



The Economic Impact of the UK Meeting & Event Industry



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Executive Summary

This economic impact study presents a milestone in the history of the UK meeting industry, calculating for the first time the sector's value to the UK economy. The study was commissioned by the MPI Foundation and was supported by industry investors who are acknowledged herein. The research was undertaken by the International Centre for Research in Events, Tourism and Hospitality at Leeds Metropolitan University.

More than 1.3 million meetings were held in the UK in 2011 in more than 10,000 venues. Attendees spent just under £40 billion attending UK meetings, and most meetings took place in London, the South East and the West Midlands. After England, Scotland took the lead in hosting the largest number of meetings. Whilst large hotels hosted most meetings, unusual and unique venues proved popular for conference organisers, and small hotels more popular for incentive events. Corporate clients hosted the vast majority of events, with many (more than 60%) favouring smaller meetings of less than 100 people. Meeting organisers staged on average 147 events in the year and received £11 billion from hosting meetings in the UK and £1.4 billion from hosting meetings outside the UK.

The profile data reveal a significant amount of activity that is geographically spread across the UK. This study underlines the importance of this activity beyond benefits to businesses attending and staging events, to the UK economy as a whole. Results reveal that the meeting industry rated 17th among more than 100 industries in the UK, generating more than £20.6 billion in gross value added (GVA) and £58.4 billion in gross domestic product (GDP) in 2011.

The total GDP generated by meetings accounts for about 2.9% of the UK GDP. As well as making a significant contribution to that GDP, the meeting industry is a significant employer; results reveal that the sector directly generated 423,500 full-time equivalent jobs across a wide range of industries, and when considering the direct, indirect and induced jobs supported by the meeting industry, this number rises to more than one million. The meeting industry contributed more than £21 billion to tax revenues.

Many studies have sought to measure the role of meetings globally and in the UK. However, the common challenge in researching the sector has been the fragmentation of the industry, which makes it difficult to define and access data. Meetings are not an industrial sector, but “a form of final demand, which may involve the majority of sectors, such as accommodation, construction, entertainment, in an economy to a greater or lesser degree” and the output and employment of those sectors are dependent on meeting demands.²

To overcome these identified challenges, the findings herein have used a methodology that has been developed by the UN World Tourism Organisation. The purpose of this methodology is to evaluate the economic importance of the meeting industry and support the development of more robust and consistent measures that can be compared internationally and used to demonstrate to policy makers the role meetings play in economies. National studies using this methodology and the consistent definitions of what constitutes the meeting industry have been undertaken in the USA, Canada, Mexico, Australia and Denmark.

Whilst previous studies commissioned by MPI have focused on national economic impact, the UK economic impact study is the first MPI-commissioned study to provide data at a sub-national level. The study has produced profile data and economic impact at home country and regional levels as well as in five cities, namely, London, Edinburgh, Cardiff, Belfast and Liverpool. The research also included assessments on the revenues generated from UK companies that hosted events overseas, economic leakage and the spend of accompanying persons, making this study the most comprehensive picture of the meeting industry to date for the UK and one of the most comprehensive studies undertaken internationally.

1. INTRODUCTION

1.1. Background to the Study

The UK Economic Impact Study (UKEIS), commissioned by the Meeting Professionals International (MPI) Foundation and undertaken by Leeds Metropolitan University, represents a landmark study for the UK meeting industry. It is, to date, the most comprehensive assessment of the economic impact of the industry on the British economy.

Although there has been growing recognition that the meeting industry makes a substantial economic contribution, the evidence base to support such a claim has, until now, been fragmented. Several valuable studies have been undertaken in recent years that have incorporated elements of the meeting industry, but their approach to economic modelling and data gathering have varied significantly. The lack of consistency and alignment with international standards has also prevented comparison between the value of the industry in one country and another. More importantly, it has made it difficult for the representatives of the meeting industry to provide evidence of its significance effectively.

In order to provide a comprehensive profile of the UK meeting industry and to measure its economic impact robustly, the UKEIS adopted a framework designed by the UN World Tourism Organisation (UNWTO) for measuring the sector's economic importance.³ This framework has been used for similar studies of the meeting industry in the USA, Canada, Mexico, Australia and Denmark. One of its particular strengths is that it connects with official national accounting systems, specifically Tourism Satellite Accounts.

1.2. UK Economic Impact Study Objectives

This study was commissioned in 2012. The most recent full calendar year of data available was, therefore, for 2011. To achieve its aim of assessing the economic impact of the meeting industry on the British economy, the objectives were to:

- Utilise the framework developed by the UNWTO and apply the approaches used in previous EIS studies in the USA and Canada,
- Collect data from both the demand and supply sides of the UK meeting industry to establish a comprehensive profile of the industry at both national and regional levels,
- Follow the UNWTO's initiatives by constructing the UK meeting tourism satellite account,
- Measure the direct economic contribution of the UK meeting industry at both national and regional levels,
- Measure the indirect and induced economic impact of the UK meeting industry and
- Provide a standard approach for future studies of the UK meeting industry.

1.3. Refinements on Earlier Approaches

The sector's economic research in the USA,⁴ Mexico⁵ and Canada⁶ that informed this report were studies of national economies. This study disaggregates the analysis to home country and English regional levels, as well as for five UK cities (Belfast, Cardiff, Edinburgh, Liverpool and London). It also enhances earlier approaches by:

- Including economic leakages and the impacts of imports, thus, calculating the extent to which meetings spend flows out of the UK economy;
- Including contribution of meetings outside the UK by British meeting organisers; and
- Verifying 2011 estimations with data collected for 2012 live events.

1.4. Structure of the Report

The remainder of this report is divided into the following sections.

Section 2 outlines the UNWTO’s framework for measuring the economic importance of the meetings industry, which has been utilised for this study.

Section 3 explains the theoretical and methodological considerations associated with this research. The study was divided into two stages. The first consisted of primary and secondary data collection to construct a profile of the industry. The second stage involved building a UK Meeting Tourism Satellite Account (MTSA) and undertaking Input-Output (I-O) modelling to estimate the economic contribution of the meeting industry.

Section 4 provides a profile of the meeting industry.⁷

Section 5 presents the findings—the economic importance of the meeting industry in terms of direct Gross Value Added (GVA) and direct employment, generated by the MTSA. It should be noted that the MTSA is an account rather than a model.⁸ It can, therefore, capture economic contributions directly associated with meetings activities, but cannot evaluate the total economic impact, in particular the indirect and induced impact of the meeting industry. I-O modelling evaluates the total economic impact of the meeting industry in terms of total gross domestic product, industry output, employment, wages and salaries, tax and import.

Section 6 concludes the report findings.

Section 7 presents appendices to support the contents of this report.

2. THE UNWTO’S APPROACH TO MEASURING THE ECONOMIC IMPACT OF THE MEETING INDUSTRY

2.1. Background on the UNWTO (2006) Study⁹

In order to demonstrate the value of the meeting industry in a consistent and credible manner, key organisations in the sector, including Reed Travel Exhibitions, the International Congress & Convention Association (ICCA) and Meeting Professionals International (MPI), joined with the UNWTO to undertake a study to adapt the Tourism Satellite Accounts (TSAs) to “reflect the real importance of the meetings industry and its contribution to tourism” (p. vii).

As the meeting industry brings delegates to host destinations and these delegates consume similar services to those consumed by tourists (hotels, restaurants and local transport), there has been a long-standing connection between meetings and tourism. For many, the predominant, if not entire value of meetings, is seen to be their ability to attract delegates/tourists to a region, and hence it is not surprising that measures used in the tourism industry would be seen as an appropriate base from which to assess the value of meetings. The fact that both industries are termed “demand-side activities,” where consumers rather than suppliers determine economic contribution, further enhances the connection.

2.2. Key Definitions and Scope of the Meetings Industry by UNWTO (2006)

The UNWTO study revealed that a fundamental problem in seeking to assess the size and value of the meeting industry was the fact that it had a proliferation of definitions and no consistency as to which components of the industry should be included. According to UNWTO (2006), the following four dimensions are needed to adequately define a meeting.

1. Meeting aims
2. Meetings venues
3. Meeting size
4. Meeting duration

After an extensive literature review and discussion with key informants, the UNWTO report recommended definitions for each of the four elements, and these are included in Table 1. For this particular study, three additional dimensions have been included: meeting location, key meeting types and meeting types excluded.

Table 1. Definition of a Meeting

Meeting Aims	To motivate participants, to conduct business, to share ideas, to learn, to socialise and to hold discussions.
Meeting Length	Four hours or more
Meeting Size	Minimum 10 participants
Meeting Venue	Where there is payment for the use of a contracted venue for meetings.
Meeting Location	United Kingdom
Key Meeting Types	<ul style="list-style-type: none"> • Conventions/conferences/congresses • Trade shows/business exhibitions • Consumer shows/consumer exhibitions • Incentive events • Corporate/business meetings • Other meetings (which qualify under the defined criteria above)
Meeting Types Excluded	<ul style="list-style-type: none"> • Social or recreational/entertainment activities • Formal educational activities • Political campaign rallies

SOURCE: UNWTO⁷

2.3. The TSA and the Meeting Industry

2.3.1. The Tourism Satellite Account and Its Limitations for the Meeting Industry

Most countries use the International Standard Industrial Classification (ISIC), or a variation of it, to classify the industries that appear in their National Accounts. This is the manner by which the economic contribution of different industries is identified. The ISIC code categorises groups of businesses that produce similar products, and it focuses on the supply side of the equation.

Tourism is not included in ISIC or in the National Accounts; it is a demand-side activity—it depends on the status and behav-

jour of consumers rather than the types of suppliers. In the National Accounts, the economic contribution of tourism is spread across the many ISIC-defined industries that make up tourism, such as accommodation and transport. As tourism is not identified separately in the National Accounts, it was not possible to identify tourism's economic contribution or compare it with the economic contributions of other industries.

In order to address this problem, the concept of Tourism Satellite Accounts was introduced. As the name suggests, a TSA is a component of the National Accounts that enables the economic contribution of the tourism industry to be measured and compared in a method consistent with the National Accounts. A TSA extracts the tourism-related activity from the National Accounts by examining the expenditure patterns of tourists collected via surveys and extracting expenditure made by tourists within other industries listed in the National Accounts.

The TSA separates products into two categories, namely, specific tourism products (tourism-characteristic and tourism-connected products) and non-specific products (other products that are consumed by tourists but don't fall into the previous categories). Tourism-characteristic products are those that would cease to exist, or whose consumption would substantially decline, if tourism were to cease. Tourism-connected products are those where the amount consumed is significant for the tourist and/or the producer.

The development of the TSA provided a means for the economic contribution of tourism to be identified in a method consistent with the National Accounts that was seen as credible by government treasury officials.

