Meetings Activity Profile Report

Canadian Economic Impact Study 3.0 (CEIS 3.0), 2012 Base Year

MPI FOUNDATION CANADA

Maritz RESEARCH

The Conference Board of Canada

Greenfield Services Inc.

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Profile of Meetings Activity in Canada: 2012 Base Year

Highlights

- More than 585,000 business events were held in Canada during 2012 in almost 2,200 venues.
- The 44 million people who attended meetings included 37.8 million delegates, 3.3 million exhibitors, and 2 million professional speakers or other attendees.
- While meeting size ranged from as few as ten participants – the minimum attendance in MPIFC's definition of a meeting – to thousands in attendance, most were smaller, with less than 100 participants. The overall average event size was 74 persons.
- Most meetings lasted three days or less, with the most-frequently occurring category being one day or less, followed by two days, then three.
- The highest percentage of business events (32.9%) took place in Ontario, while substantial shares were also held in each of the other provincial regions of Quebec, 19.4%; Alberta, 14.8%; Atlantic Canada, 13.3%; British Columbia, 10.5%; and Saskatchewan-Manitoba, 9.1%.
- The highest percentage of meetings were hosted by the corporate sector (slightly more than 47% of all business events), with corporate and business meetings making up the largest single meeting category, at 44%, followed by conferences, conventions and congresses, at 30%.
- While the largest share of business events was hosted at hotels and resorts – in combination they captured more than 85% of the total activity – other non-conventional properties were popular for incentive events. More specifically, across all meeting types, a total of 28.3 million participants attended activities at hotels and resorts (with 26.6 million staying at hotels and 1.6 million staying at resorts), followed by 11.3 million at purpose-built venues and 4.4 million at special-event venues.
- Most (96%) of the 44 million people who attended meetings were from within Canada, including 20.7 million participants (58.7%) who were local to the event, having travelled less than 80 kilometers, and 13 million (37%) who lived within the hosting province. The 1.5 million (4%) who travelled internationally to meetings held in Canada made up the remaining 4%.
- The 585,000 business events attracted a broad range of participants and non-participants who accounted for $29.0 billion in overall spending.
- Attendees, specifically, spent just over $25 billion attending business events in Canada, with the largest shares of spending coming from meeting delegates, at $21.3 billion, and exhibitors, at $2.3 billion; while meeting speakers and other attendees, combined, spent $1.7 billion.

- International meeting attendees had highest overall average spending at $3,134 per meeting attendee, with Australian meeting delegates being the biggest spenders at an average overall spend of $6,867, followed by Chinese delegates, who spent $5,469 on average. Average delegate spending figures that were revealed for the other selected markets included $4,508 for Germany, $3,640 for the United Kingdom, $3,544 for Brazil, $2,614 for France, and $1,795 for the United States.
- Slightly more than two-thirds (67%) of meeting organizers in Canada indicated that the number of meeting events had remained constant from 2011 to 2012 but one-quarter believed the number of meetings would increase for 2013 compared to 2012, while 16% forecasted a decrease in meeting activity. Meeting venues, on the other hand, were more mixed in their opinions about recent meeting trends. Slightly less than half (49%) reported that the number of meeting events had increased from 2011 to 2012 and slightly more than one-third (36%) reported that that the number of meeting events stayed the same from 2011 to 2012.
- Only a quarter of venue managers forecasted that meetings would increase for 2013 compared to 2012, while 16% forecasted a decrease in 2013.

1.0 Introduction

The 2012 Canadian Economic Impact Study (CEIS 3.0) reports on meeting activity and the economic contributions of meetings, specifically business events, held in Canada for the study reference year 2012. The current study builds on the original CEIS 1.0 prototype study, conducted for the base year 2006, and other subsequent studies conducted in the United States, Mexico, and the United Kingdom, using the same research approach developed by the United Nations World Tourism Organization. This study extends the scope of previous analyses and includes the additional capacity of producing economic assessments of meetings at the regional, provincial and metropolitan levels. It also includes supplementary survey coverage of international delegates from seven key international markets, in order to compare the spending and economic contributions of international attendees with domestic business event attendees.

