Business Tourism Briefing

An Overview of the UK's Business Tourism Industry

"Business tourism is one of the most lucrative, yet least well acknowledged components of our tourist industry."

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Business Tourism Partnership

Price: £25.00

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This Briefing has been compiled by Tony Rogers (BACD and ABPCO) on behalf of the Business Tourism Partnership, and includes contributions from many Partnership members.

FOREWORD

Leading the way........

The UK's business tourism is a success story. Its importance can no longer be undervalued.

This briefing is one of a number of initiatives, undertaken by the Business Tourism Partnership, to position the sector at the forefront of thinking by both the Government and the wider business community. It provides a greater understanding of the scope and characteristics of its various segments. Business tourism also offers stimulating and rewarding careers. Details on these opportunities and how to access them are also included.

Conferences, exhibitions, incentive travel, corporate hospitality, outdoor events and individual business travel account for a growing share of total inbound tourism into the UK. In 2001, for the first time ever, expenditure by business visitors exceeded that of leisure visitors, representing 31.7% of all spend compared with 29% of spend by holiday visitors. The British Tourist Authority projects that, by 2010, expenditure by business visitors could represent as much as 45% of total inbound tourism spend. In total the sector is estimated to be worth in excess of £16 billion.

The sector also contributes to developing trade through the showcasing of the UK's products and services, often facilitating exports and inward investment, as well as gathering information, furthering knowledge and enabling productive networking. Attendees at events can also be encouraged to spend more by experiencing the UK's varied leisure offerings.

The UK has many unique advantages as a business tourism destination, but it also faces a number of challenges which could undermine its position as one of the leading countries in this highly competitive, international marketplace. Many of these issues are detailed in this booklet.

To remain competitive, the UK's business tourism industry must continue to provide a good balance of high quality facilities and services which are effectively marketed to key national and international audiences.

Given proper recognition and support, as well as ongoing investment, the sector will lead the way to sustainable, high quality growth for both UK trade and tourism.

Michael Hirst
Chair
Business Tourism Partnership

January 2003

1. AN OVERVIEW OF THE BUSINESS TOURISM SECTOR

Business tourism is a sector of the wider tourism industry. It encompasses:

1. **conferences and meetings** (estimated to be worth £7.3 billion annually by the *British Conference Market Trends Survey 2001.* This figure represents an increase of some 10% on the previous figure of £6.6 billion for 2000, quoted in the 'BTP Manifesto'. In part this may be due to a change in methodology, in part to the substantially greater sample size, and hence more representative findings, for the 2001 research. The estimate will be monitored on an annual basis, with updated figures included in the re-named 'British Conference Venues Survey'.)
2. **exhibitions and trade fairs** (estimated to be worth £2.04 billion annually) Exhibitions are the 5th largest marketing medium attracting 11% of media expenditure in the UK. This figure does not include the value of business transacted at exhibitions
3. **incentive travel** (1996 research, the latest available, estimated the inbound incentive travel market to be worth £165 million annually)
4. **corporate events** (estimates value this segment at between £700 million and £1billion annually)
5. **outdoor events** (estimated value of at least £1billion annually)
6. **business (or individual corporate) travel**. No reliable estimates of this segment exist, although *Business Tourism Leads The Way* suggested that it was worth upwards of £6 billion per annum in 1998.

Over the past ten years, there has been a 53% growth in all business trips, exceeding the overall tourism growth rate. In its totality, the sector generates 29.7% of all overseas visitors and 31.7% of inbound tourism earnings for the UK, according to the *International Passenger Survey 2001*, published by the Office for National Statistics. The conference and incentive travel segments are predicted to grow at a faster rate than any other tourism sector up to 2010. Revenues from international business tourism are estimated to account for up to 45% of total international tourism income by 2010.

Principal characteristics of business tourism include the following:

- it is at the high quality, high yield end of the tourism spectrum

- business tourism is year-round, peaking in Spring and Autumn but still with high levels of activity in the Summer and Winter months, thus sustaining permanent, full-time employment. It is estimated that the sector nationally employs around 530,000 people both directly and indirectly

- it complements the leisure tourism sector, relying on much of the same physical infrastructure, and bringing business to destinations such as seaside resorts which would otherwise be dependent upon a relatively short Summer season for their economic health and prosperity

- investments in business tourism facilities lead to the regeneration of urban and inner city areas, as evidenced by cities such as Birmingham, Belfast, Cardiff, Glasgow and Manchester

- many of the investments in a destination's infrastructure designed primarily for the business tourist (hotels, transport and communications facilities, restaurants, attractions and amenities, even conference auditoria) provide benefits which can also be enjoyed by the leisure tourist and the indigenous population

- it is resilient, being much less affected by economic downturns or by disasters such as the Foot and Mouth Epidemic than leisure tourism and other sectors of the national economy

- business tourism stimulates future inward investment as business people see the attractions of a destination while travelling on business or to attend a conference, exhibition or incentive, and then return to establish business operations there. They can also become unpaid 'ambassadors' for a destination by communicating to colleagues and others their positive impressions and favourable experiences

- the higher quality of personal service demanded by the business tourist requires more labour-intensive service suppliers, which in turn translates into higher levels of job creation. For example, 68% of all tourism jobs in Harrogate are created and sustained by business tourism (principally conferences and exhibitions), only 32% by leisure tourism. Around 22,000 jobs in the West Midlands are sustained by the NEC Group of venues (National Exhibition Centre, International Convention Centre, Symphony Hall, and the National Indoor Arena). The Scottish Exhibition and Conference Centre (Glasgow) directly supported over 3,300 jobs in Glasgow and in other regions of Scotland in 2001

- research (*Conference Delegate Expenditure Survey 1998)* suggests that approximately 40% of business travellers will return with their families as leisure visitors to destinations they have enjoyed visiting on business

- business tourism is sustainable, offering higher added value with fewer negative environmental impacts than mass leisure tourism. Furthermore, conference and incentive visitors are together as a group, so that it is possible to inform and educate them about the local community in which their event is being held in order to maximise the enjoyment of their stay but also to minimise any disruption and possible inconvenience to the local resident population. It is very much harder to manage, in the same way, the impact of individual leisure travellers on a destination.

The individual segments of business tourism (conferences and meetings, exhibitions and trade fairs, incentive travel, corporate events, outdoor events) are the five segments which are the prime focus of marketing activities by venues and destinations, because decisions about where the events take place are open to influence. The organisers of the event may have greater flexibility in deciding where it is held, and are able to use their own judgement or discretion. For this reason, these five segments are often described as 'discretionary'. Individual business travel, on the other hand, is termed 'non-discretionary' because, while the mode of transport (road, rail or air, for example) used by the individual traveller is open to influence, their actual travel destination is not.

The next section of this booklet examines the individual discretionary business tourism segments in detail, looking at their key characteristics and trends, volume and value data, issues affecting future growth, etc.

Updated information on business tourism can be accessed on the Business Tourism Partnership website: www.businesstourismpartnership.co.uk (due to go live in February/March 2003).

2. INDIVIDUAL BUSINESS TOURISM SEGMENTS

2.1 CONFERENCES AND MEETINGS

2.1.1 UK CORPORATE CONFERENCES AND MEETINGS

DEFINITION AND BACKGROUND

The corporate or for-profit segment encompasses all the varied purposes for which meetings, conferences and events are held by companies or corporate organisations, including the following:

- sales conferences
- product launches
- management meetings
- training courses
- business presentations
- Annual General meetings

(This segment can also include incentive travel – however, this is discussed as a separate segment in this booklet).

In **volume** terms the *British Conference Market Trends Survey 2001* indicates that 59% of the 1.4 million conferences and meetings held at UK venues in 2001 was generated by the corporate sector.

OTHER CHARACTERISTICS

The *UK Conference Market Survey* researches 300 corporate organisers annually. The 2002 survey revealed the following characteristics for this segment:

- Corporate events tend to have lower numbers of attendees than other types of conference (see next two sections). 68% of the events held are for less than 50 delegates and the average number of delegates attending a corporate event is 111
- The average duration of a corporate event is 1.3 days and 40% of the corporate segment's events are residential
- Their top three preferred venue types are out-of-town hotels, city centre hotels and residential conference centres
- Primarily location, price and access influence choice of venue, although quality of conference facilities and quality of service are also very important
- The average lead-time within which events take place is 5 months and 55% of events take place within 3 months, a far shorter time than most other segments.

ECONOMIC BENEFITS

It is difficult to define the universe for this segment in terms of exactly what constitutes a meeting and how many companies hold events at any one time. Estimating the value, therefore, is also difficult. However, the corporate meetings segment is recognised as one of the most valuable segments of the conference market. The *British Conference Market Trends Survey 2001* identifies the value to be £4.3 billion to venues alone. This segment tends to spend more on overnight accommodation and registration fees than other segments. The average spend per delegate per day has been identified as £140 excluding travel to and from the destination.

Corporate organisers researched during the *UK Conference Market Survey 2002* spent an average £109,700 per year on events.

TRENDS AND ISSUES

The health of the economy in general, the state of markets and market changes in industry hugely affect corporate events. They also seem to be most affected by other forms of communication. Between 1998 and 2002 the volume of events for this segment reduced by 18%.

During 2001 96% of corporate organisers made use of the Internet for communication with delegates, 72% used teleconferencing, and 62% used video conferencing, figures that have increased dramatically in the last few years. However, far from reducing the need for meetings, the proliferation of text, e mail and internet messaging has increased the value and importance of face-to-face communication. "Making messages memorable" has become the greatest business challenge of the 21st century.

Interactive conferences have become the popular vehicle for the effective delivery and retention of key messages. So, out goes the theatre-style presentation from the file of suited directors hiding behind the lectern on a lofty and distant stage and in comes "Gladiator style" in-the-round tiered seating and roving microphones for intimate and relaxed Q&A sessions.

An increasing use of theatrical and audience participation techniques is also evident. Rather than simply being added to the end of conference programmes, team challenges, quizzes and group musical performances are all being integrated to encourage real involvement and assist with message retention.

Advances in technology have also hugely influenced this segment in terms of use of presentation technology. The *UK Conference Market Survey 2002* identified that 86% of organisers used PC-linked data projection for presentations. Expectations of venues are high in terms of their ability to keep up with advances in presentation technology.

Corporate conference organisers have high expectations for all aspects of their meeting experience, demanding high quality meeting facilities and service, as justification for use of their valuable time in holding meetings. Recruiting and training staff to meet these service requirements is a continuing challenge for those providing facilities and services for conferences.

2.1.2 UK (NATIONAL) ASSOCIATION CONFERENCES

DEFINITION AND BACKGROUND

The 'national association' conference segment includes a wide range of not-for-profit organisations whose memberships and affiliations are primarily national rather than international. Such organisations include:

- professional associations and institutions
- trade associations
- trade unions
- societies and educational bodies

as well as a plethora of voluntary bodies of which membership is more related to a hobby or interest rather than a person's employment e.g. political parties, charities, voluntary associations, religious groups. The term 'national association', while not being very precise, is used to describe this segment.

In **volume** terms, research indicates:

- a universe of up to 6,500 UK national associations (Scottish Convention Bureau research in mid-1990s). However, it is a dynamic segment with associations being created (and also being dissolved) on a continuous basis, so that there can never be more than an informed estimate of the total number of such organisations
- national associations form a significant part of the UK conference market, accounting for around 24% of all conferences held (*British Conference Market Trends Survey 2001*)

Typically national associations hold a major annual conference within the UK and many arrange other, smaller meetings and conferences during the year, again mostly (and often exclusively) within the UK.

A proportion of these 'national associations' are also linked to a European or international association or federation. In this way they provide the conduit or opportunity for bids by UK associations to host the international conference (see section 2.1.3) of a particular organisation.