Like tourism, the meeting industry is largely a demand-side activity and does not have an ISIC code. As a consequence, it is not recognised in the National Accounts, and thus its economic contribution could not be identified. Whilst utilisation of the TSA framework for the meeting industry has some substantial appeal, the UNWTO (2006) identified that there were two major limitations to this endeavour:

1. The lack of a clear definition of the meeting industry and
2. The lists of tourism-characteristic industries and products do not reflect meetings activities.

There is also the issue that a large number of meeting attendees reside in the host destination and therefore do not fit the classification of a tourist under the TSA. As such, the economic activity of these local meeting attendees could not be included in the TSA, resulting in a significant understatement of the economic contribution of the meeting industry to the economy.

Despite the obvious appeal of using the TSA to estimate the economic contribution of the meeting industry as identified above, the existing TSA structure was not able to satisfy the task. Although the two industries overlap, neither is totally covered by the other, with most tourism activity being non-meeting activity and a large percentage of meeting activity being for non-tourists. Amendments were required to the TSA structure if it was to be able to estimate the economic contribution of the meeting sector.

2.3.2. Adaptations of the TSA to Cover the Meeting Industry

In order to address the limitations of using the TSA to estimate meeting industry activity, the UNWTO (2006) proposed a clear definition for the sector and its various dimensions, as summarised in Table 1. On the supply side, the UNWTO (2006) recommended the establishment of a new ISIC category to collect economic data on industries identified as "meeting-characteristic industries." The new code, ISIC 8230, is titled "Convention and trade show organisers" and defines the scope of the meeting industry. It was acknowledged, however, that there are some

limitations in the use of this single code to reflect the supply side of the meeting industry, including the facts that not all sector businesses are included in the definition and that there are many organisations that host meetings whose primary activity does not fall under ISIC 8230.

Whilst the meeting industry would undoubtedly like to see a separate satellite account established, there is little chance of such an outcome occurring in the foreseeable future. The UNWTO (2006) indicated that the most appropriate option for estimating the contribution of the meeting industry was to incorporate into the TSA framework a complementary set of tables that specifically identify meeting activities. The method involves undertaking supply-side and demand-side analyses as follows.

Supply Side

- Use ISIC 8230 to define the meeting industry.
- Identify the industries that should be classified as meetings-characteristic industries, such as accommodation providers.
- Identify a list of services provided by the meeting industry as a whole.
- Collect data from in-scope businesses on dimensions such as income, costs, employment, number of meetings held, number of participants (categorised by local, domestic visitors and international visitors) and investment.

Demand Side

- Collect data from samples of meeting attendees and accompanying persons on their expenditure behaviour, including categories of expenditure, length of the meeting, length of stay in the destination and numbers in the travel party.

Data that are collected can then be incorporated into the TSA. In addition to the standard tourism-characteristic industries, there will also be meetings-characteristic industries that entail additional tables to those that are standard in the TSA. These tables provide the opportunity to insert the activity of meeting attendees who are from the local area who would not be included in the standard TSA.

2.4. A Summary of Previous Studies Using the UNWTO Approach

The UNWTO approach has been used in national studies to estimate the economic contribution of the meeting industry in five countries as listed in Table 2.

Table 2. Studies Undertaken Using the UNWTO Approach

STUDY NAME	AUTHOR
National Business Events Study (2005) Australia ¹⁰	Deery, Jago, Fredline & Dwyer for STCRC
The Economic Contribution of Meetings Activity in Canada (2008)	Maritz Research for MPI Canada
The Economic Significance of Meetings to the US Economy (2011)	PWC on behalf of the Convention Industry Council
The Economic Significance of Meetings to Mexico (2011)	PWC on behalf of Tourism Mexico
The Economic Contribution of Meeting Activity in Denmark (2012)	Visit Denmark

Whilst the UNWTO approach provides general guidelines to the estimation of the economic contribution of the meeting industry, it is not prescriptive. This has provided the appropriate flexibility in the manner in which the approach has been operationalized in the various studies that have been undertaken using this method. As each study has adopted the main UNWTO guidelines, however, there is a general level of comparability among studies. A comparison of the five studies across a range of dimensions can be found in Appendix 1.

3. METHODOLOGY

3.1. Primary Data Collection and Establishment of an Industry Profile

3.1.1. Primary Data Collection

In the first phase, researchers collected data and processed it from primary and secondary sources, so that meetings activities could be captured and presented. Based on these data, they estimated an input of participant (meeting attendee¹¹) and non-participant spending (meeting organisations and venues) for the four home countries (England, Scotland, Wales, Northern Ireland), the main regions of England (East, East Midlands, Greater London, North East, North West, South East, South West, West Midlands and Yorkshire and the Humber) and five UK cities (Belfast, Cardiff, Edinburgh, Liverpool and London).

Using the input data, the team established the profile of the meeting industry, including meetings activities, meeting demand volume and spending profile. Spending profile included not only the total spending for the meeting industry, but spending categorised under different meeting types, for example trade shows, incentive events and conferences. Primary research consisted of online surveys aimed at five stakeholder groups of both the demand side (meeting attendees and exhibitors) and the supply side (meeting organisers, venue managers and destination management organisations).

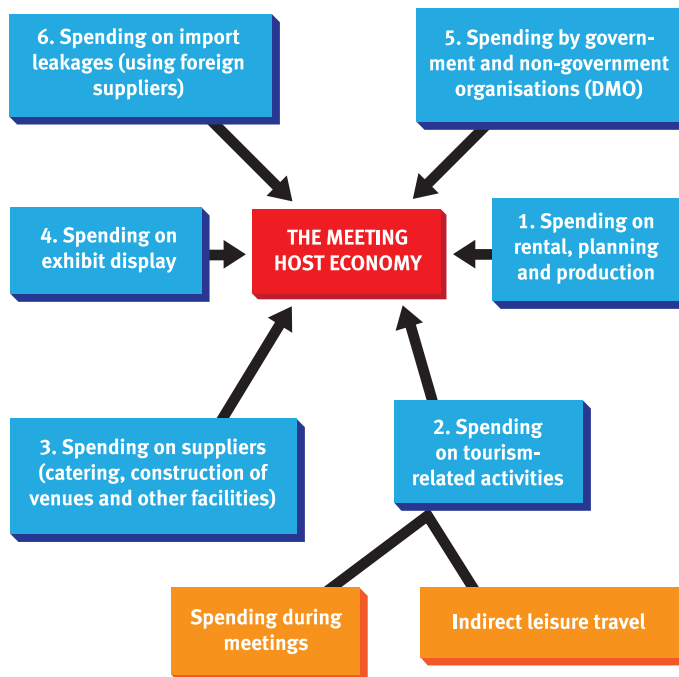
Previous studies informed the design of research instruments, especially those undertaken by the UNWTO and other EIS projects in the USA, Canada and Mexico. Samples were derived from databases held by Leeds Metropolitan University, Experian and other stakeholders. Links to questionnaires were sent to prospective participants via email. Online panel recruitment was also used to obtain meeting attendee and exhibitor data, as well as additional responses from meeting organisers and venue managers. Responses were gathered through panel surveys from international attendees and exhibitors from France, Germany, Ireland and the USA, which when combined account for 60% of business visits to the UK.



3.1.2. Types of New Money Flowing into a Host Economy

Spending by different stakeholders is an essential part of evaluating the economic contribution of meetings, as this represents spending that is “new money” injected into the economy (Figure 1).

Figure 1. Spending Categories in the Meeting Industry



Source: Adapted from Li, S. and Blake, A. (2009). “Estimating Olympic Related Investment and Expenditure”, *International Journal of Tourism Research*, 11(4): 337-356, and the USEIS report (2011).

The model identifies six types of new money flowing into the host economy from meetings. Stakeholders can be associated with spend and are matched here with the six categories in Figure 1.

- Type 1:** Spending on rental, planning and production - meeting host/organisers
- Type 2:** Spending on tourism-related activities - attendees and exhibitors (and their friends and families¹²)
- Type 3:** Spending on suppliers - venue managers
- Type 4:** Spending on exhibit displays - exhibitors
- Type 5:** Spending by governments and NGOs - governments and NGOs
- Type 6:** Spending on import leakage - relevant to most of the stakeholders

In order to estimate the total spending on meetings, researchers undertook surveys of the five key stakeholder groups.

In order to conduct an economic contribution evaluation of the meeting industry, it is important to understand the difference between tourists, business tourists and meeting attendees. The spending patterns of meeting attendees, the focus of this study, differ from tourists (or business tourists). Meeting attendees may well spend on tourism products, but also spend on meetings products, such as registration fees and other optional meeting programs. Spending on these meetings products may not be captured in tourism surveys and will more commonly be booked and paid for in advance of arrival by employers.

For each of the sample groups, the research used online surveys for industry contacts, members of associations, sponsors and DMOs. Delegate responses were collected through panel surveys. For panel surveys, Leeds Met worked with Maximiles, which is well-established in Europe and has extensive reach to more than 2.4 million qualified panellists, with 950,000 in the UK alone, and seven propriety panels across Europe, including the UK, France, Germany and Switzerland; and Lightspeed, which has some of the largest online research panels in the industry and has strategic partnerships that allowed broader access.

The study produced five survey schedules targeted at each sample identified. As Table 3 shows, five questionnaires captured specific information for each group. This ensured access to a breadth of complementary data.

Table 3. A Summary of Data Collected

SURVEY AUDIENCE	QUANTITATIVE DATA
Meeting host/organisers	The type of meeting (conference, exhibition, trade show or incentive), the total number of delegates, the number of delegates categorised by origin region/country, meeting length, expenditure on different supplies (venue hire, food and beverage, equipment, administration, advertising, keynote speaker and insurance) and revenue (registration fees, sponsorship, government and fees from exhibitors)
Venue managers	Number of meetings held, number of meetings under different categories (conference or exhibitions, small, medium or large), the total number of delegates, the number of delegates attending different types of meetings, seating capacity, building type (purpose built, unusual or unique venue, small hotel)
Governments and NGOs	Spend on supporting the meeting industry (advertising and promotion, subsidies), budget breakdowns and sources of revenue, changes in spending over recent years
Attendees (and their friends and family)	Number of accommodation nights for the meeting, number of extra nights for personal/professional reasons, the number of friends/family travelling with delegates, total spend in attending meetings
Exhibitors (and their friends and family)	Number of accommodation nights for the meeting, number of extra nights stayed, expenditures on the meeting (space rental, stand construction cost, equipment hire, electricity, advertising, hire of temporary staff, display material, freight), other expenditures on tourism-related products and services (accommodation, shopping, transport, food and beverage, entertainment, tours)

Following the UNWTO approach, the primary research captured revenues and spending of meeting organisations and venues. It does not include meeting suppliers such as security and catering, as these supply chain data are captured through the I-O modelling built on National Accounts.