The 2012 CEIS 3.0 study was commissioned by the Meeting Professionals International Foundation Canada (MPIFC) and was undertaken by Maritz Research Canada, the Conference Board of Canada, Greenfield Services Inc., and the Canadian Tourism Human Resource Council. Input for the analysis was collected through in-depth survey responses from venue managers, meeting organizers, exhibitors, speakers, delegates, and destination marketing organizations (DMOs). In total, over 3,400 completed surveys were integrated into the analysis. Primary data were collected from meetings industry stakeholders from seven provincial/territorial regions of Canada – British Columbia, Alberta, Saskatchewan-Manitoba, Ontario, Quebec, Atlantic Canada (New Brunswick, Nova Scotia, Newfoundland, and Prince Edward Island), and the Northern Territories (North West Territories-Yukon-Nunavut), and for six Canadian municipal regions – Vancouver, Calgary-Edmonton, Toronto, Ottawa, Montreal and Quebec City. The tabulated survey results confirm that business events involve the participation of multiple stakeholders and require considerable financial commitments.

This report provides the findings of the first phase of the project, which is to establish an updated profile of meetings activity and the meetings industry in Canada in 2012. Disaggregated data are provided at national, and provincial-regional levels*.

**Note: Individual sub-samples of municipal level data obtained in the data collection phase were not of sufficient size or data quality to support municipal level break-outs at this non-economic phase of the analysis.*

1.1 Context of study

Until recently, a knowledge gap has existed about the meeting and business events industry and other industries that are impacted by meetings activity. The need for associations of meeting professionals and related constituencies and stakeholders to discuss the scale and economic contributions of meetings and business events on any given national, regional or local economy was a longstanding one. Like the tourism sector before it, the meetings sector had no way of illustrating the importance of its activity to specific economies in terms of jobs, taxes, or its contribution to Gross Domestic Product and aggregate Economic Output.

To address this knowledge gap, sponsorship funding was provided by Meeting Professionals International (MPI), the International Congress and Convention Association (ICCA) and Reed Travel Exhibitions for a United Nations World Tourism Organization (UNWTO) research undertaking in the mid-2000s on how best to reveal the economic contribution of the meetings sector. A main report was issued in 2006, and three subsequent documents on measuring meetings activity and identifying the industries involved were released in 2008.

In 2006, MPI Foundation Canada initiated the first-ever national study of the economic contribution of meetings activity, based on initial-discussion draft versions of the UNWTO report on how to best measure the meetings industry's economic importance. As such, the CEIS (1.0) final report, *The Economic Contribution of Meetings Activity in Canada*, released in 2008 for base year 2006, was the first study in the world to make use of the new UNWTO approach for measuring the economic contribution of meetings activity. In 2009, an update of the CEIS was undertaken through modeling the original data linked to officially reported tourism statistics that extended the timeframe for reported meeting activity in 2008.

In subsequent years, similar studies using the same broad methodological approach and similar measurement frameworks were completed by various national consortia (including MPI) in the United States, Mexico, Denmark, and most recently, England. Discussions associated with the development and release of each of these subsequent studies identified the need for an EIS that moves beyond national-level reporting and addresses the importance of meetings at regional and local levels. Other discussions envisaged extending the research and analytical scope to include supplementary comparisons and details about the spending and economic contribution of international meeting attendees as a distinct strategic market segment.

1.2 CEIS 3.0 objectives

Building on the foundation of the original CEIS, and informed by successful U.S. and Mexican EISs, the current study represents the implementation of the evolved guidelines for defining and measuring the aggregate levels and economic contributions of meetings activity through reporting on new base-year 2012 data, not only at the national level but at the regional and municipal levels as well. It also extends the scope of coverage and analysis to specifically break out and examine spending and economic contributions of international attendees from seven key strategic markets of interest for Canada – the United States, the United Kingdom, France, Germany, Australia, Brazil and China. Further, it lays the groundwork for post-study research and development of an online "meetings economic impact model" (to be developed as a separate project from CEIS 3.0).