ECONOMIC BENEFITS

Research* undertaken by the British Association of Conference Destinations from its own database of national associations shows that the major annual conferences of these organisations bring together substantial numbers of delegates:

- 22% of national associations have an annual conference of up to 100 delegates
- 19% of national associations have an annual conference of 100-200 delegates
- 36% of national associations have an annual conference of 200-500 delegates
- 11% of national associations have an annual conference of 500-1000 delegates
- 12% of national associations have an annual conference of 1000+ delegates

(based on a sample of 1423 national associations in September 2002)*

Many of these conferences last from 2-4 days, with an average spend per delegate per day of £136 (excluding travel to and from the destination). It is not unusual, therefore, for a national association annual conference to generate expenditure of several hundred thousand pounds, while very large conferences of 1000+ delegates can produce an economic impact worth millions of pounds. For example, Bournemouth estimates the economic benefit of The Labour Party Conference to the town in 1999 at £11 million (with some 15,000 delegates staying for 5 nights each). Many delegates (often with partners) will arrive early for a conference or extend their stay once the conference is over, increasing their expenditure in a destination as leisure visitors. In addition, many contractors, suppliers and exhibitors, as well as media and security personnel in the case of major political conferences, may also arrive in a destination several days before the commencement of an event.

Benefits are not just in direct and indirect spend but also in **employment** created and sustained. Harrogate, for example, can demonstrate that, of 7000 people employed in tourism in the Harrogate district, 4750 (68%) are in jobs supported by business tourism, a large part

Seasonality is another important benefit of national association conferences, especially for those resort destinations for which leisure tourism is important. The peak seasons for national association conferences are March-June (and increasingly now into July as well) and September-November, thus extending the shoulder months surrounding the main summer season (which has tended to become shorter).

CHARACTERISTICS OF NATIONAL ASSOCIATION CONFERENCES

- Many national associations choose the locations of their conferences on a rotation system e.g. north-south rotation, or rotation around several regions of the UK on a 3 or 4-year cycle. Information on the rotation of a particular event is crucial to those destinations and venues keen to win that piece of business for themselves
- The decision-making process in respect of choice of venue/destination can be elongated, with interested locations being invited to submit a 'bid document' (paper or electronic format) which will then be considered by a selection panel or committee, and may involve the making of a formal presentation to such a panel
- The most popular types of venues used by national association conferences are city centre hotels, purpose-built conference centres and university/academic venues *(UK Conference Market Survey 2002)*
- Key factors influencing venue selection (*UK Conference Market Survey 2002)* are, in order of priority:

    1. Location
    2. Price/value for money
    3. Access (road, rail, air)
    4. Capacity of conference facilities
    5. Quality of service

  Availability of dates is also a key factor because a number of associations are locked into specific dates for the staging of their conference, restricting their choice of venue/location because the venues that they might prefer to use are not available (having other events are already booked in).

FUTURE TRENDS AND ISSUES

- The demands made upon conference venues catering for national association conferences will continue to grow, both in the provision of electronic communications technology but also in requirements for space (e.g. increasing use of syndicate/breakout rooms, greater need for exhibition space) and for higher levels of security
- Organisers are likely to seek more integrated infrastructures with high quality transport systems to and within a destination, plus venue, accommodation, restaurants and attractions in close proximity - Manchester's new 'Conventions Quarter' is one example of such a development
- More destination marketing organisations are establishing 'ambassador programmes' designed specifically to target the national and international association conference segments. Such programmes identify and recruit key individuals within local communities to act as ambassadors for the destination in promoting its benefits and in bidding to bring the major conference of the organisation of which they are a member to their own destination.

2.1.3 INTERNATIONAL ASSOCIATION CONFERENCES

DEFINITION AND BACKGROUND

The international association congress market brings together members with common professional, scientific or social interests. The associations vary in size and membership, can be regional or international in scope and use meetings as one of the most important communication methods amongst members. The associations also use their meetings as a key revenue generator to support the headquarters and fund outreach activities such as specialised research and public health campaigns as well as programmes in developing countries.

Individuals attend congresses because they provide an opportunity to share ideas and information about their industry or field, impart/gain intelligence and research and network with industry colleagues. Academic and research institutions send delegates to attend meetings so as to publish and present results of research, to gain publicity for their research units/programmes, to enhance the institution's standing and attract further government and industry sponsorship. There is also a requirement in some, particularly medical, professions to attend congresses as a part of a continuing education programme.

The congresses (sometimes called general assemblies, conventions, conferences etc.) alternate between venues within their region or the world either on a fixed rotation or by invitation. They can be held annually, or every two, three, four or even five years and a whole industry has been built up around the association meetings segment as their economic attractiveness has become apparent to destinations globally.

There are two methods of researching these congresses with a view to hosting their events in the UK: this is either done through the UK member contact or Chapter of an international association or by approaching the headquarters, usually located overseas, directly. There are clusters of international association headquarters in London, Paris, Brussels, Geneva and The Hague as well as in Washington DC. However, there is a difference in style between associations headquartered in Europe, which are usually run by a small number of full-time staff with a series of executive committees, and those located in North America, where the organisations generally have very large headquarters buildings and staff (they also tend to be much more commercially aware, having less of an historical background.) Specialised research helps convention cities determine the so-called next 'open date' (i.e. the next year for which the location of the congress has not been decided), the exact bidding process and the representative most likely to extend the invitation.

As with national association meetings, the segment encompasses a wide range of organisations which can be governmental, professional, scientific or social in nature. However, it is usually the medical, scientific and pharmaceutical meetings which are the most attractive both in terms of attendance and revenue. IT and telecommunications has also been a major industry sector using this form of communication but recent changes in the US economy and in the telecoms industry itself have certainly reduced congress demand from this sector, which had traditionally been a stable source of meetings.

It would be impossible to put a figure on the number of international associations in existence around the world. The Union of International Associations (UIA) has over 25,000 registered in its Yearbook but it is important to remember that only a fraction of these will meet internationally and on a rotational basis, making the UK a potential destination. The UIA measures approximately 9,000 meetings annually and publishes a well respected and robust annual statistical review (response rate to their questionnaire mailings is 60%). The International Congress and Convention Association (ICCA) database measures a similar level and both have extensive statistical information on the characteristics of the meetings and the destinations where these are held.

ECONOMIC BENEFITS

In value terms the most important targets for any convention city are the large congresses, ranging from 1000 to 15,000+ delegates and which attract a high overseas attendance. According to the International Passenger Survey, average expenditure per day for overseas conference delegates attending meetings in the UK in the year 2001 was £147 compared to just £58.90 per day by those visiting the UK on a general purpose visit. ICCA calculates average worldwide expenditure per delegate per day at US$343 in 2001 and total average expenditure per meeting in 2001 at over US$1.1 million.

Conferences in the medical or pharmaceutical sectors often attract lucrative sponsorship from pharmaceutical and medical equipment companies keen to promote their products and these events usually have valuable commercial exhibitions attached. The commercial sponsors will often host groups of their top clients in whichever specialist field and prepare a luxury programme for them. These groups can make up as much as 75% of the delegates attending a conference and there is competition between the companies to provide quality programmes for their delegates e.g. high quality hotels within walking distance of the conference venue and up-market exclusive social functions.

Large congresses also tend to feature pre- and post-congress tours for delegates and accompanying persons' programmes which make them doubly valuable to their chosen destination. A positive business visit could also stimulate a future leisure visit – up to 40% of business travellers to a destination return on a leisure trip.

Furthermore, winning and hosting key international conferences is seen as a major economic boost to the host city and many use the conference sector as a means of urban renewal and regeneration. The city of Glasgow employed 40,000 people on the Clyde at the height of the shipbuilding era but as the industry declined so did the area around it. The Scottish Exhibition and Conference Centre (SECC) was built on the banks of the Clyde in 1985 and over the last ten years £1 billion has been spent in transforming Clydeside as conference business and general tourism has grown. Glasgow now employs 47,000 people in tourism-related industries and it is one of the UK's most successful conference destinations.

As with the national association segment, seasonality is another positive feature of the international association segment. These congresses tend to avoid the summer months when leisure tourism is at its peak, looking instead to the Spring and Autumn periods. There are a large group of conferences that need to be run during the academic vacation period but organisers of these events will look for destinations that have a lower hotel occupancy in the July/August period and, indeed, from mid-June to the end of September. Delegates attending these conferences are more likely to bring families/accompanying people with them and add on a holiday before or after the congress. Organisers are also able to take advantage of university halls of residence to provide the budget end of the accommodation spectrum. Furthermore, with a growing number of world-class facilities being built around the UK, there are opportunities to promote good regional spread of events around the country.

The national and international association segments also provide continuous economic benefit in times of recession, either local or worldwide. While corporate events diminish at such times, association events continue regardless although numbers may be less than when economies are buoyant.

CHARACTERISTICS OF INTERNATIONAL ASSOCIATION CONFERENCES

The truly international associations hold their congresses on a rotational basis, often picking venues in Europe one year, North America the next, Asia/Pacific the next and so on according to their own statutory regions. This means that there can often be a gap of many years between the UK hosting two conferences of the same association, particularly if the event is held only every four years. For this reason this business is usually regarded as bringing one-off events to a venue/destination. Other characteristics include:

- The lead-in time can be very long: if the conference is quadrennial, an eight to twelve year gap between bidding for and actually staging the event is not unusual
- The international congress segment is city-led i.e. bids generally come from Birmingham, Barcelona or Vienna for example, rather than the UK, Spain or Austria
- When destination selection is by invitation, the UK contact is crucial in spearheading the bid process to bring the event to the UK. It is a researcher's role to identify that UK contact and encourage that person to submit a bid. It is important to note that the UK contact is rarely a full-time meeting planner or association secretariat and is more often a professional working in that field (e.g. surgeon, engineer, scientist). This makes it especially hard for them to work on producing a bid both from a time and knowledge perspective

- Many convention bureaux run conference "ambassador" programmes where they actively identify and recruit local academics and scientists who have connections to international organisations. The cities encourage their "ambassadors" to submit bids to host events in their field in their home city and ask these ambassadors to promote the destination on their behalf when attending events abroad
- For the larger congresses a Professional Conference Organiser (PCO) is often employed to take on the administration behind the event. The PCO's role would include sourcing venues, preparing a bid document, raising sponsorship, running the concurrent trade exhibition, managing finances, running promotional campaigns, establishing registration and accommodation booking systems, organising social programmes, facilitating the submission of papers and abstracts beforehand as well as actually organising the event itself. The PCO works closely with the client, venue and destination and usually charges an administration fee based on the size of the congress and the number of delegates attending
- A bid document normally has to be submitted prior to any destination selection and it is then down to members, a special committee or the headquarters to vote. The international association headquarters is not always the ultimate decision-maker in destination selection. However, they usually are when a bid is <u>not</u> required. When a bid is required, the headquarters team can be a key influencer
- Destinations and venues requested vary enormously but the larger congresses are looking for purpose-built auditoria capable of holding the main plenary session, a range of smaller meeting rooms to provide a series of concurrent sessions, along with exhibition space. They would also be looking for plenty of nearby accommodation (most organisers will request within walking distance to avoid having to pay for a coach transfer operation) and an attractive destination with a good social programme which will encourage a high delegate attendance. It is important that the destination is both financially viable in terms of the usual conference budget and cost-effective to allow low-enough registration fees which will encourage high delegate attendance.