3.1.3. Number of Questionnaires Received and Breakdown

Researchers developed a list of contacts for each survey using different databases, including Leeds Metropolitan University's database and contact lists provided by other stakeholders. To avoid sending the questionnaire several times to the same contact on different databases, all databases were sent to a clearinghouse to both protect data and eliminate duplicates. Researchers received a total

of 3,460 completed questionnaires. Of these, 3,350 responses provided data from 2011, and a further 110 responses were analysed from events in 2012¹³ (Table 4). Compared to existing studies (see Appendix 3), the UKEIS received favourable response numbers from the five stakeholder groups. The total number of questionnaires received from each group is shown in Table 4.

Table 4. Survey Responses Received from each Stakeholder Group

	SAMPLE SIZE	RECEIVED
Meeting Organisers	2,530	253
	Survey Panel	295
Venues	1,451	254
	Survey Panel	203
Destination Management Organisations	230	33
Attendees - Domestic	Survey Panel	1,174
	- International	Survey Panel
Exhibitors - Domestic	Survey Panel	255
	- International	Survey Panel
Live Event Attendees and Exhibitors ⁸	Survey Panel	110
TOTAL		3,460

3.1.4. Secondary Research

Secondary research was conducted for the following purposes.

- To enable researchers to estimate the population, such as the total number of meetings, meeting attendees and meetings venues, and sample sizes used by other lead agencies.
- To provide additional data to help estimate the input for the economic approaches, for example, the Tourism Satellite Account and National Accounts.
- To establish the approach based on the existing reports of the UNWTO and the approach of measuring the economic impact for the USA, Mexico and Canada.

3.2. The Evaluation of the Industry Economic Impact

3.2.1. Two Economic Approaches for this Study

One of the main purposes of the primary data collection and secondary research is to collect data that can be used to inform the two economic approaches—Meetings and Tourism Satellite Account (MTSA) and Input-Output modelling. MTSA can capture the direct contribution of meetings, but not the total economic impact, while I-O modelling can evaluate that total impact. Like tourism, strictly speaking, meetings do not form an industrial sector but “a form of final demand, which may involve the majority of sectors, such as accommodation, construction, entertainment, in an economy to a greater or lesser degree” and the output and employment of those sectors are dependent on meeting demands.¹⁴

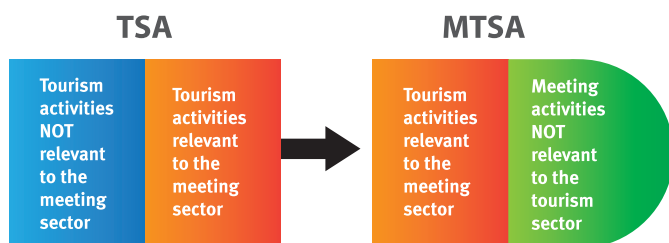
Table 5. Research Methods and Main Data Needed

RESEARCH METHODS	MAIN DATA/SOURCES NEEDED	PURPOSES
Primary data collection using different methods, such as online and interviews	Both quantitative and qualitative data regarding revenues, spending and motivations ¹⁵	Build the industry profile and evaluate the input, which can be fed into the MTSA and input-output modelling; Capture the economic profile of the industry
Secondary research	Existing reports of the economic consequences of meetings, economic and statistics reports/data, reports on meetings-related industries	Evaluate the size of the meeting industry in order to decide the population size; summarize and measure the impact of existing reports for the USA, Mexico and Canada.
Meetings and Tourism Satellite Account	Original Tourism Satellite Account	Evaluate the size of the meeting industry, the nature of demand and supply in the meeting industry, direct employment and the direct Gross Value Added contribution of meetings
Input-Output modelling	Input-Output tables	Evaluate total economic impacts of the meeting industry including the direct, indirect and induced economic impacts; estimate GDP

3.2.2. Meetings and Tourism Satellite Account

Based on the input from Phase 1, the team developed an Extended Tourism Satellite Account, which for the purposes of this project will be called the Meetings and Tourism Satellite Account (MTSA). This involved two tasks (Figure 2): Identifying and separating tourism activities/data including tourism demand, supply and commodities that are relevant to the meetings sector and collating data relating to other meetings activities, such as convention and trade show organisers, which are not identified in the original TSA (illustrated by the diagram below). The TSA provides detailed information on tourism in the economy, and can capture direct contributions. To capture total impact (direct + indirect + induced impact), the team employed I-O models.

Figure 2. Extend TSA to MTSA



In common with other satellite account approaches, notably for tourism, the critical outcome for the UK MTSA is an assessment of how much gross value add is directly dependent upon meetings and conference activities in the UK. (It includes some revenues from overseas meetings that accrue in the UK by international meetings managed by UK companies.) This estimate of Meetings GVA (MGVA) gives rise to the estimate of full-time equivalent (FTE) jobs directly supported by meetings.

Again following TSA approaches, researchers estimated this MGVA using a specific methodology and conceptual approach. For every commodity or product of interest, researchers estimated how much output was meetings-dependent—what percentage of output individuals or organisations purchased for the purposes of running or attending meetings or conferences (the meetings ratio). This ratio was then applied to the total GVA and employment of the most relevant industry to estimate meetings-dependent GVA and employment for that industry, and with the sum of all industries then representing direct meetings GVA and direct meetings-dependent employment for the UK.

To provide an example, assume that the output of the hotel industry in the UK was worth £100 billion and that the industry created £50 billion of GVA and directly employed 100,000 FTEs. If the estimate was that 50% of accommodation and hotel services were bought by those attending or organising meetings, the relevant totals for that industry would be £25 billion of GVA and 50,000 FTE jobs.

To estimate the direct GVA and employment using TSA approaches, researchers estimated the value of each commodity/product, the UK supply of that product and then the total UK demand from meetings activities. This was a complex task, with meetings activity typically hidden amongst a range of sectors in UK (and other) National Accounts. The surveys were of vital use in establishing both the spending patterns of the demand-side (attendees and accompanying persons) and activity on the supply side—meetings organisers and venues.

The survey data must fit within a wider economic framework, and here the work of the UK Tourism Intelligence Unit was invaluable. The TIU has published a number of Tourism Satellite Accounts for the UK that present the National Accounts according to definitions and sectors. The TSA used for this study is that for 2009 published by the Office for National Statistics (ONS).¹⁶ This was adjusted to represent a 2011 product supply.

Firstly, the supply for each commodity was updated to 2010 with reference to changes in the level of domestic supply between 2009 and 2010, as reported in the ONS UK Input-Output Supply & Use Tables.¹⁷ As no information is published on more changes in the relevant supply-side industries, the tables were updated to 2011 with reference to overall economy growth 2010-2011, as reported by ONS. At this stage the meeting industry reported by ONS within the TSA was replaced with the survey and secondary data-based estimates for the two stakeholder groups—meeting organisations and venues.

The above process was similarly undertaken to estimate employment by industry for 2011, with the 2009-based work of the TIU as a foundation, updated to 2011 with Business Register and Employment Survey (BRES) and other ONS datasets and then supplemented with the survey results of meeting organisations and venues.

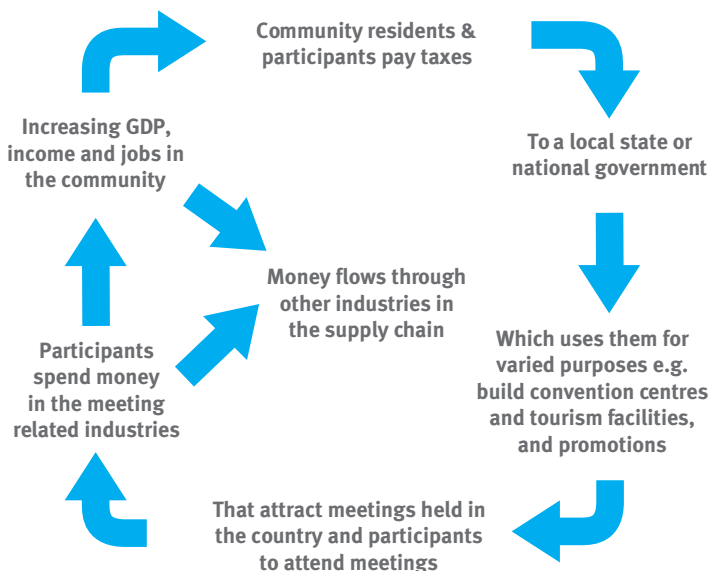
The demand side was largely provided by the extensive surveys undertaken and reported in the profile report, which enabled the estimate of the purchases of each commodity of interest by conference attendees and accompanying persons (UK resident and otherwise) in support of conferences held overseas (requiring UK inputs) and by exhibitors.¹⁸ (Summing the non-UK elements of this spend can be considered an indicator of the sector's importance as a driver of UK exports.)

Researchers then compared the total demand for each commodity from these originators to total supply to achieve the meetings ratio. There was, however, an interim step: ensuring matching prices. The supply side is reported in basic prices (net of taxes and distributor margins), whereas survey data are collected in purchaser prices, including VAT.¹⁹ The addition of taxes-less-subsidies and margins to the supply side and the removal of VAT from the demand figures enabled price matching. The direct GVA at the home countries, regional and city levels was estimated by considering the distribution of the volume and value of meetings organisations and venues across different regions.

3.2.3. Input-Output Modelling

Figure 3 illustrates the information that was collected through the input-output modelling in particular relation to direct, indirect and induced spending. Input-Output models trace successive rounds of demand, and the value add that is generated, throughout the economy as a result of expenditure on particular goods and services. The direct stage of impact refers to income generation (through labour earnings, profits and tax revenues) and employment that occurs in the firms that receive the revenue from the initial expenditure. The indirect stage of impact encompasses the income and employment generation in the chain of firms that supply products to those involved in the direct stage. As a result of both the direct and indirect stages of impact, households have higher incomes and employment, and hence will purchase other goods and services. The income and employment generated as a result of these purchases make up the induced stage.

Figure 3. The Circular Flow of Spending on Meetings



In seeking to conduct an economic impact assessment for a series of meetings, one of the fundamental inputs, irrespective of the evaluation technique used, is an estimate of the direct expenditure generated by the event. This is the new spending that occurs in the host destination by delegates that would not have occurred in the absence of these events. Whilst this is a very straightforward concept, failure to adhere to data collection methods consistent with this concept has led to grossly misinformed studies.

The new spending in the host destination that is generated by the event and would not have occurred in the absence of the event is known as direct inscope expenditure.²⁰ The direct expenditure includes not only expenditure by event attendees, but also by event organisers in operating the event and from sponsors contributing funds from outside the host region, and in the case

of meetings, other types of expenditure such as equipment rental, planning and production.