1.3 Conceptual framework

The conceptual framework for this benchmark update study was based in part on the 2006 CEIS 1.0 study, which was guided by the 2006 UNWTO report with respect to the definition of meetings and the methodologies for quantifying the economic contributions and significance of meeting activities. Several documents were used to provide the conceptual frame of reference for the study, as follows:

- The Economic Contribution of Meetings Activity in Canada, MPIFC (June 2008)
- UNWTO Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension (November 2006)
- UNWTO Global Meetings Initiative Volume 1: Basic concepts and definitions (September 2008)
- UNWTO Global Meetings Initiative Volume 2: Identifying the link between tourism and the Meeting Industry: case studies (September 2008)
- UNWTO Global Meetings Initiative Volume 3: Pilot country data schedule (September 2008)

As in the 2006 prototype study, the 2012 CEIS 3.0 results were obtained through a combination of an ambitious primary data collection plan and economic analysis. First-of-its-kind survey research was specifically tailored to capture meetings activity data from both the "demand-side" constituencies (delegates, exhibitors, and speakers) and the industry "supply-side" (meeting organizers, venue managers, and destination marketing organizations), and economic modeling framed the results in a customized Meetings Accounting Framework. The accounting framework is based on, and is conceptually linked with, how tourism data are officially reported – the Tourism Satellite Account. The economic contribution analysis reveals the direct contribution of business events, along with the indirect and induced contributions, to the Canadian economy.

The overall measurement accounting framework and analysis approach used in this 2012 study are largely the same as those employed in the original 2006 CEIS 1.0 prototype study. Both studies are based on the implementation of the overall measurement accounting framework and approach outlined by the UNWTO preliminary report of 2006, *Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension* (November 2006). However, subsequent to the original CEIS 1.0 study, the UNWTO framework was refined in 2008 to limit the key measurement concept of meetings exclusively to business and professional events by explicitly excluding from the definition all personal, social, formal-educational, purely recreational, political, and consumer/customer-sales activities, as outlined in the *UNWTO Global Meeting Initiative, Volume 1: Basic Concepts and Definitions* (September 2008). Another change, introduced by UNWTO in 2008, was an expansion of the scope of meetings industry players to include DMOs.

1.4 Key definitions

For the purposes of this study, the term *meeting* and the more-precise term *business event* are used interchangeably, as defined in Table 1 below.

The UNWTO 2006 study and the later 2008 research guidelines and examples revealed that a fundamental problem in seeking to consistently assess the size and value of the meeting industry was a proliferation of different definitions of *meeting*, with 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. Meeting venues;
3. Meeting size; and
4. Meeting duration.

After extensive industry consultation and literature review, the UNWTO 2006 report recommended definitions and measurement criteria for each of the four meeting dimensions as well as three additional dimensions included later: meeting location, meeting types included and meeting types excluded, all of seven of which are included. Ironically, the

later 2008 UNWTO reports compounded the preceding problem of inconsistent definitions by introducing several refinements to the original core *meeting* definitions and criteria recommended in 2006.

As noted in Table 1, the measurements and data compiled in this second CEIS update study are based on the measurement refinements introduced by the UNWTO in 2008 and the term *meeting* refers to a gathering of 10 or more participants for a minimum of four hours at a contracted venue. Meetings include conventions, conferences, congresses, trade shows and exhibitions, incentive events, corporate business meetings, and other gatherings that meet the previously specified criteria. Meetings exclude social activities (wedding receptions, holiday parties, etc.), permanently established formal educational activities (primary, secondary, or university education), purely recreational activities (such as concerts, entertainment shows, and sports events), political campaign rallies, or gatherings of consumers or would-be customers by a company for the purpose of presenting specific goods or services for sale (consumer shows and consumer exhibitions), which would fall instead under the scope of retail or wholesale trade.

As a result, the major definitional differences in the measurement concepts between the 2006 and 2012 CEIS studies is the exclusion of consumer shows and consumer exhibitions from the demand-side meeting activities described in this report and the inclusion of DMOs within the meeting industry supply-side variable, also measured and described in this report.

Table 1: Definition of a Meeting / Business Event

Meetings Aims	To motivate participants, to conduct business, to share ideas, to learn to socialize 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	Canada
Key Meeting Types	■ Conventions / conferences / congresses ■ Trade shows / business exhibitions ■ Incentive events ■ Corporate / business meetings ■ Other meetings (which qualify under the defined criteria above)
Meeting Types Excluded	■ Consumer shows / consumer exhibitions* ■ Formal educational activities ("school classroom" meetings) ■ Social activities ■ Recreational / entertainment activities ■ Political campaign rallies

*Note: Consumer shows and consumer exhibitions were included within the scope of measurement and reporting in the previous 2006 CEIS 1.0 benchmark study and in subsequent update studies based on the implementation of the overall measurement accounting framework and approach outlined by the UNWTO preliminary report of 2006, *Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension* (November 2006). Subsequent UNWTO reports excluded consumer shows and consumer exhibitions from the UNWTO recommended meetings measurement framework.