FUTURE TRENDS AND ISSUES

Generally:-

- As international associations become larger and more complex, they are appointing "core" PCOs who look after all of their meeting requirements regardless of where the event is taking place (i.e. they are contracted to work on the event over a period of years, not just for one event). These core PCOs are also increasingly becoming secretariats for some of the bigger associations, running their recruitment drives, membership programmes and communication strategies as well as the meetings themselves. This means that core PCOs are becoming the new clients as destinations seek to identify and influence those making the decisions. The North American business has some very well established Association Management Companies (AMCs) which also act as PCOs
- As the supply of convention facilities increases around the world, competition becomes more intense. As some of the larger conferences grow in size and complexity (e.g. with an increasing number of parallel sessions), organisers are opting for a smaller number of tried and tested venues to work with. This makes it easier for the association in terms of managing the meeting. It also allows them to plan financially with greater ease and to get the dates of tenancy they want as they are a recurrent client at the venue
- The influence of industry associations will have greater impact on the destinations selected. Organisations such as the International Pharmaceutical Congress Advisory Association (IPCAA) are becoming increasingly influential and their members will only continue to support events held in destinations that suit their needs as well as those of the event. The growth of specialist industry groups linked to large international meetings will continue apace and these too will become increasingly influential in the choice of destination
- The growth of new technologies is making congresses, particularly in the scientific field, more innovative in their presentation technologies and on-line registrations. The conference venues industry is one of the first in Europe to adopt the regular use of Broadband and wireless technology with Local Area Networks (LANs) for networked electronic presentations. This greatly speeds up publication of proceedings, allows for last-minute updates and improves communication with delegates before and after the meeting. With people wanting to spend less time out of the office, they can prepare for meetings in advance and maximise the physical exchange on-site. There is a trend to reduce the length of meetings and the average length is now 3 days' duration whereas 10 years ago it was typically 5 days. As potential delegates seek to travel less or stay closer to home and as the

cost of being out of the office increases, the new communications technology, including virtual conferencing, will no doubt become a growth area

- The ongoing development of new fields of science and medicine is also leading to a greater number of more specialist conferences in this field. The industry is witnessing the evolution of very large meetings which are creating smaller, more specialised events alongside or at other times. This also makes it that much harder to track associations and their respective meetings as contacts move on and subject matters become even more complex and fragmented
- The regional meeting (e.g. European) is growing in importance compared to its international counterpart. The European Association for the Study of Diabetes (EASD), for example, is now almost the same size as the International Diabetes Federation meeting and it has a large and growing non-European-based delegate attendance. Similarly the quality of science and the size of the European Urology meeting is now more important than the international Urology meeting
- Increasingly, as congresses become larger and more important economically, particularly to the host city, the association convention is being used as a bargaining chip to engage more support or increase membership in areas of the world where it may be minimal. Often, despite a strong bid from a destination such as London, Paris, Sydney or Montreal, it is lost at the last minute with many conventions opting instead for a Far East destination or a developing country as a result of an emotional pitch. Such emerging destinations invariably do not have the National Chapter support or desired infrastructure to host a convention but they represent important new markets and new income for associations and well-established congress destinations such as the UK are increasingly finding themselves competing against such locations.

In the UK:-
The UK is considered generally to be an expensive destination with a fragmented convention industry but future business lies in the UK's key strengths which include:-

- Ease of access
- Quality and variety of venues
- High standards of service amongst UK conference organisers
- Strength of British science and medicine - British academics regularly hold key positions within the decision-making Boards of the associations
- Ease and speed of VAT reclaim
- English language which is now the language of choice for international meetings
- The UK is one of the most attractive destinations culturally for international delegates, ensuring that congresses held in the UK are better attended and more profitable than those held elsewhere.

However:-

- With the exception of one or two cities, the UK is not able to offer large-scale public subvention of conferences, venues or delegates. This is done in other cities around the world and can be a deciding factor as overall costs of conventions increase
- Public finance for new products and improvements to existing conference facilities has disappeared in the UK – except for Wales where a grant of up to £50,000 for such projects can be obtained
- The economic importance of conferences to a *country* is far more recognised by the UK's main competitor countries than it is in the UK. Obtaining governmental non-financial support for a conference bid has, until very recently, been either very difficult or impossible. The Prime Minister, for example, agreed to "front" a conference bid video for the first time ever in 2002 whereas leaders and senior statesmen from other nations have been supporting conferences in this way for many years.
- Despite the VAT recovery systems in place, not every cost can be recovered. Apart from Denmark, all other EU member states have lower concession VAT rates for tourists and conference delegates
- The importance of the accompanying exhibition, with its attendant long distance freight movements, is also affected by the UK's high tax on diesel
- Despite active ambassador programmes, the academic world is still hesitant to bid for international meetings due to a perceived heavy workload, lack of knowledge of the available convention facilities and lack of awareness of the industry support available to them. They are also less enthusiastic about their own home towns as a destination compared to their European counterparts

- The lack of a purpose-built congress centre in London, with a capacity for over 3,000 delegates, is preventing many high profile meetings, which would only consider a capital city, coming to the UK. Equally the general lack of large scale integrated hotel and meeting facilities, such as they have in the USA and the Far East, is also preventing the UK from winning many of the large conventions. However, this applies to most of Europe and, with space at a premium and public money not forthcoming, the whole European region is at a disadvantage
- The fact that the UK has not adopted the European single currency is a setback in that organising events in the UK can become more expensive with currency transaction bank charges. There is a school of thought that the UK is perceived to be "not part of Europe"
- Fewer international headquarters and secretariats are re-locating to the UK (though a key deciding factor is the influence of powerful personalities within the particular organisation) and a possible threat to meetings being held in the future is the Cabinet Office Strategy Unit Report which seeks to change the definition of charitable status and the methods of reporting

Despite all the above and whatever impacts technology, global economies and terrorism are likely to have, there is still the desire amongst international associations to meet, press the flesh and exchange views which will always remain. According to ICCA the UK's market share of the international association congress segment remains stable at around 5.6% and is second only to the USA.

The Business Tourism Partnership is working to encourage a more collaborative and cohesive approach to winning more international association conferences, particularly through the involvement of British embassies and consulates, British Council offices overseas, British Tourist Authority staff and key Government departments in the UK in the research and bidding processes. It is also actively lobbying for the construction of a major purpose-built convention centre for London (with a capacity of up to 5,000 delegates).

2.2 EXHIBITIONS

DEFINITION AND BACKGROUND

An *exhibition* is 'a professionally organised event that facilitates the meeting of buyers and sellers in a cost-effective manner'. This includes those events staged by professional associations, which organise their own exhibitions. Exhibitions can be further defined according to the market which they target; that is, whether their visitors are trade or public:

- *Trade exhibitions* are those exhibitions aimed primarily at those working within a particular trade sector. Visitors are usually required to establish their bona fides
- *Public (or Consumer) exhibitions* are primarily organised to attract the consumer, and generally a charge is made for admission. These may attract a wide general public, or tightly focused small groups
- *Trade/Public exhibitions* are a combination of trade and public exhibitions, which are organised to attract both types of visitors, such as motor and boat shows.

The exhibition sector consists of three main groups: organisers of the exhibitions, the venues where the exhibitions are held, and those businesses contracted by the organisers and/or exhibitors to supply services for/at the exhibition.

Exhibition organisers

In 2001, 386 organisers of exhibitions at qualifying venues of over 2,000 square metres of permanently-covered indoor exhibition space in the UK were identified*. About 20% of these organisers are trade associations and a further 10% are media and publishing companies, usually organising exhibitions related to their trade sector publications.

The main organising companies are members of the Association of Exhibition Organisers (AEO) which has 200 organiser and associate members (www.aeo.org.uk).

Venues

There are 38 exhibition venues in the UK which have at least 2,000 square metres of continuous, permanently-covered indoor exhibition space. There are some 400 smaller venues or facilities in which exhibitions are also held. These statistics are taken from the registered venues list compiled by *Exhibition Bulletin* and may not include every facility in which an exhibition has been held.

The Exhibition Venues Association (EVA) provides a promotional and informational network for the UK's major exhibition venues (www.exhibitionvenues.com)

Contractors

A large number of widely varying contracting companies supply specialised products and services to exhibitors and organisers. These services can take the form of registration of attendees, design and construction of exhibition stands, electrical fittings and services, floral, security and shipping.

The British Exhibition Contractors Association (BECA) represents around 300 exhibition designers, contractors and suppliers of materials and services (www.beca.org.uk).

SUMMARY OF VOLUME: UK EXHIBITIONS HELD IN 2001

The Exhibition Industry Research Group, whose members represent the three exhibition segments, supervises the collection and publication of UK exhibition data. This data is published each year as *UK Exhibition Facts*. The following is a summary of the data collected in the separate categories used for analysis for 2001:

- 823 exhibitions were recorded at venues that had at least 2,000 square metres of continuous, permanently-covered indoor exhibition space. The split between the different types of exhibitions was:
  - Trade exhibitions – 56%
  - Public (Consumer) exhibitions – 42%

- Both trade and public – 2%

- Over 9 million visitors were attracted to the exhibitions held in these venues, of which:
  - Trade exhibitions accounted for 27% of this total
  - Public (Consumer) exhibitions – 69%
  - Both trade and public – 4%

Over 6.8 million square metres of gross hall space were booked, of which 58% was occupied by trade exhibitions. Over 3.1 million square metres of this space were sold as 'net', which is the floor coverage taken up by stands alone.

- In addition there were more than 3.1 million visitors to 34 exhibitions held in outdoor venues, of which:
  - Trade exhibitions accounted for 1% of this total
  - Public (consumer) exhibitions - 94%
  - Both trade and public - 5%

However, these figures only represent qualifying venues, which are those that have at least 2,000 square metres of permanently-covered indoor exhibition space. It should be noted that a further 1,001 exhibition events were recorded by *Exhibition Bulletin*, and these took place in 390 venues throughout the UK and attracted an estimated 5 million visitors. In the main these are smaller and often regional events, which reflect to a large extent trade and general public interest in the antiques, arts and crafts sectors.

The combined total of recorded exhibitions in 2001 was therefore:

- Number of exhibitions – 1,858
- Number of visitors – 17.3 million

ECONOMIC BENEFITS

Europe has a well-established pedigree as the continent on which exhibitions developed and it is home of by far the largest number of exhibitions, many of which are major international trading events. The UK hosts a significant number of these events. The UK's exhibition industry is highly regarded for its design, presentation and entrepreneurial skills.

The direct and indirect spend by exhibition organisers, exhibitors and visitors to exhibitions results in substantial economic benefits for the U.K. Research conducted in 2001 estimated *total exhibitor expenditure* to be £2.04 billion

Total visitor spend is even greater. For example, the UK's largest public show, 'Daily Mail Ideal Home Show', held each Spring attracted 426,528 visitors in 2002 with an estimated total spend of £147 million or £345 per visitor. The estimated total spend expected after the show but as a direct result of the show was £2.1 billion or £4,929 per visitor *(Source: Vivid Interface Ltd).* 'SED' is an outdoor trade show focussing on plant and machinery. In 2002 SED attracted 19,430 visitors. The total estimated spend by visitors for orders placed at the show was £135.8 million. The total estimated spend by visitors after the show but influenced by their visit to the show was £419.5 million, giving a combined total of spend directly influenced by visits to the show of £555.3 million.

The average daily spend of *international business visitors* attending trade exhibitions in the UK was £224 in 2001, according to the International Passenger Survey (IPS) research by the Office of National Statistics. The IPS determines the average length of stay for international business visitors attending trade exhibitions as 3.6 days. It can, therefore, be calculated that a UK exhibition that attracts just 1,500 international business visitors would contribute over £1.2 million in direct spend to the economy – solely through its international business visitor component.

Figures from the British Tourist Authority (BTA) show that in 2001 the UK exhibition industry attracted 207,000 overseas visitors. The business tourism spend alone for these visitors totalled £168 million, a direct input into the UK economy. This spend does not include any income generated from sales within the exhibition itself.

All exhibitions play a vital role in the UK economy in generating exports. Many exhibitions held in the UK have established themselves as a strong base for international trade.

Exhibitions do more than just sell: they build product branding, strengthen existing customer relationships, produce high quality leads, educate, have applications for market research, generate media coverage and are often used to launch new products. Exhibitions play a vital role in the marketing mix offering a wide range of benefits.

Exhibitions provide a cost-effective competitive platform for Small and Medium-Sized Enterprises (SMEs) to promote and sell their products and services, enabling many SMEs to establish themselves in the marketplace and, through international visitor attendance at exhibitions, often providing SMEs with their first openings to export markets.