The direct expenditure of an event is not the same as the economic impact of an event, which is normally measured by Gross Domestic Product (GDP), household income and employment, although some studies may use the terms interchangeably. An increase in direct expenditure may not necessarily bring an increase in GDP and income.²¹ However, the estimation of the economic impact is dependent on the statistics of the direct expenditure. Having estimated the total direct inscope expenditure generated by a major event, the next step was to feed the data into the model and estimate the total economic impact of the event.²²

4. UK MEETING INDUSTRY ACTIVITIES

4.1. Meeting Industry Profile

Most of the tables presented in this section are from the UKEIS profile report. Some of the key findings from that profile report are detailed below.

In 2011, the UK hosted an estimated 1,301,600 meetings. Table 6 shows the number and percentage of meetings by home country, English region and city. Most (86%) took place in England, 6.6% in Scotland, 5.8% in Wales and 1.6% in Northern Ireland. Within England, the Greater London region hosted the most meetings (362,500), followed by the South East (163,349) and the West Midlands (143,210).

Table 6. Meeting Volume by Home Country, English Region and City

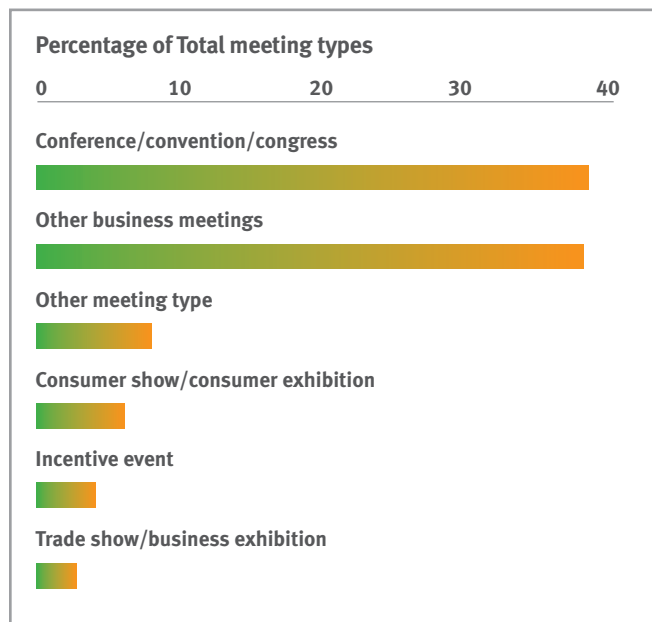
COUNTRY	MEETINGS	PER CENT
England	1,118,827	86.0
Scotland	86,524	6.6
Wales	75,802	5.8
Northern Ireland	20,447	1.6
TOTAL	1,301,600	100

ENGLAND BY REGION	MEETINGS	PER CENT IN ENGLAND
Greater London	362,500	32.4
East	78,318	7.0
South East	163,349	14.6
South West	74,961	6.7
East Midlands	55,941	5.0
West Midlands	143,210	12.8
Yorkshire and the Humber	89,506	8.0
North East	30,208	2.7
North West	120,833	10.8
TOTAL	1,118,827	100

CITY	MEETINGS	PER CENT OF HOME COUNTRY
London	362,500	32.4
Cardiff	47,376	62.5
Edinburgh	28,553	33
Belfast	14,436	70.6
Liverpool	19,020	1.7

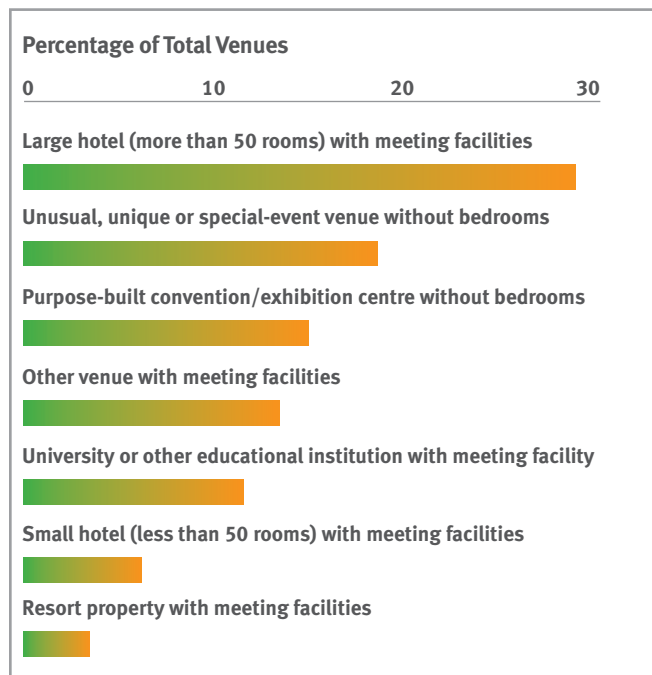
As Figure 4 shows, the majority of UK meetings in 2011 were conferences, conventions or congresses (38.9%) or another type of business meetings (38%). The remaining 23.1% were consumer shows or exhibitions, trade shows or business exhibitions, incentive events or other meeting types.

Figure 4. Proportion of Total Meetings by Type



The highest percentage of venues was large hotels (more than 50 rooms) with meeting facilities (27.7%). Almost a fifth of venues (19.8%) were unusual, unique or special-event venues. Purpose-built convention or exhibition centres made up 14.2% of the total number. Figure 5 shows the different venue types and the percentage of each found in the UK in 2011.

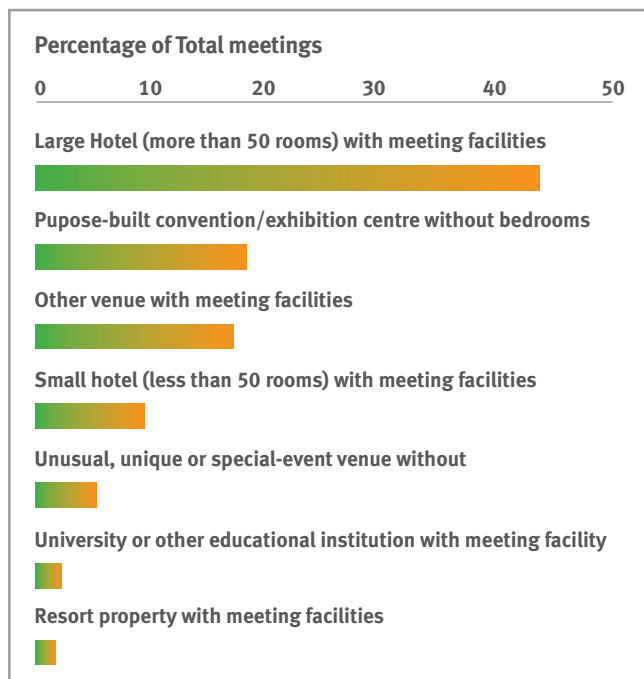
Figure 5. Proportion of Total Venues by Type



Large hotels with meeting facilities held all types of meetings, conferences, consumer shows, exhibitions and incentive events. More trade shows and business exhibitions were held in purpose-built convention and exhibition centres than in other types of venues. Small hotels hosted more incentive events. Resort properties, university/educational institutions and unique and special-event venues without bedrooms proved a popular choice for conferences.

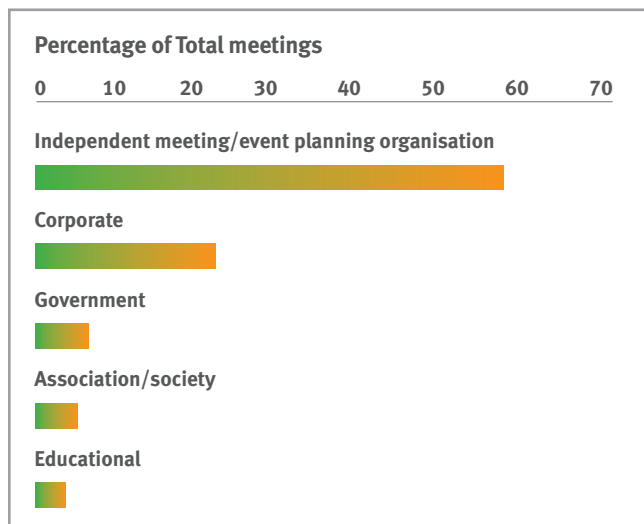
Figure 6 shows the percentage of meetings held in different types of UK venues in 2011. Large hotels with more than 50 rooms and meeting facilities hosted 43% of meetings. Almost a fifth (19.3%) of meetings were held in purpose-built convention or exhibition centres without bedrooms.

Figure 6. Proportion of Total Meetings by Venue Type



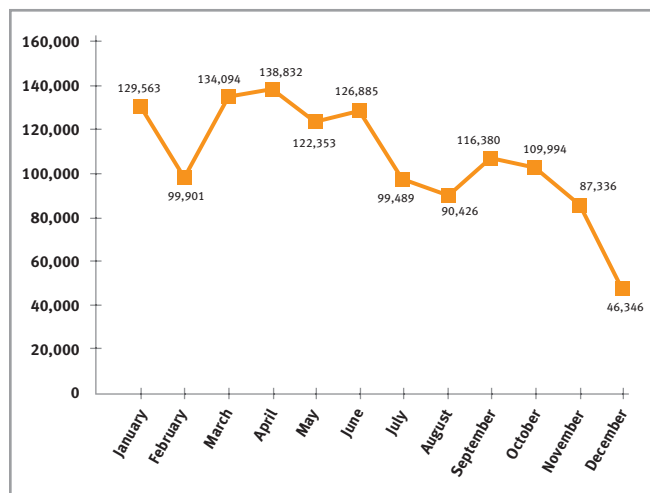
Independent meeting and event planning organisations hosted the majority of UK meetings in 2011 (59.4%), followed by corporate organisations (21.5%). Figure 7 shows the different categories of host organisations and the percentage of meetings held by each host.

Figure 7. Proportion of Total Meetings by Host Organisation



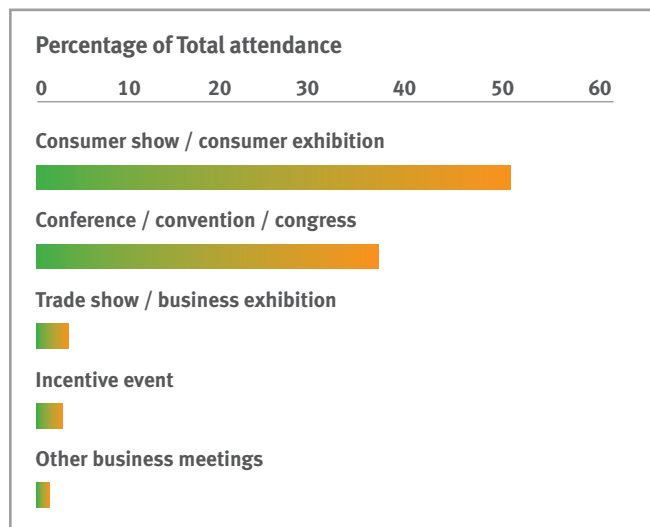
The average length of a meeting was two days. More than half (53.8%) of UK meetings in 2011 were a day or less in length. Figure 8 shows the number of meetings held per month in 2011. April attracted the highest number of meetings (138,832), while December attracted the lowest number (46,346).

