Malaysia Convention and Exhibition Bureau** (2012), 'Kesatrias appointed to boost Malaysia's business events industry', press release, 19-01-2012, Tourism Malaysia (online), available at: [www.tourism.gov.my](http://www.tourism.gov.my) (10-12-2016).
- Malaysian Association of Convention and Exhibition Organisers and Suppliers** (2015), 'What's new with MACEOS', newsletter, 03-06 2015, MACEOS (online), available at: [www.maceos.com.my](http://www.maceos.com.my) (10-12-2016).
- Manolis** (2011), 'Business events offer more to destinations than tourism dollars alone', *Toposophy*, 17-10-2011 (online), available at: [www.abouttourism.wordpress.com](http://www.abouttourism.wordpress.com) (08-12-2016).
- Marina Bay Sands** (n.d.), *Sands ECO360 Green Meetings* (online), available at: [www.marinabaysands.com](http://www.marinabaysands.com) (12-12-2016).
- Mahrotri, P.T.** (2016), 'Watch out Singapore, Hong Kong: Shanghai top pick to become next financial hub', *Bloomberg Markets*, 27-09-2016 (online), available at: [www.bloomberg.com](http://www.bloomberg.com) (12-12-2016).
- MCI Building Community** (2016), 'Global Destination Sustainability Index releases first ever city ranking', press release, 17-11-2016, MCI Building Community (online), available at: [www.mci-group.com](http://www.mci-group.com) (15-12-2016).
- Mckenzie, S.** (2012) 'Monaco: Land of super yachts, super casinos and super rich', *CNN*, 03-09-2012 (online), available at: [www.edition.cnn.com](http://www.edition.cnn.com) (08-12-2016).
- Meeting & Incentive Travel India** (2016), *How the Middle East can grow in stature* (online), available at: [www.meetbizindia.com](http://www.meetbizindia.com) (09-12-2016).
- Meet Taiwan** (n.d.), *Asia Super Team: The Almighty Player* (online), available at: [www.asiasuperteam.meettaiwan.com](http://www.asiasuperteam.meettaiwan.com) (09-12-2016).
- Meeting Professionals International** (n.d.), *Strategic Meetings Management Research* (online), available at: [www.mpiweb.org](http://www.mpiweb.org) (09-12-2016).
- Meetpie** (2016a), 'Australia has 157 international meetings in bid pipeline' (online), available at: [www.meetpie.com](http://www.meetpie.com) (08-12-2016).