Employment in the exhibition segment reflects the high level of productivity to be found in the segment. It is estimated that the segment supports over 27,000 full-time jobs, and over 5,000 part-time jobs, which suggests that each employee is generating over £63,000 for the segment.

In terms of *seasonality,* the peak seasons for trade exhibitions are February to June and September to November, but when public exhibitions are also taken into account exhibitions become essentially a year-round activity.

CHARACTERISTICS OF EXHIBITIONS

- Most exhibitions tend to be annual and are held at the same venue year on year. There are also a number of biennial events, while some of the large international shows are just held every four years
- The time of year an exhibition is held is critical to its success. To ensure they obtain their desired time slot, organisers usually book the venue at least one year in advance
- The timing and venue chosen for exhibitions are to a large extent dictated by the market conditions of the trade sector which they represent
- Factors that influence the choice of venue for an exhibition include (in no particular order as they vary in importance between different types of exhibitions):

  1. Rental and service costs
  2. Capacity of venue
  3. Location of venue
  4. Contractual relationship with venue
  5. Accessibility of venue

- Exhibitions are the 5th largest marketing medium, attracting 11% of media expenditure in the UK, as outlined in the table below. Note that although exhibitions are ranked as the fifth highest media sector according to advertising expenditure, the exhibition expenditure figure only includes the amount spent by exhibitors attending exhibitions held at venues of over 2,000 square metres of permanently-covered indoor exhibition space. Exhibitions held at these venues account for 44% of all UK exhibitions and have 53% of the total visitors.

Media Type	**Total expenditure (£m)**	**% Expenditure**
Television	4,147	23
Regional Newspapers	2,834	16
Direct Mail	2,228	12
National Newspapers	2,071	12
Exhibitions	2,040	11
Business/Trade Press	1,202	7
Directories	959	5
Outdoor & Transport	788	4
Consumer Magazines	779	4
Radio	541	3
Internet	166	1
Cinema	164	1

Source: Advertising Association's Advertising Statistics Yearbook (except for the exhibition figure – exhibitor spend at EVA-qualifying venues)

FUTURE TRENDS AND ISSUES

Exhibition organising is a creative enterprise activity which, to survive, has to stay at the leading edge of marketing. To achieve this, the following are being considered:

- To enhance their exhibition product, an increasing number of organisers are developing conferences and specialist seminars alongside their exhibitions
- A number of technological opportunities for exhibitions are becoming available on which organisers can capitalise, using technologies like audio-conferencing, videoconferencing and webcasting
- Most exhibition organisers are setting up their own web sites to run alongside their events. A three-day event becomes a 3-month promotional event. This leads to increased opportunities for sponsorship and advertising through the web site, and allows an enhanced visitor and exhibitor experience through providing additional information and an extension in communications
- This technology also allows for on-line registration, which is growing fast, the major benefits being a faster and more convenient form of registering for an exhibition, while allowing organisers continually to update their information and keep people constantly informed
- The new technology is used to enhance (not replace) the exhibition, as there is no substitute for the face-to-face contact, customer interaction and the ability for the customer physically to feel, see, taste, smell, test and try the product
- The introduction of new venues (like ExCeL in London which provides 65,000 sq m of exhibition space) incorporating the most up-to-date facilities for web technologies and networking, IT and video conferencing. Exhibition venues need to keep abreast of new technologies to remain competitive
- More organisers are looking to increase the number of public shows. Public shows are seen as being informative, as well as providing marketing and sales opportunities, brand building and entertainment, all of which add to customer value and experience
- Organisers will continue to succeed in direct proportion to their ability to identify niche markets for new exhibitions, which are targeted directly for a specific market
- The exhibition industry is continually endeavouring to increase the 'internationality' of its shows in order to enhance the opportunity for exhibitors to increase their export markets
- The exhibition segment is taking important steps forward to meet the demands for sustainability. Action is being taken to improve performance in waste management and environmental issues, adopting new techniques to improve recycling and reduce overall waste.

** Unless stated otherwise, all figures given above are from the Exhibition Industry's 'Exhibition Facts' research into UK exhibitions held in 2001.*

2.3 INCENTIVE TRAVEL

DEFINITION AND BACKGROUND

Incentive travel is a tool used by organisations to motivate their staff and/or external sales agents, with the objective of improving performance at both individual and corporate levels. This tool offers individuals or teams the chance to qualify for an exceptional travel experience, subject to their attaining preset goals.

While corporate organisations routinely offer a range of employee rewards, including vouchers, merchandise and cash bonuses, travel has been found to be the most effective motivator. It is also the most expensive, with rewards ranging in value from £500 to £5,000 per head. Travel rewards are generally used by those industries producing a product or service that carries a high profit margin – such as cars, computers and financial services. Companies in these sectors invest accrued profit from sales to fund incentive travel programmes, which will, in turn, boost sales.

The earliest recorded incentive travel programme took place 1906, but the industry only became fully established in the 1960s, coinciding with the onset of global tourism. The United States was the first user of incentive travel and has remained the strongest market ever since.

ECONOMIC BENEFITS

Inbound and domestic tourism

There are no recent statistics determining the size and scope of the inbound incentive travel market. The last estimates were provided in a report commissioned by the British Tourist Authority and partners in 1996, which calculated the value of inbound and domestic incentive travel (excluding air travel) to be in the region of £165 million per year.

The fact that hotels do not differentiate between conference and incentive travel group bookings, makes it difficult to track occupancy levels. However, we do know that incentive groups are concentrated within the four and five star hotel properties and that they account for 5-10% of bedroom revenue in these properties.

London is the most popular UK incentive destination, followed by Edinburgh, Scottish golf resorts and Stratford-upon-Avon. Many long-haul-originating incentives are based around two centres: London plus Edinburgh, for example.

A survey of members of the Incentive Travel and Meetings Association (ITMA) and of incentive travel and conference organising agencies (key results published in 'Conference & Exhibition Fact Finder Magazine – November 2002) found that 63% of all incentive travel programmes arranged for UK clients take place within the UK and Europe. The average size of events organised by the majority of companies (63%) was between 50 and 99 people, and no increase in the size of groups was anticipated in the next two years.

In addition to accommodation, incentive participants enjoy top quality entertainment programmes as part of their reward. These include excursions, theatre trips and lavish dining experiences, often held in unique venues. The wider tourism infrastructure benefits considerably from these business customers.

The 1996 BTA research estimated personal expenditure on souvenirs and presents to be in the region of £320 per person for US-originating programmes (averaging five to seven nights' duration) and £130 for European programmes (averaging three to four nights).

The USA remains the largest national buyer of incentive travel, constituting 50% of the overseas market. Other key markets are Germany, France, Italy, Spain and Russia; also long-haul English-speaking markets, such as Australia and the Far East. In the case of the Far East, the number of participants can be quite large but the programme often less structured than those held elsewhere.

European companies are likely to operate three or four short programmes per year, in contrast to the one or two programmes operated by their American counterparts.

Domestic market

The domestic incentive market is difficult to measure accurately, since the reward media are frequently purchased off-the-shelf, in the form of hotel vouchers, weekend breaks or luxury/adventure experiences (hot air balloon rides, Formula One race days, etc).

Nevertheless, a thriving industry exists to service the needs of corporate incentive buyers and includes such specialists as voucher companies, caterers, creative theming agencies and corporate entertainment companies.

Outbound tourism

While the UK is a perennially-popular incentive travel destination, it is also one of the largest buyers of outbound incentive travel programmes. A further industry exists to devise and promote incentive campaigns culminating in overseas travel programmes. While the UK's domestic tourism infrastructure does not benefit directly from such business (other than through air, rail and sea fares), employment opportunities are provided for thousands of individuals working in dedicated incentive travel and conference agencies, business travel houses and multi-service marketing agencies. The value of this outbound incentive industry was estimated at £1.08 billion in 2001 by *Meetings & Inceentive Travel Magazine's* 'Trends and Spends Survey 2002'.

CHARACTERISTICS OF INCENTIVE TRAVEL PROGRAMMES

The fulfilment of an incentive programme is the travel experience itself, but this is preceded by a motivational campaign, beginning with a launch event. Planning cycles vary depending on the industry sector of the provider. Approximately a third of incentive campaigns start six months before the trip takes place; the remaining two thirds start between six and 18 months ahead.

Measurable objectives are set by the incentive providers – usually the company's sales or marketing director, often working in tandem with a specialist incentive travel agency. A continuous promotional campaign encourages participants to maintain high levels of performance throughout the period and the highest achievers will qualify to participate in the reward.

Historically, incentive travel has been experienced by groups of qualifiers. In recent years, however, there has been an emerging trend for winners to select the time and sometimes even the location of their reward, thus turning the reward into a private holiday with partner and/or family. This trend currently applies to about five per cent of incentives, but there is no indication that this figure is increasing. Employers generally prefer to structure the rewards as group experiences, so that the perception of being part of an elite 'achievers' club' can be maintained.

Destination selection

Selection of incentive destinations is based on a number of factors, including:

- Value for money
- Climate
- Ease of (travel) access
- Business links
- Sophisticated tourism infrastructure
- The 'wow' factor

There is a slight overlap in perception between conferences and incentives. Some incentives incorporate business meetings , while some conferences nowadays have a significant social and leisure programme, and are held in highly aspirational locations, making them motivational events. The defining line through these blurred boundaries is that participants have to qualify to earn an incentive reward.

FUTURE TRENDS AND ISSUES

Incentive travel is a well-established sector of business tourism and to international markets the UK is one of the most popular destinations.

However, visitor numbers are greatly influenced year-on-year by the strength of the pound in relation to other currencies and by issues affecting perceptions of security.

For these reasons, 2001 was a bad year for incentive travel. Foot and Mouth, September 11 and the downturns in the US, Japanese and European (particularly German) markets, all resulted in zero growth. Many American companies cancelled group bookings and/or suspended long-term planning.

Security is a major concern for incentive travel planners. American visitors have been slow to return. European buyers are determined to remain close to home. They are turning to locations with a 'safe' perception, such as Scotland. At the same time, the UK is losing out to warmer destinations such as Southern France and Spain. The 2002 ITMA Survey referred to above confirmed that the largest portion of business in the previous twelve-month period went to Spain, followed closely by France.

While the market had still not fully recovered in 2002, it is widely accepted that destination popularity is cyclical and demand is unlikely to remain depressed in the long term. Destinations currently seen as 'hot' include Iceland, Eastern Europe, Cuba, Peru and Costa Rica.

The British Tourist Authority actively promotes the UK as an incentive travel destination in 11 European and 13 long haul destinations, and as long as the UK can provide top quality tourism facilities, incentive travel will continue to play a significant role in inbound tourism.

(See also the references to incentive travel in the next section of this Briefing on 'Corporate Events')

2.4 CORPORATE EVENTS

DEFINITION AND BACKGROUND

The corporate events segment covers incentive travel, client entertainment, staff entertainment, meetings and conferences and so has a clear overlap with some of the other segments described separately in this Briefing. However, this section of the Briefing is written specifically from the perspective of companies providing specialist services to the corporate events segment (on behalf of the Corporate Event Association), thus complementing information to be found elsewhere.

There is no regular research undertaken to assess the overall volume and value of the corporate events segment to the UK, although figures of between £700 million and £1 billion are felt to be a reasonable estimate by many working in the segment. The following research findings also provide some contextual data:

- A qualitative study of 260 major blue-chip companies in 1997 (undertaken by *Total Research*) found that a quarter of all the companies surveyed spent more than £250 per head (per event) on corporate entertaining, with one in five spending more than 10% of their marketing budget on such activities. At that time the most popular types of events for entertaining clients were sporting events such as the 'Five Nations Rugby Tournament', 'British Open Golf Championship', test match cricket, horse-racing fixtures and Wimbledon tennis
- There are close links between the corporate events segment and the contract catering industry. The British Hospitality Industry Association's 'Contract Catering Industry Survey 2002' estimated the value of the contract catering industry to be £3.5 billion in 2001 (compared with £2 billion in 1993)

OVERALL TRENDS

2002 proved to be another challenging year for the UK events industry. The much-vaunted economic upturn did not appear and ongoing global unrest did little to encourage confidence or to stimulate international travel.