Figure 8. Meeting Number by Month (2011)



The category with the highest number of attendees was consumer shows/consumer exhibitions, which accounted for 50.2% of the total number of attendees, followed by conferences, conventions and congresses, which attracted 38.7% of total attendees.

Figure 9. Proportion of Total Attendance by Meeting Type



UK meetings organisations and venues received £18.3 billion in 2011 by providing meeting services and products. Meetings organisations alone received £11 billion, of which £9.7 billion (88%) from hosting meetings inside the UK and £1.4 billion (12%) from hosting meetings outside the UK (Table 7). Meetings venues received £7.2 billion.

Table 7. Total Revenue for UK Meeting Organisations and Venues in 2011

	Meetings Organisations		Meetings Venues		TOTAL
	Hosting UK meetings	Hosting non-UK meetings	sub-total		
Total (£ millions)	9,708	1,374	11,082	7,187	18,269
Per cent	88%	12%	100%		

4.2.1. Spending Profile

Direct spend associated with meetings activities provides important data for evaluating the total economic contributions of meetings. It is defined as the money spent on meetings-related products and services in the UK. There are two types of direct spending, that associated with meeting attendees and that associated with direct meeting supplies, such as meeting organisations and venues. Spending and revenue profiles are captured based on estimations from primary data and benchmarks from secondary research, such as VisitBritain data and the USA and Canada EIS studies.

4.2.2. Direct Spending Associated with Meetings Attendees

Table 8 shows that the total direct spending associated with meeting attendees was estimated to be just under £40 billion,²³ with more than two thirds contributed by UK resident attendees and one third by attendees from the rest of the world (ROW). The entirety of this spending was not relevant to tourism spending, and 21% of the total was spent on meeting registration fees (including optional meeting programs). Among the spending categories relevant to tourism, meeting attendees spent the most on accommodation (22%) followed by food and beverages (10%) and air transport (9%).

Table 8. Attendee Spending

SPENDING CATEGORY (£, MILLION)	UK RESIDENT ATTENDEES	ROW ²⁴ RESIDENT ATTENDEES	TOTAL	%
Registration fee (including optional meeting programs)	6,220	2,052	8,272	21%
Accommodation	5,989	2,813	8,802	22%
Technology (internet, phone calls)	1,055	588	1,643	4%
Shopping (souvenirs, clothing, toiletries, groceries)	1,112	896	2,008	5%
Air transport	1,340	2,338	3,678	9%
Rail transport	1,797	532	2,329	6%
Local transport	1,226	658	1,884	5%
Car rental	542	308	850	2%
Petrol	1,226	252	1,478	4%
Other transport	542	350	892	2%
Travel services and tours	542	420	962	2%
Leisure events, entertainment and recreation	856	476	1,331	3%
Food and beverages (restaurants, cafés, bars)	2,624	1,400	4,023	10%
Other	1,312	322	1,634	4%
TOTAL	26,383	13,404	39,786	100%

Direct spending associated with meeting attendees includes not only spending by individual meetings attendees, but exhibitor operation spending for items such as floor space rental for exhibits and stand construction. The total of exhibitor operation spending was £1.7 billion (Table 9).

Table 9. Exhibitor Operation Spending

OPERATIONAL SPEND (£, MILLION)	AMOUNT	%
Floor space rental	358	21%
Stand construction cost (including drayage, onsite hauling)	221	13%
Equipment hires	91	5%
Electricity/lighting	76	4%
Communications/Internet	93	5%
Advertising/promotion	75	4%
Temporary staff	37	2%
Exhibit décor, display material	88	5%
Freight, exhibit shipment (to venue)	65	4%
Offsite events	60	4%
Sponsorship	117	7%
Other	422	25%
TOTAL	1,702	100%

This study calculates leakages based on data collected from the primary research. It is estimated that 39.7% of the total exhibitor operation spending (about £676 million) leaked from the UK economy, which means that 39.7% was spent on purchasing products and services from overseas suppliers.

4.2.3. Direct Spending Associated with Meeting Organisers

The total direct spending associated with UK meeting organisers was £24.7 billion in 2011 (Table 10). Of this spend, £6.4 billion was funded by registration fees paid by attendees. More than half of the direct spending was on venue hire, equipment and production, food and beverages and administration. The leakage of direct spending was about 7% (£1.7 billion), which was spent on purchasing goods from overseas companies.



Table 10. Direct Spending by Meeting Organisers

SPENDING CATEGORY	AMOUNT (£, MILLION)	%
Venue hire	4,052	16.5%
Food and beverages	2,848	11.6%
Equipment/production	3,115	12.7%
Technical costs	1,494	6.1%
Administration	2,454	10.0%
Advertising and promotion of	746	3.0%
keynote speakers/trainers and other sponsored attendee expenses	454	1.8%
Insurance	305	1.2%
Other facility costs	262	1.1%
Meeting management company/destination management company	155	0.6%
Printing	403	1.6%
Temporary staff agency	1,470	6.0%
Tour operator services	735	3.0%
Registration	142	0.6%
Company staff (food and beverages, travel, accommodation)	441	1.8%
Audiovisual and staging	1,445	5.9%
Entertainment/décor/gifts and awards	489	2.0%
Shipping	107	0.4%
Delegate materials (delegate bags, give-aways)	164	0.7%
Transportation	1,200	4.9%
Accommodation (organisation purposes only, non-delegate)	1,516	6.2%
Corporate social responsibility	40	0.2%
Maintenance and repairs	265	1.1%
Energy and other utilities	110	0.4%
Other	204	0.8%
TOTAL	24,616	100%

Table 11 displays meeting organiser spending on different types of meetings. Forty-three per cent of total spending was on hosting conferences, conventions and congresses, 18% was on other business meetings, and 13% was on trade shows and business exhibitions.

Table 11. Meeting Organiser Spend by Meeting Type

MEETING TYPE	TOTAL SPEND (£, MILLION)	%
Conference/convention/congress	10,610	43%
Consumer show/exhibition	2,289	9%
Trade show/business exhibition	3,299	13%
Incentive event	2,412	10%
Other business meetings	4,431	18%
Other meeting type	1,575	6%
TOTAL	24,616	100%

4.2.4. Total Direct Spend on Meeting Activities

Table 12 lists a summary total of direct meeting spending by meeting attendees, exhibitor operations and meeting organisers. A total direct spend of £60 billion was on UK meetings activities in 2011. The majority of spending (67%) was contributed by meeting attendees. Registration fees have been included in both types of spending—by attendees and organisations, which means this has been counted twice. To avoid double counting, the registration fees paid by attendees were excluded from the meeting spend calculation, which resulted in a reduction of the total spend of meeting organisers to £18 billion.

Table 12. Total Direct Spending on Meeting Activities

SPENDING CATEGORY	TOTAL SPENDING (£, MILLION)	%
Attendee	39,786	67%
Exhibitor operation	1,702	3%
Meeting suppliers	18,164	30%
TOTAL	59,652	100%

5. TOTAL ECONOMIC CONTRIBUTION OF THE MEETING INDUSTRY

5.1. Direct Gross Value Added and Employment Contribution

5.1.1. Direct Gross Value Added by Meetings Activities

According to the definition used by ONS, Gross Value Added (GVA) can be used to measure the contribution to the economy of each individual producer, industry or sector. In total, the direct GVA generated by meetings activities was £20.6 billion in the UK in 2011 (Table 13). Among tourism-related industries, accommodation services for meetings attendees generated direct GVA of £3.7 billion. Meetings organisations generated £3.4 billion of direct GVA and meetings venues generated £2.2 billion. Other industries outside of tourism and meetings industries, such as printing, fuel, construction and retail distribution, which are classified as other consumption products, contributed 28% of the total direct GVA of meetings activities.

Table 13. Direct Gross Value Added Generated by Meetings Activities

INDUSTRIES	DIRECT MEETING GVA (£, MILLION)
Tourism related industries	
Accommodation for visitors	3,738
Food and beverage serving	1,671
Railway passenger transport	899
Road passenger transport	700
Water passenger transport	101
Air passenger transport	692
Transport equipment rental	210
Travel and other reservation agencies	633
Sport, recreation and culture activities	588
Meetings-specific industries	
Meetings organisations	3,449
Meetings venues	2,220
Other consumption	5,737
TOTAL	20,639

5.1.2. Direct Meeting GVA by Country, Region and City

Table 14 shows a breakdown of direct GVA by country, region and city. Meetings activities in England contributed to the majority of direct meeting GVA (£17.5 billion). Five regions in England, namely, Greater London (£5.6 billion), South East (£2.7 billion), West Midlands (£2.2 billion), North West (£1.9 billion) and Yorkshire and the Humber (£1.4 billion) account for almost 80% of the total meeting GVA of England.

Table 14. Direct Gross Value Added Generated by Meetings Activities by Location

LOCATION	DIRECT MEETINGS GVA (£, MILLION)
Country	
England	17,544
Scotland	1,919
Wales	908
Northern Ireland	268
Total (United Kingdom)	20,639
Regions in England	
Greater London	5,643
East	1,211
South East	2,705
South West	1,139
East Midlands	944
West Midlands	2,179
Yorkshire and the Humber	1,437
North East	421
North West	1,866
Total England	17,544
City	
London	5,643
Cardiff	587
Edinburgh	601
Belfast	128
Liverpool	289

5.1.3. Comparison of Direct GVA Contribution with Other Industries

Table 15 displays a list of direct GVA contributions by different sectors. Apart from the meeting industry, which is not included in the national account, the UK economy has been classified into 110 sectors on the Supply and Use Tables published by the Office for National Statistics (ONS). The total GVA generated by all sectors was £1,316 billion, and GVA generated by the meetings industry (£20.6 billion) accounts for 1.6% of that total. Compared to other sectors, the meeting industry is ranked in the top 20 of all industries.²⁵