- Meetpie** (2016b), 'Room blocks "a thing of the past" as Airbnb bites' (online), available at: [www.meetpie.com](http://www.meetpie.com) (08-12-2016).
- Meetpie** (2013), 'Doctors meet local parents at first "Coffee Shop Conference"' (online), available at: [www.meetpie.com](http://www.meetpie.com) (08-12-2016).
- Ministry of Foreign Affairs Singapore** (2014), 'Channel News Asia: Singapore retains top spot in EIU Business Environment Rankings' (online), available at: [www.mfa.gov.sg](http://www.mfa.gov.sg) (12-12-2016).
- Ministry of Tourism and Creative Economy Indonesia** (2014), 'MICE: A New Paradigm for Tourism' (online), available at: [www.asiapacific.unwto.org](http://www.asiapacific.unwto.org) (10-12-2016).
- Ming, C.P.** (2016), 'Singapore ranks 2nd in ease of doing business', *The Business Times*, 27-10-2016 (online), available at: [www.businesstimes.com.sg](http://www.businesstimes.com.sg) (12-12-2016).
- MSLGroup** (2015), *MSLGroup in Asia wins 26 Steview Awards at the 12th International Business Awards* (online), available at: [www.asia.mslgroup.com](http://www.asia.mslgroup.com) (09-12-2016).
- Mullan, C.** (2015), 'fDi's Asia Pacific Cities of the Future 2015/16: the winners', *fDiIntelligence*, 07-12-2015 (online), available at: [www.fdiintelligence.com](http://www.fdiintelligence.com) (10-12-2016).
- Nagata, K.** (2016), 'Japan ranked most popular spot for international conferences in Asia for fourth consecutive year', *The Japan Times*, 02-06-2016 (online), available at: [www.japantimes.co.jp](http://www.japantimes.co.jp) (10-12-2016).
- Naito, H.** (2016), 'Japan doubles goal to 40 million foreign tourists in 2020', *The Asahi Shimbun*, 31-10-2016 (online), available at: [www.asahi.com](http://www.asahi.com) (10-12-2016).
- Oates, G.** (2012), 'Monaco: A Destination to go Beyond Yourself', *prevue*, 14-11-2012 (online), available at: [www.prevuemeetings.com](http://www.prevuemeetings.com) (08-12-2016).
- Organisation for Economic Co-operation and Development** (2016), 'Main Science and Technology Indicators', OECD (online), available at: [www.oecd.org](http://www.oecd.org) (13-12-2016).
- Organisation of Economic Co-operation and Development** (2014b), *OECD Economic Surveys Korea* (online), available at: [www.oecd.org](http://www.oecd.org) (13-12-2016).
- Organisation for Economic Co-operation and Development** (2014a), 'Korea', *OECD Tourism Trends and Policies 2014*, OECD, pp. 228–234.
- Oschabnig, K.** (2016), 'Velo-city Global 2016 – Evolution of Cycling', bike citizens, 15-02-2016 (online), available at: [www.bikecitizens.net](http://www.bikecitizens.net) (11-12-2016).
- Oxford Business Group** (2016), 'Philippines in bid to boost FDI', Oxford Business Group, 26-07-2016 (online), available at: [www.oxfordbusinessgroup.com](http://www.oxfordbusinessgroup.com) (10-12-2016).
- Pacific World** (2016), 'Pacific World global Destination Index report identifies Thailand, Indonesia and Singapore as Top Destinations for meetings and incentives in Asia', Pacific World, 10-02-2016 (online), available at: [www.pacificworld.com](http://www.pacificworld.com) (10-12-2016).
- Panda, A.** (2016), 'India takes over from China as Top Global FDI destination in 2015', *The Diplomat*, 25-04-2016 (online), available at: [www.thediplomat.com](http://www.thediplomat.com) (09-12-2016).
- Park, H.K.** (2016), 'Korea as a global tourism destination', *The Korea Times*, 19-04-2016 (online), available at: [www.koreatimes.co.kr](http://www.koreatimes.co.kr) (13-12-2016).
- Parrocha, A.N.** (2015), 'Tourism 2016 budget up by 44% to Php3.61B', *Balita*, 23-12-2015 (online), available at: [www.balita.ph](http://www.balita.ph) (12-12-2016).
- Perry, A.** (2016), 'Zenvoy successfully helping IMEX attendees to make most of networking – in advance', *Event Industry News*, 26-10-2016 (online), available at: [www.eventindustrynews.com](http://www.eventindustrynews.com) (09-12-2016).
- Ran, Y.** (2016) 'Foreign tourists violating visa-free policy', *China Daily*, 10-08-2016 (online), available at: [www.chinadaily.com.cn](http://www.chinadaily.com.cn) (12-12-2016).
- Reed Exhibitions** (2015), 'World's largest healthcare event opens to record breaking crowds in Shanghai', press release, 01-05-2015, Reed Exhibitions (online), available at: [www.reedexpo.com](http://www.reedexpo.com) (12-12-2016).
- Ryan, O.** (2015), 'Letter from the Executive Director', blog, 18-07-2015, International AIDS Society (online), available at: [www.iasociety.org](http://www.iasociety.org) (08-12-2016).
- Runcie, A.** (2015), 'India direct flights back in the mix', *The Phnom Penh Post*, 04-09-2015 (online), available at: [www.phnompenhpost.com](http://www.phnompenhpost.com) (11-12-2016).
- San Francisco Travel** (2016), *San Francisco Travel reports record-breaking year for tourism* (online), available at: [www.sfttravel.com](http://www.sfttravel.com) (09-12-2016).
- Schwab, K. et al.** (2016), *The Global Competitiveness Report 2015–2016*, World Economic Forum, Geneva, preface xv.
- Scottish Event Campus** (2016), 'SECC becomes world's first official "Healthy Venue"', SEC (online), available at: [www.sec.co.uk](http://www.sec.co.uk) (11-12-2016).
- Scott, M.** (2016), 'AccorHotels of France Buys Onefinestay for \$169 Million', *The New York Times*, 05-04-2016 (online), available at: [www.nytimes.com](http://www.nytimes.com) (09-12-2016).
- Shainesh, G. et al.** (n.d.), 'India as a Global Conventions Destination: Prospects & Strategies', Indian Institute of Management Bangalore and India Convention Promotion Bureau.