One of the interesting outcomes of these downturns is that they accelerate the ongoing process of change in the industry.

SPECIFIC TRENDS (BY EVENT TYPE AND PURPOSE)

Incentive Travel

Incentive travel has taken a battering in the last 18 months due to heightened security issues relating to group air travel and the poor economic environment that has, quite simply, led to fewer people reaching the sales targets that trigger incentives.

Some in the industry believe that overseas incentive rewards are in long-term decline as a motivational tool, although others dispute this. A combination of factors is contributing to this downward trend. These include the increased long-haul holiday traffic removing the cachet of winning trips to far-off places, and the gradual change in motivational practices within certain businesses.

The traditional method of rewarding a few top performers to encourage others to aspire to such heights is giving way to a broader strategy of motivating sales teams through inspirational events that unite, entertain and reward whole teams. The increased financial burdens created by tax and national insurance implications, added to the growing value placed by executives on quality time at home, are also contributing to a trend towards different types of motivational programmes which reach wider audiences.

Client Entertainment

Despite a 25-30% reduction in overall spend, the value of improving relationships with clients in a hard market was not lost by most businesses. Sales of the top events in the calendar held up well, but the "shoulder events"(e.g Henley Regatta and the Stella Artois tennis tournament at

The relative growth in participation-based events, including motor racing and clay pigeon shooting, that dominated the 1990s has also slowed as the novelty of such activities has worn off and companies have retreated to the safer and more reliable hospitality events.

Hospitality buyers focussed on entertaining fewer and more senior clients with a trend towards greater justification and control of spend on hospitality.

This increased cost control was often as a result of large organisations attempting to centralise their buying practices in order to monitor spend and improve purchasing. Many organisations have created approved supplier lists (of widely varying lengths!) as part of this process.

Staff Entertainment

Despite the tough market, the genuine value of a happy and loyal workforce has not been lost on most of the UK's leading businesses. With the recent round of redundancies, the challenge has been to strike the right balance between maintaining morale and avoiding criticism for discretionary spend in a hard market.

The 2002 Christmas Party season was a perfect reflection of this environment. Whilst few cancelled their celebrations, budget reductions and the above sensitivities cut out much of the past excesses and frills. Simpler menus, less champagne, fewer strolling entertainers, but still a great entertainment and networking event to celebrate the end of another year!

Outside of the Christmas market, summer fun days involving the whole family remain popular, but the overall trend is towards rolling entertainment into conferences and internal communication events where greater value can be achieved.

Research consistently proves that the main motivator for work is not money, so the value of maintaining a happy workforce should never be overlooked!

Meetings and Conferences

See Section 2.1.1 'UK Corporate Conferences and Meetings'.

Summary

So, despite the current downturn, as long as the industry adapts to reflect these changes in demand, its future is assured. However, event suppliers must continue to add real value to the process, through both creativity and operational excellence, to justify their position within the events marketplace.

The UK is undoubtedly leading the world in many areas of the live events industry. It can be proud of its home-grown talents – talents that are frequently exported to deliver events across Europe and further afield.

2.5 OUTDOOR EVENTS

DEFINITION AND BACKGROUND

Outdoor events have taken place in the UK since time immemorial, but the first real information on such events, jousting tournaments and village fairs, for example, developed from the times of the Crusades in the 11th and 12th centuries. Nowadays, although not all falling within the strict parameters of business tourism, high profile outdoor events cover a breadth of activity from major festivals (such as Jubilee 2002, Edinburgh International Festival), music events (e.g. Glastonbury), agricultural shows, sporting and charity events through to small village and craft events. From the beginning, outdoor events have drawn large gatherings whether local, national or international; more so than ever today, the visitor from abroad is attracted to a myriad of events in the UK, many of them being steeped in tradition and history.

The world of outdoor events has developed into a highly professional and quality standard industry made up of local authorities, show organisers, event management companies, promoters, venue owners together with suppliers of equipment and services, entertainment agencies, consultants and practitioners in general.

Little research into the value of the segment has been undertaken but a few years ago the National Outdoor Events Association (NOEA) carried out a survey and conservatively estimated that the outdoor events industry had an annual turnover of up to £1 billion.

There are probably some 5000 main suppliers of equipment and services in the UK, plus around 1500 show organisers, local authorities and event management companies involved in many thousands of events over the whole country.

The outdoor events industry is a dynamic segment of business tourism. The NOEA represents many companies generically but some are also members of specialist trade associations representing their particular interests eg. Mobile Catering, Production Services, Marquees etc. A number of these associations are linked to European or international organisations and NOEA has launched the European Outdoor Events Association with the objective of developing European Standards for Outdoor Events and also organising an international conference in 2004.

ECONOMIC BENEFITS

An article written by Jane Stanbridge for *Conference & Exhibition Fact Finder* magazine published by Batiste Publications (October 2002), and supported by The NOEA, stated that "there is no doubt that the events of 2001 had a devastating impact on the outdoor events industry generally, but the market is now recovering and moving on and it appears that the combined effect of the Millennium and Jubilee celebrations has been to create a great deal more awareness of just what can be achieved in the great outdoors, causing a general upturn in the number of new events and the rejuvenation of existing events. The benefits of these two national celebrations have been timely for an industry that has been working hard to overcome the obvious difficulties of planning ahead for outdoor events in the unpredictable British climate, while also raising the level of professionalism and becoming more creative in order to develop the potential of the outdoor events market. The increasing sophistication of equipment and the foresight of organisers are now combining to ensure that the majority of events can take place successfully whatever the weather, and not just in the traditional April to October outdoor season, but throughout the year. Marquees, once a feature solely of the summer landscape, are now used very successfully even in the depths of winter with built-in floors and heating ensuring that they are weatherproof.

Innovative ideas for different events and creative use of technology, equipment, and venues, have played a significant part in raising the profile and potential of outdoor events. With pop concerts being staged on beaches, beach sports events being staged in Hyde Park, and the solitary viewing of televised cricket matches being taken outdoors onto big screens for mass audiences, traditional ideas for appropriate venues are being challenged and opening up a world of opportunity for creating unique events."

There has also been a tremendous upsurge in "AV technology and innovative ideas used at the Jubilee celebrations as an example of how far the industry has come".

There are many hundreds of different events including exhibitions under marquees, classic car shows, agricultural and flower shows, craft and gift fairs, dog and horse shows, Antique fairs, farmers' markets, countryside and county shows, horticultural shows, highland games, steam rallies, carnivals, gardening shows, air shows, pop concerts and music festivals, firework displays, sporting events, cultural and arts festivals, Christmas fayres, water festivals, balloon festivals, military events, village town and city events, charity functions and every kind of festival catering for specialist interests and of course national and international events and extravaganza for people of all ages and cultures taking place all year round.

Many of these events last from 1-3 days and attract tens of thousands of visitors, which can involve considerable travel and staying overnight in places ranging from campsites to upmarket hotels. They have substantial benefits for local economies and can dramatically affect the environment of a region, bringing more spend from visitors and tourists and hence more employment and wealth to the community. For instance, the 'Southampton Boat Show 2002' attracted some 37,000 visitors and reported an increase in business of up to 100%.

Many visitors will arrive early at events and often leave well afterwards, thus increasing their spend. Economic benefit also derives from the hundreds of people who make the events happen: from suppliers of marquees, fencing, staging, furniture, generators, grandstands, pa equipment, temporary roadways, seating, sound equipment, temporary structures etc through to the provision of services such as catering, entertainment, medical units, health and safety co-ordination, heating, security and stewarding and traffic control management.

ORGANISATION OF EVENTS

Many events have developed from traditional backgrounds but are sufficiently flexible to adapt to new market trends and customer requirements. Most take place on an annual basis, often at the same location, although a few events rotate around the UK. Many events have to obtain planning permission from the local authority before they can officially go ahead, and take full account of the requirements of health and safety legislation. The *Conference and Exhibition Fact Finder* magazine article quoted earlier says that health and safety issues "have been the number one priority for many companies and higher standards in this area have contributed to the greater professionalism now seen in the industry. After a number of highly publicised accidents in the early '90s, the NOEA drew up a Code of Practice for outdoor events, and continues to work towards raising standards. The Code of Practice is currently being revised and a simplified, more appropriate version of the Government's Health and Safety Guide is being prepared for small local event organisers." This work impacts directly on liability insurance which is crucial for the events industry.

"Linked to health and safety, security has become a critical issue. With event licences being granted on pre-set visitor numbers, attendance levels have to be regulated. Fencing contractors are working in conjunction with security companies, for example, to ensure effective security, particularly at high profile public events like Glastonbury and Notting Hill. This leads to (greater) public confidence, better attendance and good PR for the industry."

Events take place in every corner of the UK: city centres, rural areas, mountain and coastal regions and even in very remote locations.

FUTURE TRENDS AND STANDARDS

"The efforts to raise standards in the UK have been so successful that the UK is now recognised by the rest of Europe and the USA as a leader in outdoor events with many UK companies exporting their expertise." (Conference & Exhibition Fact Finder).

There is much interest, from Europe in particular, in the development of a national industry standard in conjunction with the British Standards Institute, leading in the future to the possibility of a European Standard for Outdoor Events. But there is no complacency as " the number of new initiatives currently being developed to take the industry forward is testament to continuing awareness of the need for good housekeeping". There are many new people coming into the industry who need to be aware of the NOEA Code of Practice/national industry standards.

With the vitality and ingenuity of those in outdoor events supported by the latest technology, attracting greater numbers of visitors from the UK and abroad in the knowledge that such events will be run professionally and with higher levels of security.

There is a great deal of information about outdoor events in the UK, but there is scope to reference this more effectively and to promote UK events more actively. Both business and holiday visitors could then plan their itineraries to include visits to such events.

In summary, the economic benefits of festivals and other outdoor events are being developed in conjunction with the various Regional Agencies around the UK. For instance, the Northern Ireland Tourist Board promotes festivals and events by packaging these as short breaks/holidays. Such initiatives expand the season, generate employment and offset the decline in traditional activities (e.g. agriculture or fisheries), ensuring the continued protection of local heritage and culture by giving it a tourism-related purpose.

There is a greater need to ensure more contact between event organiser and the local tourism sector - accommodation, transport, tourist information and restaurants, together with international publicity. One example of how this can work effectively is provided by 'North West 200', the motorcycling road racing event in and around Portrush in Northern Ireland (May 2002). It attracted 130,000 visitors with 30,000 beds filled plus more than 100,000 day-trippers on race day. The estimated economic impact was: accommodation £3,600,000; day-trippers £1,000,000; transport (sea and air) £1,000,000; giving a total expenditure of £5,600,000 (source - Northern Ireland Tourist Board).

The way forward for outdoor events is closer partnership with Government departments, British Posts abroad, local and regional agencies and the events industry.

3. CAREERS IN THE BUSINESS TOURISM INDUSTRY

The business tourism industry offers a rich diversity of career and employment opportunities. Few people will become millionaires, but the rewards in terms of job satisfaction, fun, creativity, travel and building friendships around the world are rich indeed.

Unlike many other professions, the business tourism industry does not yet have clear entry routes or easily identified career progression paths. It is one of the facets which illustrate its relative immaturity as an industry. This lack of structure may be somewhat frustrating and confusing for those, both within and outside the industry, who have set their sights on reaching a particular career goal but are uncertain about how best to get there. At the same time, however, this lack of precedent and structure can encourage a greater fluidity and freedom of movement between jobs. There is often no set requirement to progress in a particular way, or to have obtained specific qualifications before being able to move on.