Table 15. Direct GVA Contribution by Different Sectors

INDUSTRY	ESTIMATED GVA IN 2011 PRICES (£, MILLION)
Education services	87,811
Financial services, except insurance and pension funding	83,989
Human health services	73,450
Retail trade services, except of motor vehicles and motorcycles	70,193
Public administration and defence services; compulsory social security services	69,442
Owner-occupiers' housing services	67,424
Wholesale trade services, except of motor vehicles and motorcycles	53,440
Specialised construction works	33,807
Buildings and building construction works	33,548
Real estate services, excluding on a fee or contract basis and imputed rent	33,334
Computer programming, consultancy and related services	28,198
Food and beverage serving services	28,071
Extraction of crude petroleum and natural gas & mining of metal ores	26,422
Insurance and reinsurance, except compulsory social security & pension funding	22,813
Wholesale and retail trade and repair services of motor vehicles and motorcycles	22,700
Telecommunications services	21,911
Meeting industry	20,639
Architectural and engineering services; technical testing and analysis services	20,451
Land transport services and transport services via pipelines, excluding rail transport	19,751
Services of head offices; management consulting services	18,751
Legal services	18,513
Employment services	17,273
Warehousing and support services for transportation	16,912
Services auxiliary to financial services and insurance services	16,466
Constructions and construction works for civil engineering	16,091
Electricity, transmission and distribution	15,639
Residential care services	15,487
Social work services without accommodation	15,326
Office administrative, office support and other business support services	15,118
Fabricated metal products, excl. machinery and equipment and weapons & ammunition	13,696
Accounting, bookkeeping and auditing services; tax consulting services	13,603

INDUSTRY	ESTIMATED GVA IN 2011 PRICES (£, MILLION)
Basic pharmaceutical products and pharmaceutical preparations	12,428
Rental and leasing services	12,415
Accommodation services	11,566
Machinery and equipment	10,865
Publishing services	10,476
Advertising and market research services	10,358
Computer, electronic and optical products	9,709
Sports services and amusement and recreation services	8,499
Postal and courier services	8,295
Services furnished by membership organisations	8,016
Waste collection, treatment and disposal services; materials recovery services	7,722
Products of agriculture, hunting and related services	7,639
Other personal services	7,572
Printing and recording services	7,452
Other professional, scientific and technical services	6,965
Services to buildings and landscape	6,745
Other food products	6,112
Programming and broadcasting services	6,085
Services of households as employers of domestic personnel	5,949

5.1.4. Direct Employment Impact by Meeting Industry

Employment impact is shown by full-time equivalent (FTE) jobs. The total number of full-time equivalent (FTE) jobs directly created by meetings activities was 423,445 (Table 16) in 2011. Among tourism-related industries, meetings activities supported 133,228 FTE jobs in accommodation services for visitors, whilst there were 14,755 FTEs in meetings organisations and 18,399 FTEs in meetings venues. Tourism-related and meetings-specific industries together account for 79% of direct FTEs secured from meetings.

Table 16. The Number of Direct Meetings Full-time Equivalent Jobs

INDUSTRIES	DIRECT FTES
Tourism related industries	
Accommodation for visitors	133,228
Food and beverage serving	54,607
Railway passenger transport	15,585
Road passenger transport	45,951
Water passenger transport	273
Air passenger transport	6,605
Transport equipment rental	1,772
Travel/reservation agencies	15,711
Sport, recreation and culture activities	25,025
Meetings-specific industries	
Meetings organisations	14,755
Meetings venues	18,399
Other consumption products	87,006
TOTAL	423,445

5.2. Direct, Indirect and Induced Economic Impact of Meetings

This section presents the total economic impact of meetings on Gross Domestic Product (GDP), industry output, employment, labour income, tax revenues and imports. These economic impacts are generated from the UK I-O modelling.

5.2.1. Gross Domestic Product (GDP)

GDP is a key economic indicator that measures the total market value of goods and services produced by the economy. GDP is closely linked to GVA in that GDP equals GVA plus taxes and minus subsidies on products. Meetings activities contributed £58.4 billion of total GDP impact to the economy in 2011, with 80% contributed by direct and indirect impact (Table 17). The total GDP impact generated by meetings activities accounts for about 2.9% of the whole UK economy's GDP.

Table 17. Direct, Indirect and Induced Impact on GD

	GROSS DOMESTIC PRODUCT (£, MILLION)	%
Direct impact	22,545	39%
Indirect impact	24,438	42%
Induced impact	11,460	20%
TOTAL ECONOMIC IMPACT	58,443	100%

5.2.2. Industry Output

Another indicator used to show the economic contribution of economic activities is industry output, which measures the total amount of output from all industries. The total industry output generated by meetings activities in the UK in 2011 was £128.2 billion (Table 18). This is much larger than the total GDP impact. To calculate the industry output of providing air transport services to meetings attendees, the data need to include the cost of inputs such as fuel and service charges as well as the value of final output, which is the cost of airline tickets. As the ticket cost already includes the cost of fuel and services, the inputs part has been counted twice. Therefore, industry output differs from GDP in that the former double-counts the value of inputs for the production of any services and products.

Table 18. Direct, Indirect and Induced Impact of Industry Output

	INDUSTRY OUTPUT (£, MILLION)	%
Direct impact	59,653	47%
Indirect impact	50,115	39%
Induced impact	18,426	14%
TOTAL ECONOMIC IMPACT	128,194	100%

5.2.3. Employment (FTEs)

In 2011, meetings activities directly generated more than 423,000 FTEs and indirectly generated more than 427,000 FTEs, which together account for 84% of total employment impacts (Table 19). The total employment impact as a result of meetings activities was more than 1 million FTEs across the economy.

Table 19. Direct, Indirect and Induced Impact – Employment

	EMPLOYMENT (NUMBER)	%
Direct impact	423,445	42%
Indirect impact	427,113	42%
Induced impact	165,836	16%
TOTAL ECONOMIC IMPACT	1,016,394	100%

5.2.4. Wages and Salaries

Wages and salaries measure compensation of employees before deduction of tax and national insurance and after deduction of employer national insurance contributions. Meetings activities benefited UK employees by £25.7 billion in wages and salaries in 2011 (Table 20). Employees who worked directly for meetings organisations earned £8.7 billion, and those who worked indirectly for meetings earned £12.8 billion.

Table 20. Direct, Indirect and Induced Impact on Wages and Salaries

	WAGES AND SALARIES (£, MILLION)	%
Direct impact	8,660	34%
Indirect impact	12,774	50%
Induced impact	4,241	17%
TOTAL ECONOMIC IMPACT	25,675	100%

5.2.5. Tax Revenues

Meetings activities in the UK contributed a total of £21 billion to government tax revenues (Table 21). This accounts for about 3.6% of total UK tax revenues in 2011. The direct contribution of tax revenues from meetings was £7.3 billion, and the indirect contribution was £8.7 billion.

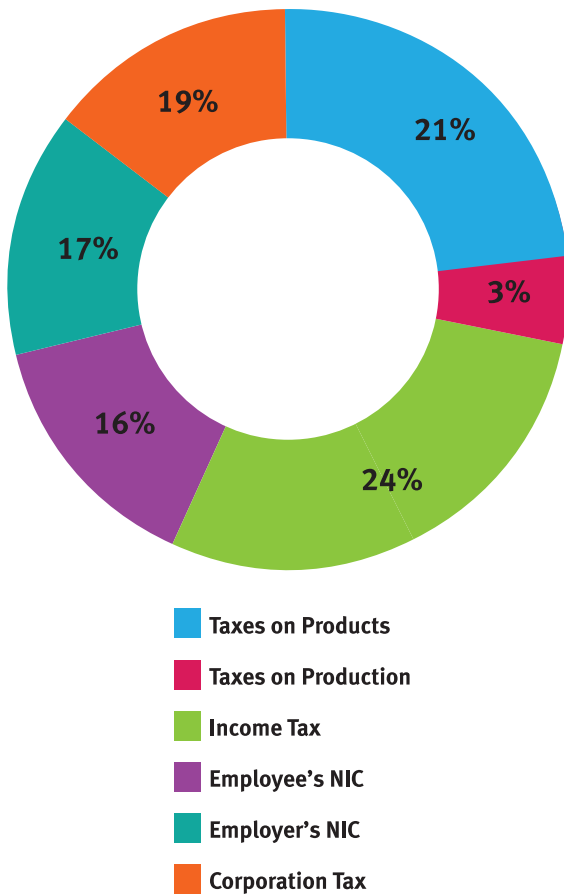
The direct, indirect and induced impacts of six categories—taxes on products (mainly VAT and excise duties), taxes on production (mainly business rates), income tax, corporation tax and employee and employer national insurance contributions—brought by meetings activities are presented in Table 21.

Table 21. Direct, Indirect and Induced Impact on Tax Revenues

£, MILLIONS	DIRECT IMPACT	INDIRECT IMPACT	INDUCED IMPACT	TOTAL ECONOMIC IMPACT	%
Taxes on products	1,907	511	1,975	4,392	21%
Taxes on production	280	227	156	664	3%
Income tax	1,732	2,555	848	5,135	24%
Employee NIC	1,126	1,661	551	3,338	16%
Employer NIC	1,181	1,742	578	3,501	17%
Corporation tax	1,052	2,021	992	4,064	19%
TOTAL TAX REVENUE	7,277	8,716	5,101	21,094	100%

Figure 10 illustrates the percentage of total economic impact of different taxes contributed by meetings activities. The contributions to income tax, taxes on products and corporation taxes account for more than 60% of the total economic impact of tax revenues.

Figure 10. The Composition of Total Contributions to Different Taxes



5.2.6. Imports

To assess economic leakage, researchers evaluated the proportion of activity that required imports.²⁶ By purchasing products from suppliers outside the UK for meetings in the UK, the total import impacts generated were just under £16.1 billion (Table 22). There were £8.7 billion of direct import leakages and £7.3 billion of indirect and induced import leakages generated as a result of meetings.

Table 22. Direct, Indirect and Induced Impact on Imports

	IMPORTS (£, MILLION)	%
Direct impact	8,720	54%
Indirect impact	3,950	25%
Induced impact	3,398	21%
TOTAL ECONOMIC IMPACT	16,067	100%

6. CONCLUSIONS

6.1. The Importance of the Meeting Industry in the UK

To acquire a better knowledge of the overall scope and broader economic contributions of the meeting industry and its associated activities, researchers collected responses from five stakeholder groups representing both the demand and supply sides of the sector as well as a wide variety of meetings and venue types and domestic and international attendees and exhibitors. The meeting industry is closely linked to other industries, in particular tourism-related industries, and also indirectly supports a number of other non-tourism industries. Meetings contributed £58.7 billion to the UK GDP and generated 1 million FTEs across various industries. This contribution puts the meeting industry in 17th place amongst all industry sectors in the UK and highlights its significance as well as the critical role it plays in supporting the UK economy.