- Shanghai Municipal Tourism Administration** (n.d.), 'Recommended PCOs and DMCs' (online), available at: [www.meet-in-shanghai.net](http://www.meet-in-shanghai.net) (12-12-2016).
- Singapore Association of Convention and Exhibition Organisers and Suppliers** (n.d.), 'About SACEOS' (online), available at: [www.saceos.org.sg](http://www.saceos.org.sg) (09-12-2016).
- Singapore Economic Development Board** (n.d.), 'Industries', *Future Ready Singapore* (online), available at: [www.edb.gov.sg](http://www.edb.gov.sg) (11-12-2016).
- Singapore Tourism Board** (2014), 'Approved International Fair' (online), available at: [www.stb.gov.sg](http://www.stb.gov.sg) (02-02-2017).
- Singapore Tourism Board** (2015), 'Singapore Experience Awards 2015: 27 outstanding individuals and organisations honoured, Annex A – The Singapore Experience Awards 2015 Finalists and Recipients', media release, 21-10-2015, Singapore Tourism Board (online), available at: [www.stb.gov.sg](http://www.stb.gov.sg) (09-12-2016).
- Singapore Tourism Board** (n.d.), *Sustainability Guidelines for the Singapore MICE Industry*.
- Society for Incentive Travel Excellence Foundation** (2014), *Incentives Move Business: An Untouched Opportunity for Incentive Travel Providers – A White Paper from the SITE Foundation*, SITE (online), available at: [www.siteglobal.com](http://www.siteglobal.com) (08-12-2016).
- Society for Incentive Travel Excellence** (n.d.), *2015 SITE Crystal Award Recipient for Most Effective Incentive Marketing Campaign*, SITE (online), available at: [www.siteglobal.com](http://www.siteglobal.com) (09-12-2016).
- Sohn, J.Y.** (2016), 'Korea aims to become global bio-health leader', *The Korea Herald*, 30-03-2016 (online), available at: [www.koreaherald.com](http://www.koreaherald.com) (13-12-2016).
- Tang, A.** (2015), 'Thailand could stop thousands of HIV deaths with more tests and treatment: experts', Reuters (online), available at: [www.reuters.com](http://www.reuters.com) (08-12-2016).
- Taplin, N. et al.** (2016), 'China's yuan joins elite club of IMF reserve currencies', Reuters (online), available at: [www.reuters.com](http://www.reuters.com) (11-12-2016).
- Telangana Tourism** (n.d.), 'Happening Hyderabad' (online), available at: [www.telanganatourism.gov.in](http://www.telanganatourism.gov.in) (09-12-2016).
- Thailand Convention and Exhibition Bureau** (2015), 'TCEB Celebrates Success of Thailand MICE Venue Standard', press release, 29-01-2015, Thailand Convention & Exhibition Bureau (online), available at: [www.tceb.or.th](http://www.tceb.or.th) (24-04-2017).
- Thailand Convention and Exhibition Bureau** (2014a), *MICE Capabilities: MICE Standards* (online), available at: [www.businesseventsthailand.com](http://www.businesseventsthailand.com) (09-12-2016).
- Thailand Convention and Exhibition Bureau** (2014b), *MICE Capabilities: Overview* (online), available at: [www.businesseventsthailand.com](http://www.businesseventsthailand.com) (12-12-2016).
- The 7th World Water Forum 2015** (n.d.), *Forum Outcomes* (online), available at: [www.worldwaterforum7.org](http://www.worldwaterforum7.org) (13-12-2016).
- The Global Association of the Exhibition Industry** (2016a), *The Trade Fair Industry in Asia*, UFI [electronic], 12, pp. 21 and 81, available at: [www.ufi.org](http://www.ufi.org) (10-12-2016).
- The Global Association of the Exhibition Industry** (2016b), 'UFI releases new report on the Trade Fair Industry in Asia', press release, 21-07-2016, UFI (online), available at: [www.ufi.org](http://www.ufi.org) (09-12-2016).
- The Global Association of the Exhibition Industry** (2015), *The Trade Fair Industry in Asia*, UFI [electronic], 11, p. 102, available at: [www.ufi.org](http://www.ufi.org) (10-12-2016).
- The Meeting Magazines** (2014), 'Middle East is fastest growing international meetings market', *The Meeting Magazines*, 25-03-2014 (online), available at: [www.themeetingmagazines.com](http://www.themeetingmagazines.com) (09-12-2016).
- The Star Online** (2016), 'Vietnam sees 2016 GDP growth slowing to 6.3%', *The Star*, 09-12-2016 (online), available at: [www.thestar.com.my](http://www.thestar.com.my) (11-12-2016).
- The Worldwide Exhibition for Incentive Travel, Meetings and Events** (2016), 'IMEX Group Sharing economy survey reveals differing views among meetings industry around the world', IMEX, 20-04-2016 (online), available at: [www.imex-frankfurt.com](http://www.imex-frankfurt.com) (09-12-2016).
- Times Online** (2016), 'Sri Lanka to abolish minimum hotel room rates next year', 28-07-2016, *Times Online* (online), available at: [www.sundaytimes.lk](http://www.sundaytimes.lk) (11-12-2016).
- Tourism Australia** (2016), *China Market Profile 2016*, Tourism Australia (online), available at: [www.tourism.australia.com](http://www.tourism.australia.com) (12-12-2016).
- Tourism Promotions Board Philippines** (2015), *Directory of associations based in the Philippines*, Tourism Promotions Board Philippines (online), available at: [www.tpb.gov.ph](http://www.tpb.gov.ph) (10-12-2016).
- TTG Asia** (2016a), 'China becomes the world's biggest travel market', *TTG Asia*, 26-04-2016 (online), available at: [www.ttgasia.com](http://www.ttgasia.com) (11-12-2016).
- TTG Asia** (2016b), 'China outbound show slowest growth since 1997', *TTG Asia*, 31-05-2016 (online), available at: <http://ttgasia.com> (12-12-2016).
- Yue, K.** (2014), *Food for thought*, November 2014, TTTG mice (online), available at: [www.ttg mice.com](http://www.ttg mice.com) (09-12-2016).
- UBM India** (2016), 'UBM India announces the 4th edition of Concrete Show India', media release, 26-04-2016, UBM India (online), available at: [www.ubmindia.in](http://www.ubmindia.in) (09-12-2016).