Many of those now working in the industry have come to it as a second or third career. This is not surprising in view of the need to be at ease in dealing with a wide range of people, or in coping with a last-minute crisis in the build-up to a high-profile event - situations which require a reasonable maturity and some experience of life.

Previous experience in hotel and catering, sales and marketing, business administration, secretarial work, financial management, local government administration, training, travel and transport, or leisure and tourism could be advantageous, depending upon the position being considered. But many other backgrounds and disciplines can also give very relevant skills and knowledge, provided that these are combined with a natural affinity for working with people.

For those looking to find employment straight from university or college, vacancies do arise in conference and incentive agencies (e.g. administrative posts, assisting in venue finding, computer work), with exhibition organisers, in conference and event venues (as assistant conference and banqueting co-ordinators, or in venue sales and marketing).

Relatively few event organisers, especially within the corporate meetings segment, are full-time organisers and meeting planners. They are first and foremost secretaries/PAs, marketing assistants/managers, training managers, or public relations executives, who find themselves asked to organise events on behalf of their department or company. Their role in event organising may, of course, develop if they prove to have the right talents and enthusiasm and if this meets the company's own development needs.

Other openings arise, from time to time, in event industry trade associations and, for those with an interest in publishing, in the industry's trade magazines (either in advertising sales or, for those with some journalistic background, as part of the editorial team). Exhibition contractors and those operating within the outdoor events segment recruit from many different technical, engineering, and administrative backgrounds (such as electricians, graphic designers, carpet fitters, etc. etc.).

Before beginning a career within business tourism, it is probably helpful to know whether one's interest is primarily in the buying or supply side of the industry. It is, of course, quite possible at a later stage to switch from one side to the other, and an understanding of how both buyers and suppliers operate is obviously important and beneficial. It is a moot point whether intermediary agencies are best described as buyers or suppliers. Their activities certainly revolve around venue finding and event management, but they do this by providing a service to their clients, the actual buyers.

It should be stressed that, while there are some huge multinational conglomerates (hotel chains, exhibition companies, for example), most companies and organisations operating within the business tourism industry are small, employing limited numbers of people. They cannot offer multiple career opportunities and endless possibilities for progression. But their smallness does often ensure that there is a great variety of work with considerable responsibility and lots of scope to display initiative. It does also mean that it is possible, quite quickly, to get to know many of the players in the industry, building friendships and networks of colleagues nationally and, indeed, across the world.

PERSONAL QUALITIES AND PEOPLE SKILLS

The business tourism industry is primarily about people. It follows, therefore, that those wishing to make their career in the industry need to be 'people' people. They need to have very good interpersonal skills and enjoy mixing with a very wide range of people. Diplomacy, flexibility, tact, patience, friendliness, approachability, a sense of humour, a team player, being able to work under pressure and to deadlines, creativity, negotiation skills, are just some of the attributes needed for success. A variety of other skills is also required depending upon the actual position occupied e.g. to be a sales professional within the exhibition segment, qualities such as being enterprising, being professional and well presented, and having the ability to listen to customer needs are crucial.

Many job advertisements do not cite 'conference' or 'event organisation' in the job title, nor as a primary function, but mention it as part of the overall duties in the role to be performed. These advertisements can be related to marketing, public relations, project management, communications and publishing, as well as those relating to charities and welfare organisations. The following job vacancy descriptions are based on actual advertisements which have appeared in national newspapers and other sources and are quoted to highlight the types of skills needed for different posts:

Conference Administrator: *Small, high-profile conference company seeks an administrator to organise prestigious events. Computer literate, well organised, meticulously accurate team player required.*

Business Development Manager: *Required for industry-leading exhibition and events services contractor. You must be an experienced sales professional able to present a portfolio of existing services to generate a new client base. With 3-5 years' experience in a similar role, you will have the confidence and ability to gain credibility at a senior level and be results-orientated. An exhibition or events sales background would be an advantage.*

Conference and Publicity Co-ordinator: *Are you a graduate with experience of organising major high-profile conferences and publicity events? Do you have proven knowledge of media and public relations? Have you at least two years' experience of project management and budgetary control? If you fit this description, you could be responsible for the planning, marketing and co-ordination of events, an annual conference and exhibition and public relations for ...(a professional medical association). You will lead a small dynamic team and, in addition to the stated skills, will be able to prioritise and juggle tasks and will have excellent oral, written, presentation, negotiation and decision-making skills. The post is likely to attract candidates who are computer literate, are ambitious, have established media contacts and enjoy UK travel.*

Event Co-ordinator (with a conference centre): *Acting as principal contact between the Centre and the client, developing, organising and managing events to ensure client requirements are carried out to the highest standard with the main objective or securing repeat and increased business. It is essential that the successful applicant has proven experience of organising events where the focus is on high quality customer care/service, possesses excellent communication skills together with the ability to produce detailed and accurate documentation. Applicants must be team players who are organised, thorough, able to work in a pressurised environment and possess a high level of motivation. This is a role for a dedicated and highly committed individual.*

Exhibition Sponsorship Executive: *High profile exhibition and media group are looking to recruit an experienced sponsorship sales person to develop and maximize revenues through the development of high-value sponsorship packages with three major consumer shows. Needs two years' proven sales experience in an exhibitions, media sales or other event environment, a good understanding of concept selling, strong project management skills, experience of working with suppliers/agencies, and an understanding of marketing, branding and sales promotion, initiative, drive, enthusiasm coupled with good interpersonal and presentation skills.*

Trainee Conference Producers: *Is business research your forte? Are you ambitious, entrepreneurial, analytical and quick to grasp new and complex topics? If a career producing and devising influential, international, high-level business conferences is your aim, you'll need a good degree/Ph.D. in Science/Geography/Surveying/Law, proven business experience (minimum one year) and financial acumen. European languages desirable.*

Head of Logistics: *Well established events agency handling product launches, conferences, sports events, corporate hospitality and incentives needs an experienced logistics person with some knowledge of producing to head up all logistics functions. Requires really strong organiser and team manager who has good communications skills and previous agency experience within international event management, who is used to covering a variety of events..*

Marketing Assistant - Conferences, Events and Promotions (local authority conference office): *As a Marketing Assistant in a small team, you will be ideas-oriented and have sound organisational ability. A practical person, with exceptional communication skills, you will be keen to become fully involved in planning, co-ordinating and implementing all factors of a project and work well in a team. You will need at least two years' marketing experience in order to meet the level of responsibility required, and previous involvement in events organisation or conference marketing would be an asset. A tourism or marketing qualification is not essential, but would be an advantage.*

The industry is broad enough to accommodate people with various working backgrounds and educational qualifications, but the common thread is the ability to build productive relationships with a wide variety of people (colleagues, clients and customers, suppliers, the media, and others) and to enjoy doing so.

SOURCES OF JOB VACANCY INFORMATION AND ADVICE

Would-be entrants to the industry should aim to get some work experience in the industry, even if this means working unpaid for a short time. The experience itself will be invaluable (and count for a lot on CVs), and it may also provide useful contacts for full-time posts.

There is a steadily expanding range of information on sources of job vacancies, which include the following:

- The Association for Conferences and Events (ACE) produces a 'Job Spot' vacancy list every month, available on a subscription basis. Details from ACE on tel: 01480 457595; email: ace@martex.co.uk
- The Association of Exhibition Organisers has a 'careers centre' on its website (www.aeo.org.uk) which includes details of job vacancies as well as other information on careers within the exhibition segment
- National newspapers (broadsheets) are a reasonable source, with 'The Guardian' being especially useful (Monday and Saturday editions).
- The industry's own trade magazines have vacancy pages, many of the vacancies being with conference agencies.

Useful **websites** include:

- www.ae-assocs.com and click the Jobs-UpData® logo
- www.meetpie.com
- www.bacd.org.uk (news and jobs pages)
- www.meetings.org
- www.abpco.org
- www.springboarduk.org.uk - Springboard UK is a national, non profit-making organisation with a mission to attract people into career and job opportunities in hospitality, leisure, travel and tourism to meet the industry's staffing needs and the aspirations of potential recruits. It operates from five regional centres (London, Nottingham, Cardiff, Manchester and Glasgow) and a network of local centres nation wide, providing careers advice and working with partners in education and industry. Further details are given on the website or by contacting Anne Walker, Managing Director, Springboard UK, 3 Denmark Street, London WC2H 8LP. Tel: 020 7497 8654

There are a number of specialist **recruitment consultancies**, although mainly dealing with vacancies for those with some relevant working experience. Such consultancies include:

1. ESP Recruitment, Studio 1, The Stableyard, 16a Balham Hill, London SW12 9EB (tel: 020 8772 9199; fax: 020 8772 9188; email: info@esprecruitment.co.uk) – contact Liz Sinclair, Director.
2. Anne Ellington Associates, 35 Gloucester Place Mews, London W1U 8BF (tel: 020 7935 2028; fax: 020 7935 4980; email: jules@jobsinevents.com ; website:www.JobsinEvents.com) - contact Jules Wilkinson, Sales & Marketing Director.
3. Billie Long Selection, London House, 271-273 King Street, London W6 9LZ (tel: 020 8741 3600; fax: 020 8741 3331; email: billie@billielong.co.uk) – contact Billie Long, Managing Director, or Suzanne Lawrence.
4. The Praxis Partnership, London House, Great Square, Braintree, Essex, CM7 1TX (tel: 020 8215 1200; email: moira@praxispartnership.com) – contact Moira Wilson-Turner
5. Dragonfly Recruitment, Greyhound House, 23-24 George Street, Richmond, Surrey TW9 1HY (tel: 020 8973 2110; website: www.dragonflyrecruitment.com – contact Bill Pretty, Director.
6. Phee Farrer Jones, Threeways House, 40-44 Clipstone Street, London W1W 5DW (tel: 020 7854 8800; website: www.pheefarrerjones.co.uk – contact Paul Farrer, Director.

4. EDUCATION AND TRAINING OPPORTUNITIES

The relative immaturity of the business tourism industry means that education and training courses are still in the process of being established. We are still some way from achieving a comprehensive, structured educational framework but recent years have seen a growth in the provision of full-time and part-time educational programmes, combined with a somewhat random, piecemeal provision of training courses, mostly short courses of one or two days' duration.

While it is not essential for those looking to make a career in the business tourism industry to have pursued a particular educational course, certain courses can provide skills and knowledge which are readily applicable to the industry. Details of the main current provision are given below.

COLLEGE AND UNIVERSITY COURSES

For those wishing to study a course which is directly relevant to a future career, the best options are probably business studies, sales and marketing, hotel and catering courses and, particularly, courses involving tourism and tourism management. Several hundred colleges and universities across the UK now offer full-time courses in travel, tourism and leisure, at a variety of levels.

Until very recently, business tourism did not feature strongly on any of these courses. This is now changing as an increasing number of educational institutions offer 'conference management' and 'event management' modules as part of tourism and hotel and catering courses, for example. However, it seems that many modules are designed for those expecting to work on the supply side of the industry, as conference or event co-ordinators in venues, for example. There has been little provision for people looking to find employment as conference/incentive/exhibition organisers.

In part to address this need, **Leeds Metropolitan University** launched a new degree course in Events Management in 1996. Available for study as a 4-year sandwich course, 3-year full-time course, or on a part-time basis for those in employment (as well as a 1-year top-up degree for students who have gained a Higher National Diploma in a related discipline or have relevant experience). The areas studied include conference and meeting planning, convention and trade show organisation, concert and event planning, security and law and contracts and tendering. To underpin these essential areas, there is further academic study exploring financial management within the event industry, strategic management and strategic human resource management. The principles of marketing are also studied in depth. There is an industry placement (unless students have substantial previous work experience in the events field) in Year 2 lasting 48 weeks, which provides a learning experience for students to develop their skills while working in the event industry.

The University also now offers an HND Events Management course of 3 years' duration.