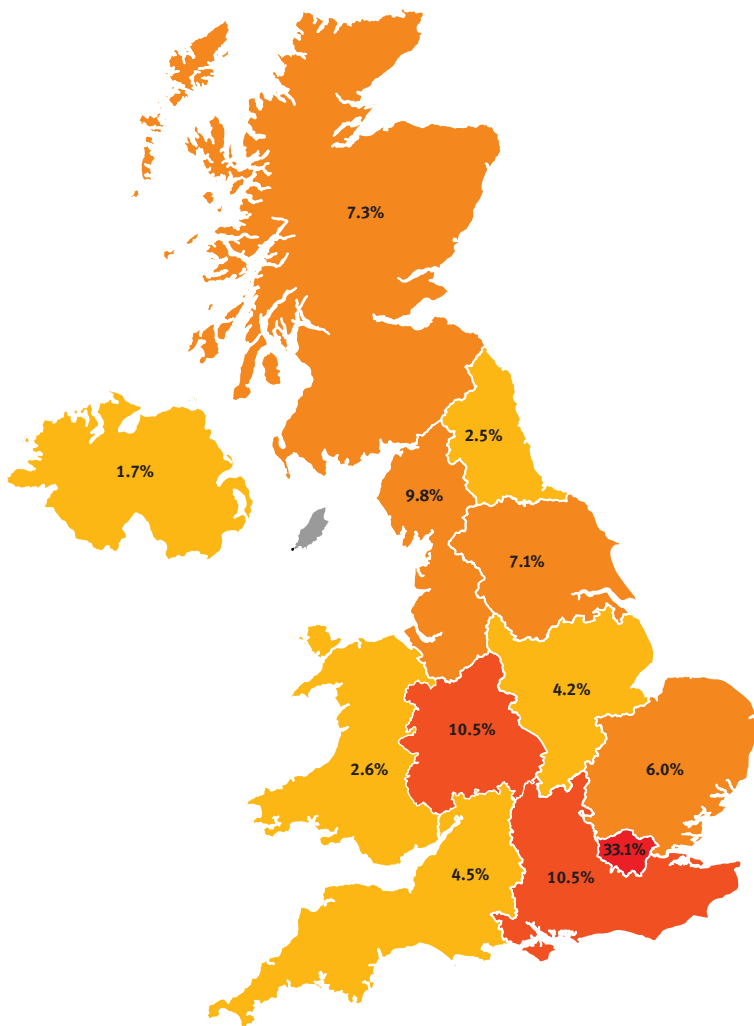
- Figure includes attendee spend plus accompanying people spend.
- Jones, C.; Munday, M.; and Beynon, M. (2009) "The embeddedness of tourism-related activity: a regional analysis of sectoral linkages," *Urban Studies* (3).
- UNWTO, *Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension* (November 2006).
- The Economic Significance of Meetings to the U.S. Economy*, prepared by PricewaterhouseCoopers LLP, January 2011.
- The Economic Significance of Meetings to Mexico*, prepared by PricewaterhouseCoopers LLP, September 2011.
- The Economic Contribution of Meetings Activity in Canada*, prepared by Maritz Research Canada and The Conference Board of Canada, June 2008.
- The non-spending profile of the meeting industry has been presented in a separate report. Therefore, only the key points are summarised in this final report. Please refer to the profile report for more details.
- Frechtling, D. (2009). "The tourism satellite account: A primer." *Annals of Tourism Research*. 37 (1): 136 –153.
- UNWTO *Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension* (November 2006).
- Although this study was undertaken prior to the release of the UNWTO report in 2006, it uses the same method proposed by UNWTO, as the same authors wrote it.
- This includes accompanying persons.
- Beaverstock, J., Derudder, F. & Witlox, F. (2010) *International Business Travel in the Global Economy*, Farnham: Ashgate Publishing Limited. Friends and family were included in this study for their spend during stays for delegates, and also for longer periods following meetings. This aspect is worthwhile, as people increasingly try to blend personal and professional activities, and in particular, as business travellers tend to spend more than leisure visitors.
- This UKEIS was conducted in 2012 and estimated the economic impact for 2011. However, to verify the 2011 estimation, data were also checked against data collected for 2012 live events.
- Jones, C.; Munday, M.; and Beynon, M. (2009) "The embeddedness of tourism-related activity: a regional analysis of sectoral linkages," *Urban Studies*, 49 (3).
- The qualitative data are to be used for a how-to guide for the industry to enhance economic impact practices.
- <http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Economic+Value+of+Tourism>
- <http://www.statistics.gov.uk/hub/economy/national-accounts/supply-and-use-tables/index.html>
- Following TSA convention on agency services and margins, this research reports organiser spend on accommodation and other services as part of demand, and hence direct impact. An adjustment was made to avoid double-counting indirect impacts.
- The industry must also account for the possibility that non-UK supply is used to service UK demand and include an adjustment column, although here, for our meetings commodities, this is largely not relevant.
- Jago, L. and Dwyer, L. (2006). *Economic evaluation of special events: A practitioner's guide*, Altona, Vic.: Common Ground Publishing.
- Matheson, V. (2009). "Economic multipliers and mega-event analysis," *International Journal of Sport Finance*, 4: 63-70.
- Li, S.N. and Jago, L. (forthcoming). "Evaluating economic impact of major sports events—a meta analysis of the key trends," *Current Issues in Tourism*, forthcoming.
- This includes spending by people who accompany meetings attendees.
- ROW: Rest of the world.
- The latest GVA figures for 2011 will be published in July 2013 by ONS. Please note that the rank of the meetings industry may change when the latest figures are published. These figures are estimated by taking GVA by industry in 2010 and multiplying up by current price growth rates by broad industry group.
- This study captures products purchased from suppliers outside the UK by meetings organisations and venues in the UK, but does not capture the imported services and products purchased by meetings attendees due to relevant data not being available.

APPENDICES

Appendix 1. Comparison of National Economic Contribution Studies

DIMENSION	NATIONAL BUSINESS EVENTS STUDY	THE ECONOMIC CONTRIBUTION OF MEETINGS ACTIVITY IN CANADA	THE ECONOMIC SIGNIFICANCE OF MEETINGS TO THE US ECONOMY	THE ECONOMIC SIGNIFICANCE OF MEETINGS TO MEXICO	THE ECONOMIC CONTRIBUTION OF MEETING ACTIVITY IN DENMARK	THE ECONOMIC IMPACT OF THE UK MEETING INDUSTRY
Country	Australia	Canada	United States of America	Mexico	Denmark	UK
Year of evaluation	2002	2006	2009	2010	2010	2011
UNWTO Method	Underpinned the UNWTO method	Yes	Yes	Yes	Yes	Yes
Venues	Sample of 531 from a population of 1,620, all meeting types across a full year	Sample of 220 from a sample of 1,517, surveyed six meeting types	Sample of 440 from a sample of 6,000	Sample of 66 from a sample of 314	Sample of 383 from a sample of 692	457 responses from a sample of 1,451 and online panel survey
Delegates	Intercept interviews with 6,668 at events	1,520 from online panels, asked about one to two meetings over the last year	2,550 from online panels, asked about one to two meetings over the last year	Sample size unclear, online survey panel	881 out of the 4,294 interviewed as part of Visit Denmark's Tourism Survey, day delegate data obtained through another survey	1,617 total responses from online panel surveys, 1,174 domestic and 443 international
Conference Organisers	161 at events	Sample of 284 from a population of 12,153 (in-house and independent)	Sample of 2,700 from a population of 20,000, asked about one meeting over the last year.	Sample of 297 from a population of 10,533, asked about one meeting over the last year	Sample of 223 from a population of 1,443	21%
	548 responses from a sample of 2,530 and online panel survey	227	156	664	3%	3%
Exhibitors	843 at events	Sample of 58 from a sample of 3,127, asked about 1-2 meetings over the last year	Sample of 260 from a sample of 6,500, asked about 1 meeting over the last year	N/A	N/A	695 total responses from online panel surveys, 255 domestic and 440 international
Incentive Organisers (ITOs, DMOs & Accom providers)	Sample of 51 from a sample of 257, asked about their last event.	N/A	Sample of 110 from a sample of 500	3,338	16%	16%
	Sample of 25 from a sample of 58	1,742	578	3,501	17%	17%
	N/A	33 responses from a sample of 230	1,975	4,392	21%	21%
Speakers	N/A	Sample of 11 from a sample of 537, asked about one to two meetings over the last year	N/A	N/A	N/A	N/A
Live event attendees and exhibitors	N/A	N/A	N/A	N/A	N/A	110 responses from online panel surveys
Number of Events	316K	671K	1.8M	197.4K	187.9K	1.3M
Number of Attendees	28.4M	70.2M	204.7M	23.1M	6.9M	116.1M
Direct Expenditure	AUD\$17.4B	CAD\$32.2B	US\$263.4B	US\$18.1B	DKK20.8B	£59.7B
Total Output (including indirect & induced)	N/A	CAD\$71.1B	US\$907.2B	US\$32.5B	N/A	£128.2B
Direct Contribution to Value Added	AUD\$6.1B	N/A	N/A	N/A	DKK8.5B	£20.6B
Total Contribution to Value Added	AUD\$11.3B	N/A	N/A	N/A	DKK15.3B	N/A
Direct Contribution to GDP	N/A	CAD\$11.3B	US\$457.9B	US\$12.1B	N/A	£22.5B
Total Contribution to GDP (including indirect & induced)	N/A	CAD\$33.7B	US\$106.1B	US\$25.1B	N/A	£58.4B
Total Taxes Generated	N/A	CAD\$14.6B	US\$109.8B	N/A	DKK7.8B	£21.1B
Direct Contribution to Employment	115.6K	235.5K	1.65M	441.3K	25.8K	423.4K
Total Contribution to Employment (including indirect & induced)	213.8K	583.2K	6.3M	783.7K	37.9K	1M
Estimates Provided by State or Province	Yes	No	No	No	No	Yes (by regions)

Appendix 2. Geographical Distribution of Survey Responses Within the UK



Appendix 3. Economic Modelling

The Input-Output model provides estimates of the additional economic activity (sales, GDP and employment) that is generated by purchases of goods and services. This research uses the latest UK Input-Output model (published in 2011 by the Office for National Statistics), employment rates and wages for 2011 (from the ONS survey of hours and earnings for 2011), tax rates from 2011 (from HM Revenue and Customs) and an estimate of the marginal propensity to consume in the UK (from the Bank of England).

The Input-Output table determines how much of each input is needed to produce £1 of each output, containing data on the inputs used by 123 industries in the UK for each of 123 products. It also has data on GDP and the GDP generated in the production of each product. Input-Output multipliers are derived from this table for the following levels of economic effects.

- **Direct multipliers** show the GDP and employment generated in the meeting industry, and in other firms from which meeting attendees purchase goods and services. A meeting organiser is part of direct employment, and his or her income is part of direct GDP. Similarly, a worker at a hotel where event participants stay is part of the direct employment, and such incomes are part of direct GDP.

- Indirect multipliers demonstrate the benefits from spending spread beyond the firms in which purchases are made, as these firms purchase products from other firms, which purchase products from other firms, and so on through an entire supply chain. Jobs and incomes generated in this supply chain are the indirect effects of the initial spending and occur in a wide variety of industries around the UK.
- Induced multipliers measure the effects of spending and re-spending of disposable household income generated by the direct and indirect impacts. When a meeting organiser, or someone working in the meeting industry supply chain, has an income because of meetings, they spend part of that income. Every product they purchase has its own supply chain in which jobs and income are generated, and every job and pound of income generated this way also has a further induced effect.