- Viet Nam National Administration of Tourism** (2016), 'Viet Nam becomes global destination thanks to ASEAN integration', Ministry of Culture, Sports and Tourism, 16-02-2016 (online), (13-12-2016).
- Visit Denmark** (n.d), *International Meetovation Training Programme* (online), available at: [www.visitdenmark.com](http://www.visitdenmark.com) (09-12-2016).
- VisitBritain** (n.d), 'VisitBritain has launched a programme to attract more global business events to the UK' (online), available at: [www.visitbritain.org](http://www.visitbritain.org) (08-12-2016).
- Wei, H.** (2014), 'Shanghai becomes Asia's most stylish city', *China Daily USA*, 10-02-2014 (online), available at: [www.usa.chinadaily.com.cn](http://www.usa.chinadaily.com.cn) (12-12-2016).
- Whiteling, I.** (2010), 'Copenhagen Sustainable Meetings Protocol launches on World Earth Day', 28-04-2010, *International Meetings Review* (online), available at: [www.internationalmeetingsreview.com](http://www.internationalmeetingsreview.com) (09-12-2016).
- Wong, S. and Palmeri, C.** (2015), 'Macau bets \$27 billion it can lure more gamblers', *Bloomberg*, 18-05-2015 (online), available at: [www.bloomberg.com](http://www.bloomberg.com) (10-12-2016).
- Woollacott, E.** (2016), 'Smart data gets hotel guests coming back', *Raconteur*, 22-09-2016 (online), available at: [www.raconteur.net](http://www.raconteur.net) (09-12-2016).
- World Obesity Federation** (n.d), *Healthy Venues Accreditation*, World Obesity Federation (online), available at: [www.worldobesity.org](http://www.worldobesity.org) (11-12-2016).
- World Tourism Organization** (2017), *Contribution of Islamic Culture and its Impact on the Asian Tourism Market*, UNWTO, Madrid.
- World Tourism Organization** (2016a), 'International tourist arrivals up 4% reach a record 1.2 billion in 2015', press release, 18-02-2016, UNWTO (online), available at: [www.media.unwto.org](http://www.media.unwto.org) (12-12-2016).
- World Tourism Organization** (2016b), *UNWTO Tourism Highlights, 2016 Edition*, UNWTO, Madrid, p. 4.
- World Tourism Organization** (2015a), *The Decision-making Process of Meetings, Congresses, Conventions and Incentives Organizers*, UNWTO, Madrid.
- World Tourism Organization** (2015b), *UNWTO Tourism Highlights, 2015 Edition*, UNWTO, Madrid, p. 5.
- World Tourism Organization** (2012), *MICE Industry – An Asia-Pacific Perspective*, UNWTO, Madrid.
- World Tourism Organization** (2006), *Measuring the Economic Importance of the Meetings Industry – Developing a TSA Extension*, UNWTO, Madrid.
- World Travel & Tourism Council** (2016), 'Chinese outbound travel continues to soar but inbound potential remains untapped', press release, 21-03-2016, WTTC (online), available at: [www.wttc.org](http://www.wttc.org) (12-12-2016).
- Yanzi, D.** (2015), 'South Korea a quality MICE destination', *China Daily Asia*, 30-04-2015 (online), available at: [www.chinadailyasia.com](http://www.chinadailyasia.com) (13-12-2016).
- Yeo, L.** (2016), 'Sharpening our strategies towards Quality Tourism', *Singapore Tourism Board*, 26-04-2016 (online), available at: [www.stb.gov.sg](http://www.stb.gov.sg) (10-12-2016).
- Yin, C.** (2016), 'New law adopted on overseas NGOs', *China Daily*, 29-04-2016 (online), available at: [www.chinadaily.com.cn](http://www.chinadaily.com.cn) (12-12-2016).
- Yuan, G.** (2015), 'Cities at the cutting edge', *China Daily Asia Weekly*, 11-09-2015 (online), available at: [www.epaper.chinadailyasia.com](http://www.epaper.chinadailyasia.com) (12-12-2016).
- Yue, K.** (2012), 'Over coffee with Corinne Janssen', *TTGmice*, September 2012 (online), available at: [www.ttg mice.com](http://www.ttg mice.com) (10-12-2016).
- Yue, Z.** (2016), 'Shanghai set for huge science role within three years', *China Daily USA*, 31-03-2016 (online), available at: [www.usa.chinadaily.com.cn](http://www.usa.chinadaily.com.cn) (12-12-2016).
- Zhou, S.** (2016) 'Inbound tourists, once marginal, now golden', *China Daily*, 20-05-2016 (online), available at: [www.chinadaily.com.cn](http://www.chinadaily.com.cn) (12-12-2016).
- Zhuang, J. and Wignaraja, G.** (2016), 'Asia growth pessimism is not warranted', 29-05-2016, *OECD Insights*, OECD (online), available at: [www.oecdinsights.org](http://www.oecdinsights.org) (09-12-2016).