Source: UNWTO, 2006 and 2008

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Marriott Hotels of Canada

Meetings & Incentive Travel

Meetings & Conventions Calgary

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Ottawa Tourism

Reed Travel Exhibitions and Business Events Canada

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Tourism Vancouver

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Canadian Association of Exposition Management

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Business Events Industry Council of Canada

Canadian Association of Professional Speakers

Canadian Society of Special Event Planners

Delta Hotels & Resorts

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Fairmont Hotels & Resorts

Fredericton Tourism

Hilton Hotels Canada

Ignite Magazine

Marriott Hotels of Canada

Meetings & Incentive Travel

Meetings & Conventions Calgary

Metro Toronto Convention Centre

MPI Atlantic Chapter

MPI Montréal-Québec Chapter

MPI Ottawa Chapter

MPI Toronto Chapter

MPI Manitoba Chapter

MPI Calgary Chapter

MPI Edmonton Chapter

MPI British Columbia Chapter

Professional Convention

Management Association, Canada East Chapter

Ottawa Tourism

Reed Travel Exhibitions and Business Events Canada

Regina Hotel Association

Society of Incentive Travel Executives (SITE) Canada

Starwood Hotels & Resorts Canada

Stronco Group

Tourism Moncton

Tourisme Montréal

Tourisme Québec

Tourism Saskatoon

Tourism Toronto

Tourism Winnipeg

Tourism Vancouver

Travel Alberta

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Canadian Tourism Commission

Canadian Tourism Human Resource Council

Conference Board of Canada

Destination Management Association of Canada (DMAC)

Greenfield Services Inc.

PKF Consulting Inc.

Statistics Canada, National Economic Accounts Division

3.0 Methods of Estimating the Volume and Value of Meetings

The data collection design, measurement and analysis approaches used in the 2012 study are largely the same as those employed in the original 2006 CEIS 1.0 prototype study. Both studies are based on the implementation of the overall measurement accounting framework and approach outlined by the UNWTO preliminary report of 2006, *Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension* (November 2006).

3.1 Primary data collection

The study was commissioned in 2013, and survey data were collected for reference year 2012 from mid-summer 2013 to the fall of 2013, with respondents using 2012 as the most recent full calendar year for reporting. In other words, the reference year chosen for the overall study and this Meeting Activity Profile Report is 2012.

Sampling Approach

Primary research consisted of six online sample surveys of six distinct business-meetings-related populations: three key demand-side meeting market segments – delegates, speakers and exhibitors; and three supply-side industry constituencies – meeting organizers, venue managers, and destination marketing organizations (DMOs) or Convention and Visitors Bureaus (CVBs). The targeted overall sampling goal of approximately 3,400 completed surveys represented a significant increase over the sampling goal of the 2006 CEIS study in order to support MPIFC's objective of extending the CEIS analysis to the regional and municipal levels.

To meet the goal of approximately 1,000 completed supply-side surveys of meeting industry constituents, venue managers and meeting organizers records were drawn from directories built by Greenfield Services Inc., a marketing research firm dedicated to the meetings and events industry in Canada.

To meet the goal of approximately 2,400 completed demand-side surveys, samples for domestic and international delegates were obtained from an established general population panel provider. Targeted international countries included the United States, the United Kingdom, France, Germany, Australia, Brazil and China, the combination of which accounted for 13.8 million international arrivals to Canada in 2012, or 85.7 % of worldwide international arrivals to Canada in 2012. In terms of their dollar value to the Canadian tourism economy, the same seven international markets accounted for $9.0 billion in international tourism expenditures in Canada, or 72.9% of overall worldwide international expenditures in Canada in 2012. [1]

Exhibitors, Speakers and DMOs/CVBs were recruited to complete their respective surveys via several means, including appeals by email through their respective industry associations (CAEM, CAPS, DMAC), posts in industry groups on LinkedIn, tweets with industry-related hashtags (e.g., #MPIToronto, #eventprofs) and direct, personal appeals by phone and email. Exhibitors were also contacted through various major exposition organizers. Where possible, associations were asked to actively commit to helping drive survey participation with their members. Custom survey links were created for many associations to send to their memberships.