Further details are available from: Julie Harkin Course Administrator, The School of Tourism and Hospitality Management, Faculty of Cultural and Education Studies, Leeds Metropolitan University, Calverley Street, Leeds LS1 3HE (tel: 44 (0)113-283-3447; fax: 44 (0)113-283-3111; email: events@lmu.ac.uk or j.harkin@lmu.ac.uk ; website: www.worldofevents.net)

There is also a course specific to the conference industry, an **HNC in Business - Conference and Event Management**, designed by the Association of British Professional Conference Organisers (ABPCO) in partnership with the University of Westminster and City of Westminster College, London. This 2-year part-time course (held on Thursday afternoons/evenings) is designed to equip students with:

- an understanding of the practical and theoretical applications of conference and event management
- an awareness of the general principles within which conferences are managed
- an awareness of the legal and financial implications in the context of conferences and events.

The first semester of the course focuses on helping students to understand the main principles competent Professional Conference Organiser (PCO). The second semester is dedicated to giving students an opportunity to apply their new-found knowledge, using a case study format, and requires them to combine the demanding aspects of organising a conference with the skills necessary to promote their own organisation.

Further details of the course are available from Caroline Roney, ABPCO Education and Training Co-ordinator, Congress House, 65 West Drive, Cheam, Surrey SM2 7NB (tel: 44 (0)20-8661-0877; fax: 44 (0)20-8661-9036; email: info@conforg.com).

Fife College runs a 2-year HND in Events Management, the first year forming an HNC in Events Co-ordination. The College also offers, by distance learning methods, courses which can lead to a National/Scottish Vocational Qualification (N/SVQ) in Events, up to and including Level III, for those working in the events industry.

Further details from: Bob Neilson, Fife College of Further and Higher Education, St. Brycedale Avenue, Kirkcaldy, Fife KY1 1EX (tel: +44 (0)1592 268591, ext. 2721; fax: +44 (0)1592 640225; email: b-neilson@mail.fife.ac.uk)

Sheffield Hallam University offers an MSc in European Conference Management on both a full-time and part-time basis. The University has partnerships with leading universities in Spain, Italy and Germany. Entry requirements include an honours degree or recognised equivalent qualification, as well as ability in a foreign language (especially Spanish, Italian or German).

Further details from: John Swarbrooke, Tourism Management, School of Leisure and Food Management, Sheffield Hallam University, City Campus, Howard Street, Sheffield S1 1WB (tel: +44 (0)114 225 3976; fax: +44 (0)114 225 3343; email: j.swarbrooke@shu.ac.uk)

New College Nottingham launched, in September 2001, a Foundation Degree in Events and Facilities Management. The course is 2 years' full-time (but may be completed over a longer period) and gives progression to an Honours Degree. It is aimed at people who want to follow a management career in the events industry.

Further details are available from Alan Willis, Course Leader, New College Nottingham, Adams Building, Stoney Street, Lace Market, Nottingham, NG1 1LJ (tel: 44 (0)115 910 4504; fax: 44 (0)115 910 4501; email: a.willis@ncn.ac.uk; *website:* www.ncn.ac.uk *)*

Thames Valley University, Ealing, provide a full-time or part-time BA(Hons)/DipHE in Event Management. The degree is built around a central theme of event management principles and practices that include the chance to manage and run a live event of your own.

Further details are available from e: thl@tvu.ac.uk or to arrange a visit day contact: Ray Brown on t:0208-231-2771; f: 0208-231-2744; e:ray.brown@tvu.ac.uk

SHORT COURSES AND WORKSHOPS

Various short courses, workshops and seminars are run by several trade associations, as well as other organisations. Some of these are international in nature (i.e. both in terms of delegate participation and location) and are omitted from this Briefing. Those that are essentially national include:

Association for Conferences and Events (ACE)

This Association developed a 2-day residential course entitled 'Basic Meetings Planning' which ran successfully for a number of years. ACE is currently apportioning this course into two or three single-day modules with a revised content to cover the knowledge and understanding required by some of the units in the Events N/SVQs.

Futher details are available from Association for Conferences and Events, Riverside House, High Street, Huntingdon, Cambridgeshire PE29 3SG (tel: 01480 457595; fax: 01480 412863; email: ace@martex.co.uk*)*

The Association of British Professional Conference Organisers, in addition to its HNC programme described above, runs one-day seminars in conjunction with the industry trade magazine 'Meetings & Incentive Travel'. Topics covered in 2002 included crisis management, conference catering, and risk management.

Further details are available from: Association of British Professional Conference Organisers, 6th Floor Charles House, 148-149 Great Charles Street, Birmingham B3 3HT (tel: 0121 212 1400; fax: 0121 212 3131; email: information@abpco.org*; website:* www.abpco.org*)*

Association of Exhibition Organisers (AEO)

The Association of Exhibition Organisers (AEO) provides a range of training programmes on sales, marketing, operations and personal development. These courses, aimed at those working for exhibition organising companies, are tailored to the particular business dynamics of the exhibition industry, frequently using industry-specific case studies.

In addition, the AEO organises a number of 'How to Exhibit' roadshows for small and medium-sized enterprises (SMEs). These courses outline the benefits of using exhibitions as a marketing tool, including practical advice on how, as an exhibitor, to make the most of an exhibition and demonstrations of the latest display equipment available.

The AEO holds a number of seminars throughout the year to address issues such as the Data Protection Act, health and safety, waste management and other topics of importance to the industry. It is also currently researching and developing accredited certificate and diploma courses, with the aim of commencing these in 2004. These modular courses will provide work-based qualifications.

Further details are available from: Association of Exhibition Organisers, 113 High Street, Berkshsmsted, Hertfordshire HP4 2DJ (tel: 01442 873331; fax: 01442 875551; email: info@aeo.org.uk*; website:* www.aeo.org.uk

Meetings Industry Association

The Meetings Industry Association (MIA) has launched its 'Certificate in Management Development' training programme, a series of five one-day programmes designed for middle management and run in conjunction with Stonebow, the training arm of the Hospitality Training Foundation. A Certificate is awarded on completion of all five modules.

Full details from: Meetings Industry Association, 34 High Street, Broadway, Worcestershire, WR12 7DT (tel:+44 (0)1386 858572: fax: +44 (0)1386 858596; email: mia@meetings.org*; website:* www.meetings.org

'The Art of Conference Management'

Designed for relative newcomers to the field of conference organising and those who undertake event management as a secondary role, 'The Art of Conference Management' was first held in 1985 and is claimed to be the longest-running training course of its kind in the British Isles. The course is led by Tony Carey, a well-known speaker and writer on the conference industry, assisted by specialists from different sectors of the business. The course is held over three days, normally at a central London venue, at least once a year. Subjects covered on the course include: sources of information, venue selection, site inspections, negotiation, programme planning, speaker management, hospitality planning, budgets and accounts, preparing delegates. The course fee of £650 (2001-2) includes tuition, materials, daily lunch and refreshments.

Further details are available from: Tony Carey, c/o Campaign Management Associates Limited, 6 The Bridge, Guernsey, Channel Islands, GY2 4QW (tel: +44 (0)1481-259815; fax: +44 (0)1481-241133; e-mail: tonyccma@itl.net; *website:* www.tonycarey.info*).*

International courses include:

International Association of Professional Congress Organizers (IAPCO)

The International Association of Professional Congress Organizers (IAPCO) runs courses at several levels through its Institute for Congress Management Training. The best known is the annual IAPCO Seminar on Professional Congress Organisation, popularly known as the Wolfsberg Seminar, first staged in 1975. This is a week-long seminar held in Switzerland in late January and provides a comprehensive training programme for executives involved in conference organisation, international conference destination promotion or ancillary services. Topics covered include: introduction to the industry, marketing a PCO company, congress promotion, meeting programmes, on-site management, finance, communications, technology, security, contracts, sponsorship and exhibitions, co-operation with hotels, and more. Attendance at the Seminar can earn points towards the 'Certificate in Meetings Management' (see below) of Meetings Professionals International (MPI). IAPCO also runs Advanced Management Courses.

Full details on all IAPCO courses are available from: IAPCO Secretariat, 42 Canham Road, London W3 7SR, UK (tel: 020-8749 6171; fax: 020-8740-0241; e-mail: info@iapco.org *; website:* www.iapco.org

Meeting Professionals International (MPI)

The 'Certification in Meetings Management' (CMM) has been developed by Meeting Professionals International (MPI) and is the first university co-developed global professional qualification for meeting professionals. It represents a major step towards encouraging and recognizing professionalism in meeting and conference management. The CMM focuses on strategic issues and executive decision-making.

Further details on the CMM are available from: MPI International Headquarters, 4455 LBJ Freeway, Suite 1200, Dallas, Texas 75244, USA. Tel: 001-972-702-3000; Fax: 001-972-702-3070; Email: education@mpiweb.org *Website:* www.mpiweb.org *or*

MPI European Office, 22 Route de Grundhof, L-6315 Beaufort, Grand Duchy of Luxembourg. Tel: 352-2687-6141; fax: 352-2687-6343; email: dscaillet@mpiweb.org

Society of Incentive and Travel Executives (SITE)

The Society of Incentive and Travel Executives (SITE) provides various educational tools and seminars worldwide for members to increase their level of professionalism. SITE's intensive half-day and full-day education programmes target a specific business challenge or management technique. In addition, SITE's annual university and conference both incorporate educational sessions.

Further details are available from: Society of Incentive and Travel Executives, 401 North Michigan Avenue, Chicago, Illinois 60611, USA (tel: +1-312-644-6610; fax: +1-312-527-6783; email: hq@site-intl.org*;*
website: www.site-intl.org

The Hospitality Training Foundation (HTF)

The industry's national training organisation, the Hospitality Training Foundation (HTF), Suite 5, Claremont House, 12-14 Claremont Road, West Byfleet, Surrey KT14 6DY (tel: 01932 345835 or email: info@ttento.com) is worth contacting for information on training and qualifications. However, plans have been announced to replace the HTF with a newly-created Sector Skills Council (SSC) covering Hospitality, Leisure, Travel and Tourism, which will have 'events' within its remit. The Sector Skills Council will have money to support industry training, and to represent the industry's interests in areas such as qualifications and standards, and could be operational by mid-2003.

5. NATIONAL VOCATIONAL QUALIFICATIONS FOR THE EVENTS INDUSTRY

National and Scottish Vocational Qualifications (N/SVQs), specifically designed for the events industry and awarded by City and Guilds, have now been developed. Events N/SVQs are for almost anyone in the events industry, particularly those involved in:

- organising events
- working at event venues
- exhibiting
- supplying goods and services for events

Events N/SVQs are available at Levels 2, 3 and 4 for practitioners, senior practitioners, supervisors and managers. The N/SVQs provide different qualification routes for:

- event organisers
- venue providers
- exhibitors
- suppliers

The efforts to establish Events N/SVQs have been spearheaded by the Events Sector Industry Training Organisation (ESITO), on which a number of business tourism trade associations are represented.
ESITO is also an assessment centre accredited by City and Guilds for Events N/SVQs.

Further information on Events N/SVQs is available from: ESITO, Riverside House, High Street, Huntingdon, Cambridgeshire PE29 3SG (fax: +44 (0)1480-412863).

ESITO is also one of a number of European bodies (the others being the Institute for Vocational Training – Portugal, The Prague Congress Centre – Czech Republic, the German Trade Fair Association AUMA, and the Travel, Tourism and Events National Training Organization - UK) which together applied successfully in 2002 for part funding from the European Commission Leonardo Programme in order to develop a programme and support materials for international event organisers. The aims of this project were summarized as:

- to identify the skills, knowledge and understanding required of events organisers in an international context
- to agree common learning objectives for international event organisers
- to develop an agreed common learning programme and flexible learning support material and to train trainers in how to use them
- to develop common testing mechanisms to measure progress toward achievement of the agreed common learning objectives
- to evaluate the effectiveness of the materials
- to disseminate the details of the project, the support materials and the final results.

The project is not intended to compete in any way with programmes set up by national bodies within individual European countries.