Direct multipliers have been calculated in this study based on secondary data including employment rates and wages for 2011 (from the ONS survey of hours and earnings for 2011), tax rates in 2011 (from HM Revenue and Customs) and an estimate of the marginal propensity to consume in the UK (from the Bank of England). The indirect multipliers and induced multipliers are derived from the Input-Output model. This takes the demand for products that are involved in staging an event, and those purchased by event delegates, and determines the resulting demands throughout the supply chains that support them. Through this input-output model, the indirect effects on sales, GDP and employment are calculated.

Induced multipliers are also derived through the Input-Output model, with additional data on marginal tax rates and the marginal propensity to consume (which is the proportion of any additional income that will be consumed).

Employment effects in the Input-Output model are determined by taking data on average hours worked and gross wages for each industry and the resulting wage rate for a standard 37.5-hour week to determine the number of full-time equivalent jobs supported by every £1 million of wages and salary spending by each industry. The additional wages and salaries earned producing each product are derived from additional spending as part of the Input-Output model, allowing the calculation of full-time equivalent employment.

The resulting set of multipliers allows the specification of demand, and will derive the indirect and induced demands for products as well as the impacts for GDP and employment. It will also give tax revenues at the indirect and induced stages for

- **Taxes (less subsidies) on production.** This is typically small in the UK, as it comprises mainly business rates.
- **Taxes (less subsidies) on products, which includes VAT, excise duties and other indirect taxation.** VAT is included, firstly in that induced spending on products is subject to VAT where households are purchasing products, and secondly because there are some small VAT payments on intermediate products included in the Input-Output table, where, for example, small firms below the VAT threshold pay VAT on their inputs.
- **Income tax.** All labour income is taxed at the marginal rate of 20% in the input-output model, whether that income is earned in the indirect or the induced stages. The majority of income earners face a marginal tax rate of 20%, although some face higher rates.
- **Employees' national insurance contributions are paid at 13% on all labour income.** As with income tax, while there are different rates and allowances, the majority of income earners face a rate of 13% on additional income.

- Employers' national insurance contributions are also paid at a variety of different rates. In the Input-Output model, a rate of 12% is applied, corresponding to the main rate paid on most income.
- Corporation tax. Corporation tax is applied at 22%, being an average of the main rate (24% in 2011) and the small firm rate (20%).

The relationship between gross value added (GVA), compensation of employees (COE) and gross operating surplus (GOS) is:

- $GVA = COE + GOS + \text{taxes less subsidies on production.}$

The relationship between gross domestic product and GVA is:

- $GDP = GVA + \text{taxes less subsidies on products.}$

The remaining taxes (income tax, national insurance contributions and corporation tax) are direct taxes paid on income. This can be shown as:

- $\text{Wages and salaries} = COE - \text{employer national insurance contributions.}$
- $\text{Net labour income} = \text{Wages and salaries} - \text{income tax} - \text{employee national insurance contributions.}$
- $\text{Net capital income} = GOS - \text{corporation tax.}$
- $\text{Household disposable income} = \text{Net labour income} + \text{net capital income.}$

Changes to household disposable income that accrue from direct and indirect stages are used as the starting point in calculating induced impacts, with the marginal propensity to consume (MPC) determining how much of each additional unit of income is consumed.

- $\text{Change in consumption} = MPC \times \text{change in household disposable income.}$

Any change to consumption is broken down into VAT payments, imports and domestic consumption of each product, from which the impacts are derived. Additional household disposable income that results from this calculation once again leads to further changes in consumption, which have further impacts. The resulting changes are all summed together to give the induced impacts.

Appendix 4. A Comparison of Data Used in Comparable Studies

	CANADIAN REPORT	US REPORT	MEXICAN REPORT	UK REPORT
Title	The Economic Contribution of Meetings Activity in Canada	The Economic Significance of Meetings to the US Economy	The Economic Significance of Meetings to Mexico	The Economic Impact of the UK Meeting and Event Industry
Data collection	2006	2009	2010	2011
Responses received	220 venues 284 meeting organisers 58 exhibitors 11 speakers 1,520 delegates Total 2,093	440 venues 2,700 meeting organisers 110 DMOs 260 exhibitors 2,550 delegates Total 6,060	66 venues 297 meeting organisers 25 DMOs Total 388	457 venues 548 meeting organisers 33 DMOs 695 exhibitors 1617 delegates 110 live exhibitors and attendees Total 3,460

Appendix 5. Acknowledgements

The research team is pleased to acknowledge the support of the following organisations for sponsoring this important study.

- Barbican
- Condé Nast
- ExCel London
- IMEX Group
- InterContinental Hotels Group (IHG)
- International Confex
- International Congress and Convention Association (ICCA)
- London & Partners
- Meetings & Incentive Travel
- MPI Foundation
- Q Hotels
- Reed Travel Exhibitions
- Scottish Exhibition and Conference Centre (SECC)
- Site International Foundation
- The Meetings Show UK
- Visit Scotland
- Visit Wales

The research team is pleased to acknowledge the contribution of the following organisations for their support in distributing questionnaires to their constituents.

- Association of British Professional Conference Organisers (ABPCO)
- Belfast Visitor & Convention Bureau
- Cardiff & Co
- Conference and Travel (CAT) Publications
- Confex/UBM
- Edinburgh Convention Bureau
- Edinburgh International Conference Centre
- Emergency Planning College
- Experian
- The World Exhibition for Incentive Travel, Meetings & Events (IMEX) Group
- InterContinental Hotels Group (IHG)
- Leeds and Partners
- Leeds Metropolitan University
- Leicester Shire Promotions
- London & Partners
- Meetings Industry Association (MIA)
- Meeting Professionals International (MPI)
- Q Hotels
- Site International Foundation
- Tony Rogers Conference & Event Services
- Visit England
- Visit Scotland
- Visit Wales

Secondary data were kindly supplied by the following organisations.

- *FaceTime*, report co-founded by the Association of Event Organisers (AEO), the Association of Event Venues (AEV) and the Event Supplier and Services Association (ESSA)
- Meetings Industry Association (MIA)
- Visit England

The research team thanks the following organisations that took the time to be part of this study. Their insights are greatly appreciated. Not all participants are included, only those who opted to be acknowledged.

- Abbey Mount Centre
- Action for Children
- ADITVAM
- AFO
- Agilysis
- AGORA Occasions, Inc.
- aps Ltd
- Association of British Philatelic Societies
- At-Bristol
- Athena Meetings & Events
- ATT
- B2B Event Management
- Banks Sadler
- Barbican Centre
- Barnett Hill - A Sundial Group Venue
- Bath Tourism Plus
- Beardmore Hotel & Conference Centre
- Best Western Chilworth Manor, Southampton
- BioCity Nottingham
- Blue Funnel Cruises Ltd.
- Book Me A Room
- BP
- Brintex Events
- Build Up
- Bury Venues
- Business Meetings Malta
- BVG Group
- C. L. Initiatives Ltd.
- Capital 1
- Cardiff Convention Bureau
- Church House Conference Centre
- CIP
- Citizen Leaders CIC
- Cluny Events, Fife
- Conference Resource Limited
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- Crowne Plaza Manchester Airport
- D H Lawrence Heritage Centre
- Darent Valley Hospital
- Denham Court Farm
- Destination Milton Keynes
- Destination Southampton Ltd.
- Dialog Semiconductor Ltd.
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- Hill Dickinson LLP
- Hinckley Island Hotel
- Holiday Inn Gatwick Airport
- Holiday Inn Glasgow Airport
- Holiday Inn Gloucester - Cheltenham
- Holiday Inn Haydock
- Holiday Inn M4, J4
- Holiday Inn Maidenhead / Windsor
- Holiday Inn, Chester South
- Holiday Inn, Eastleigh
- Holiday Inn, Leeds Brighouse
- Hotel du Vin Glasgow at One Devonshire Gardens
- Hull & East Yorkshire Conferences (part of Visit Hull and East Yorkshire)
- Impropriety
- In 2 Events
- Institute for Small Business and Entrepreneurship (ISBE)
- Institute of Highway Engineers
- Intelligent Events Limited
- IPMS UK
- Jesus Centre
- John the Composter (John Cossham)
- Kabuki Productions Limited
- KC Jones Conference & Events Ltd.

- Keele Conferences & Events
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- LBG
- Leadership Foundation for Higher Education
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- SOS
- South West Water
- Southport Conferences
- St. David's Hall
- Staffordshire County Council
- Sustainable Events Ltd.
- SwarmWorks Ltd.
- Talardy
- TFI Group
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- The Custard Factory
- The Hub, Edinburgh's Festival Centre
- The National Ice Centre and Capital FM Arena
- The Old School Sully
- The Tulip
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- Touch
- Tremough Campus, Cornwall
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- Turner Agency Limited
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- VisitBrighton
- VisitLanarkshireVenues
- Wales Millennium Centre
- Warwick Conferences Scarman House
- Web
- Welfare Society
- Welsh Integrated Sexual Health Meeting
- West Galloway U3A
- Whites and Co
- Will Hall
- Yummy Mummy

Appendix 6. Sources for Secondary Research

To establish populations, such as the total number of meetings and the total number of venues, the research team reviewed a wide range of academic and industry sources. Key secondary sources that were used to inform the report are identified here.

- *Belfast Venue Guide*
- *Britain for Events*
- *Business population estimates for the UK and Regions 2011 by Department for Business Innovation & Skills, 2011 BVEP report*
- Cvent
- *Eventia - UK Events Market Trends Survey 2012*
- Office for National Statistics
- Oxford Economics - *The Economic Impact of the UK Exhibitions Industry*
- People 1st
- Tourism Intelligence Unit
- Venuefinder.com
- *Visitor Economy Facts* by VisitBritain

In addition, the research team reviewed previous EIS studies in the US, Canada, Mexico, Denmark and Australia.



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In addition to university investment, research is funded via a range of international, national and local agencies or businesses. In recent years, these have been as diverse as Meeting Professionals International (MPI), the United Nations World Tourism Organisation (UNWTO), the European Commission, the Organisation for Economic Co-operation and Development (OECD), the Economic and Social Research Council (ESRC), the World Bank, government departments, the Institute of Travel and Tourism (ITT), the NGOs in various countries, sports governing bodies, event organisations and private companies.

Research is disseminated via industry reports, white papers, live event presentations and workshops as well as books and articles in various journals, including internationally leading, peer-reviewed publications. The centre also houses several book series and the *Journal of Policy Research in Tourism Leisure and Events, Mobilities and Progress in Responsible Tourism*. Visit www.leedsmet.ac.uk/icreth or follow @icreth on Twitter.



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