**Websites:****Destination Marketing Association International (DMAI)**

[www.destinationmarketing.org](http://www.destinationmarketing.org)

**Exhibition World**

[www.exhibitionworld.co.uk/](http://www.exhibitionworld.co.uk/)

**Exhibitor Online**

[www.exhibitoronline.com/](http://www.exhibitoronline.com/)

**Future Convention Cities Initiative**

[www.fccinitiative.org](http://www.fccinitiative.org)

**Global Business Travel Association**

[www.gbta.org](http://www.gbta.org)

**Global Science and Convention Alliance**

[www.globalsciencealliance.com](http://www.globalsciencealliance.com)

**Hotel News Resource**

[www.hotelnewsresource.com](http://www.hotelnewsresource.com)

**International Association of Convention Centres (AIPC)**

[www.aipc.org](http://www.aipc.org)

**International Association of Exhibitions and Events (IAEE)**

[www.iaee.com](http://www.iaee.com)

**International Congress and Convention Association (ICCA)**

[www.iccaworld.com](http://www.iccaworld.com)

**International Monetary Fund (IMF)**

[www.imf.org](http://www.imf.org)

**Meeting Professionals International (MPI)**

[www.mpiweb.org](http://www.mpiweb.org)

**Organisation for Economic Co-operation and Development (OECD)**

[www.oecd.org](http://www.oecd.org)

**PreventionWeb**

[www.preventionweb.net](http://www.preventionweb.net)

**The Global Association of the Exhibition Industry (UFI)**

[www.ufi.org](http://www.ufi.org)

**The Global Association of the Exhibition Industry**

[www.ufi.org](http://www.ufi.org)

**Trade Show News Network (TSNN)**

[www.tsnn.com](http://www.tsnn.com)

**Union of International Associations (UIA)**

[www.uia.org](http://www.uia.org)

**World Economic Forum (WEF)**

[www.weforum.org](http://www.weforum.org)

**World Tourism Organization (UNWTO)**

[www.untwo.org](http://www.untwo.org)

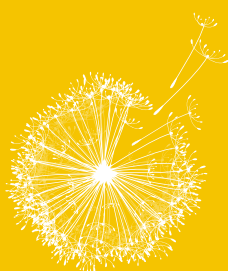
**World Travel & Tourism Council (WTTC)**

[www.wttc.org](http://www.wttc.org)





The **World Tourism Organization (UNWTO)**, a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 156 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.



**2017**  
**INTERNATIONAL YEAR**  
**OF SUSTAINABLE TOURISM**  
**FOR DEVELOPMENT**