6. THE ROLES OF THE BUSINESS TOURISM PARTNERSHIP AND ITS MEMBER ORGANISATIONS

a) The Business Tourism Partnership

Mission: To lead the way in supporting a competitive, high quality and more profitable business tourism sector in the UK.

OBJECTIVES

1. To provide a forum for members to select the important issues within and about business tourism for the Partnership to pursue and then to help achieve specific goals.

a) By organising three meetings of the Partnership per annum
b) By preparing a sector "manifesto" to outline key needs of the industry
c) By establishing task groups to work on specific issues

2. To act as a central focus (one with a grasp of key economic data and business benefits) for lobbying and to speak up collectively for business tourism independently of government departments and agencies, ensuring all the different sectors are given equal weight.

a) By lobbying and briefing government departments and agencies for better recognition and greater resources
b) By being represented on appropriate committees, working groups and forums
c) By participating in meetings and conferences representing the needs of the sector

3. To work with agencies and industry representatives to influence policies favourable to the development of business tourism and which will provide a more competitive, higher quality product and generate additional economic benefit for the UK and for member organisations.

a) By broadening membership of the Partnership to include DTI, DfES, Regional Development Agencies and a broader cross section of industry representatives, especially incentive travel and corporate events/hospitality
b) By pooling expertise and exchanging information so as to better monitor the performance of the sector
c) By convening delegations of Partnership members to work with government departments and agencies on sector issues
d) By encouraging individual members' responses to government departments and other bodies to reflect the consensus view of the membership i.e. "speak with one voice"
e) By providing a two-way conduit for communication between the BTA and representative bodies within business tourism
f) By supporting individual member organisations in pursuit of their own sector priorities.

4. Implement an effective communications strategy to better inform key influencers and industry practitioners of the work of the Partnership.

a) By preparing a regular briefing paper detailing the work of the Partnership (for members' own use)
b) By issuing press releases and communiqués on common positions agreed by members of the Partnership

c) By preparing a concise pamphlet emphasising the scope and significance of business tourism
d) By hosting a briefing of key influencers annually
e) By organising an industry conference biennially.

b) BTP MEMBER ORGANISATIONS

Membership of the Business Tourism Partnership (as at January 2003) comprised:

Association for Conferences and Events
Riverside House, High Street, Huntingdon, Cambridgeshire, PE29 3SG
T: 01480-457595; **F**: 01480-412863; **E**: ace@martex.co.uk;
W: www.martex.co.uk/ace

The Association for Conferences and Events (ACE) acts as an information centre and forum for member organisations involved in the organising, marketing, accommodation and servicing of events. ACE also organises training courses on aspects of event planning and management.

Association of British Professional Conference Organisers
6th Floor, Charles House, 148-149 Great Charles Street, Birmingham, B3 3HT
T 0121-212-1400; **F**: 0121 212 3131; **E**: information@abpco.org **W**: www.abpco.org

The Association of British Professional Conference Organisers (ABPCO) provides marketing, networking, education and representation services for its members, and is the only association in the UK whose membership comprises exclusively Professional Conference Organisers.

Association of Exhibition Organisers
113 High Street, Berkhamsted, Herts, HP4 2DJ
T: 01442-873331; **F**: 01442-875551; **E**: info@aeo.org.uk; **W**: www.aeo.org.uk

The aeo (Association of Exhibition Organisers) is the trade body representing exhibition organisers in the UK and internationally. It has over 200 members, and is an independent association predominantly funded by member subscriptions. Its mission is to increase the significance of exhibitions within the marketing mix and to satisfy the needs of exhibitors/visitors.

British Association of Conference Destinations
6th Floor Charles House, 148-149 Great Charles Street, Birmingham, B3 3HT
***T**: 0121-212-1400; **F**: 0121-212-3131; **E**: info@bacd.org.uk; **W**: www.bacd.org.uk*

The British Association of Conference Destinations (BACD) seeks to be "the voice" of conference destinations and related facilities and services. Activities include collaborative marketing with members, publications, databases, research, education and training and political lobbying.

British Hospitality Association
Queens House, 55-56 Lincoln's Inn Fields, London, WC2A 3BH
T: 020 7404 7744; **F**: 020 7404 7799; **E**: bob.bacon@bha.org.uk; **W**: www.bha-online.org.uk

The British Hospitality Association (BHA) represents the hotel, restaurant and catering industry, which has a total turnover of some £60 billion. Members range from major groups to individually-owned businesses and employ around 400,000 people.

British Incoming Tour Operators Association
Vigilant House, 120 Wilton Road, London, SW1V 1JZ
T: 020 7931 0601; **F**: 020 7828 0531; **E**: mailbox@bitoa.co.uk; **W**: www.bitoa.co.uk

The British Incoming Tour Operators' Association (BITOA) is the official trade body representing Britain's tourism industry. Members include tour operators, hoteliers, attractions, heritage sites and national and regional tourist boards.

British Tourist Authority
Business Tourism Department, Thames Tower, Black's Road, Hammersmith, London W6 9EL

T: 020 8563 3251; **F**: 020 8563 3257; **E**: abates@bta.org.uk; **W**: www.visitbritain.com

The British Tourist Authority (BTA) is the national tourist office of the UK, responsible for promoting the UK as a leisure and business tourism destination to overseas markets. A dedicated Business Tourism Department operates from London and there are specialist Business Tourism personnel in most of the 27 BTA offices around the world.

Business Tourism Scotland
C/o Mike Closier, Scottish Exhibition and Conference Centre, Glasgow G3 8YW
T: 0141 248 3000; **F**: 0141 226 3423; **E**: Mike.closier@secc.co.uk

Business Tourism Scotland (BTS) is a membership body for companies and organisations working in the sector in Scotland. Activities include an annual conference, networking, and lobbying to create a greater awareness of business tourism across Scotland.

Department for Culture, Media & Sport
Tourism Division, 2-4 Cockspur Street, London SW1Y 5DH
T: 020 7211 6327; **F**: 020 7211 6319; **F**: John.Irving@culture.gov.uk

Department for Transport
Transport Policy & Delivery Division, Great Minster House, 76 Marsham Street, London SW1P 4DR
T: 020 7944 5152; **E**: Catherine.Cornwell@dft.gsi.gov.uk or Nigel.Dotchin@dft.gsi.gov.uk

Department of Trade & Industry
Head of Business, Retailing & Consumer Services, 151 Buckingham Palace Road, London SW1W 9SS
T: 020 7215 4153; **F**: 020 7215 2975; **E**: Lesley.Forsdike@dti.gsi.gov.uk; **W**: www.dti.gov.uk

English Tourism Council
Thames Tower, Black's Road, London W6 9EL
T: 020 8563 3052; **E**: Tblightman@englishtourism.org.uk

Exhibition Venues Association
15 Keeble Court, Fairmeadows, North Seaton, Northumberland NE63 9SF
T: 01670 523568 or 818801; **F**: 01670 854445; **E**: info@exhibitionvenues.com;
W: www.exhibitionvenues.com

The Exhibition Venues Association (EVA) represents the leading exhibition venues in the UK and Ireland. Activities include lobbying, marketing and information sharing.

Incentive Travel and Meetings Association
26-28 Station Road, Redhill, Surrey RH1 1PD
T: 01737 779928; **F**: 01737 779749; **E**: info@itma-online.org; **W**: www.itma-online.org

The Incentive Travel and Meetings Association (ITMA) is the representative body for those organisations specialising in the provision of motivational travel programmes and corporate events.

International Congress and Convention Association (UK & Ireland Chapter)
Jenny Salsbury, Director Conferences, Scottish Exhibition and Conference Centre, Glasgow G3 8YW
T: 0141 275 6346; **F**: 0141 581 4960; **E**: Jenny.Salsbury@secc.co.uk

The International Congress and Convention Association (ICCA) provides an international network for meetings professionals (members include PCOs, venues/destinations, airlines and travel agents). It maintains a database of international association and corporate events.

London Tourist Board & Convention Bureau
1 Warwick Row, London, SWE1 5ER
T: 020 7932-2000; **F**: 020 7932 2068; **E**: enquiries@londontouristboard.co.uk;
W: www.londontouristboard.com

The London Tourist Board & Convention Bureau is the statutory body charged with the promotion of London as a leisure and business tourism destination.

Meetings Industry Association
34 High Street, Broadway, Worcestershire, WR12 7DT
T: 01386-858572; **F**: 01386 858986; **E**: mia@meetings.org; **W**: www.meetings.org

The Meetings Industry Association (MIA) provides training opportunities in response to the needs of its members to help improve business performance, and is pioneering 'Hospitality Assured Meetings'. Has almost 700 members from the supply side of British conference industry. Supports industry research and lobbying, and provides joint marketing opportunities for its members.

National Outdoor Events Association
7 Hamilton Way, Wallington, Surrey, SM6 9NJ
T: 020 8669 8121; **F**: 020 8647 1128; **E**: Secretary@noea.org.uk **W**: www.noea.org.uk

The National Outdoor Events Association (NOEA) is the forum for the world of outdoor events representing local authorities, show organisers, promoters, event management companies, venue owners, charities, suppliers of equipment and services together with entertainment agencies, consultants and practitioners in general.

Northern Ireland Tourist Board
Northern Ireland Conference Bureau, St Anne's Court, 59 North Street, Belfast BT1 lNB
T: 028 9031 5513; **F**: 028 9031 5544; **E**: nicb@nitb.com; **W**: www.convention-nireland.com

Scottish Convention Bureau
23 Ravelston Terrace, Edinburgh EH4 3TP
T: 0131 343 1608; **F**: 0131 343 1844; **E**: conventionbureau@visitscotland.com
W: www.conventionscotland.com

The Scottish Convention Bureau (SCB) promotes Scotland as an attractive destination for conferences, meetings and incentive travel. SCB also operates an enquiry service, produces guides to help the conference and incentive planner, and organises familiarisation trips for qualified buyers.

Venuemasters
The Workstation,15 Paternoster Row, Sheffield, S1 2BX
T: 0114 249 3090; **F**: 0114 249 3091; **E**: info@venuemasters.co.uk; **W**: www.venuemasters.co.uk

Venuemasters promotes the facilities available to event organisers at 100 universities and colleges located throughout the UK. Organisers can use the company's Free Enquiry Service to check availability and other details and discover how 'finding the right venue is academic'.

Wales Tourist Board
Business Tourism Unit, Brunel House, 2 Fitzalan Road, Cardiff CF24 0UY
T: 029 20 475202; **F**: 029 20 475321; **E**: business-tourism@tourism.wales.gov.uk;
W: www.meetings.visitwales.com and www.incentives.visitwales.com

The Wales Tourist Board provides a wide range of services to the meetings and incentives markets, including the handling of enquiries, promotion of venues, production of marketing collateral, marketing campaigns and participation in business events within the UK and overseas.

This Briefing also includes information contributed by the Corporate Event Association (www.eventassociation.co.uk) although, at the time of publication, they were not members of the Business Tourism Partnership.

THE BUSINESS TOURISM PARTNERSHIP

- Association of British Professional Conference Organisers
- Association for Conferences and Events
- Association of Exhibition Organisers
- British Association of Conference Destinations
- British Hospitality Association
- British Incoming Tour Operators Association
- British Tourist Authority
- Business Tourism Scotland
- English Tourism Council
- Exhibition Venues Association
- Incentive Travel and Meetings Association
- International Congress & Convention Association (UK & Ireland)
- London Tourist Board & Convention Bureau
- Meetings Industry Association
- National Outdoor Events Association
- Northern Ireland Tourist Board
- Scottish Convention Bureau
- Venuemasters
- Wales Tourist Board

The Partnership has as its members the leading trade associations and government agencies with an interest in the sector. It exists to lead the way in supporting a competitive, high quality and more profitable business tourism sector in Britain.

BUSINESS TOURISM PARTNERSHIP
Leading the way

www.businesstourismpartnership.com

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