Survey Instrument

As noted above, six separate survey instruments were developed for the six target sample populations: delegates, speakers, exhibitors, meeting organizers, venue managers, and DMOs/CVBs. The design of the six survey instruments was based largely on the previous 2006 CEIS 1.0 study and was informed by the revised 2008 UNWTO definitions and criteria guidelines along with the other EIS studies in the United States, Mexico, Denmark, and, most recently, the United Kingdom. Based on the practical experience gained from the previous CEIS studies and the USEIS study, questionnaires were streamlined as much as possible. One important change introduced through this streamlining was that all attendee survey instruments were redesigned to capture data on only one specific individual meeting that was attended or organized.

As was done previously, the meeting attendee survey instruments included a response, specifically for this Canadian study, to distinguish the broader domestic tourism travel related to meetings from non-tourism local travel related to meetings within the "local community" (defined as requiring less than 80 kilometers of direct travel by the attendee).

All surveys were available to Canadian respondents in English or French, while the delegate questionnaires were translated from English to French (French Canada and France), German, Brazilian, and Chinese.

Field Management

When field work commenced, target respondents were sent an email with an embedded password link to a secure site to complete the questionnaire. This allowed for monitoring the receipt of links, and whether or not they had been opened and started. It also provided for proactive personal follow-up.

After the initial survey invitation was deployed by email, recipients whose email "bounced" were contacted in order to secure an alternative contact. Similarly, after a few days, recipients were called who had opened their email but did not complete the survey. During this process, every effort was made to convey the importance of participating in the study.

[1] Source: Canadian Tourism Commission (2012), Canadian Tourism Commission Annual Report, p. 15.

Two weeks following deployment of the field surveys, a reminder was sent to those who had not completed the survey. A total of four reminder emails were deployed, at two-week intervals. Following this eight-week fielding period, calls were made to non-respondents, prioritizing "need areas" to achieve target completions in each region and by venue type. Further, and in conjunction with MPIFC, a list of 'must have' respondents was compiled (e.g., Tourism Toronto) and extra efforts were made to ensure they were captured in the final data set. In addition, while the predominant mode of collection was online, potential recruits preferring to complete the survey by phone or on paper were accommodated to suit their individual requests.

A specific supplementary communications plan was also developed to mitigate the low response rate problems experienced in the 2005 CEIS study. First and foremost was implementation of an outreach program to other industry associations. Each industry association was contacted first by email with a copy of the official appeal letter, followed by a series of personal calls to each group's senior leader. Text suitable for publication in member newsletters, blogs and other suitable channels was made available. Study updates were provided as milestones approached or when important developments occurred. Industry groups contacted included:

- CAEM, the Canadian Association of Exposition Managers
- CanSPEP, the Canadian Society of Professional Events Planners
- CAPS, the Canadian Association of Professional Speakers
- CCC, the Convention Centres of Canada
- CSAE, the Canadian Society of Association Executives
- CUCCOA, the Canadian University and College Conference Organizers Association
- GMIC, the Green Meetings Industry Association (Canada)
- HAC, the Hotel Association of Canada
- ISES, the International Special Events Society
- PCMA, the Canada East & Canada West Chapters of the Professional Convention Management Association.

Where possible, associations were asked to actively commit to helping drive survey participation with their members. As was done successfully in the USEIS, a document was drafted for willing associations to sign to solidify their commitment to helping MPI with this initiative and outlining their responsibilities.

In exactly the same fashion, all the major DMOs were contacted, which included those that had pledged support for the study in order to receive specific regional economic figures. The outreach also covered other DMOs for non-partner organizations, as well as for second and third-tier cities. Again, this was to ensure the highest possible level of cooperation and participation in the study. In all, it is estimated that approximately 50 organizations were contacted.

A concurrent social media campaign was also initiated to raise awareness of the importance of the study and the deadlines for participation, including:

- Generation of a project hashtag for regular Twitter posts (e.g., #MPIToronto, #eventprofs)
- Survey invitation postings and other study updates in relevant LinkedIn groups and on chapter Facebook pages

By engaging the support of these organizations, the importance of participation in this study was imparted, which, in-turn, enhanced survey participation.

Data Processing

Following collection, the data was weighted to accurately reflect the various population 'universes' from which the samples were drawn. The venue manager data required the most complex weighting structure. Based on consultation with MPI, the classification of the sample included the following types of variables: region, venue type, square footage of meeting space, and utilization rate. This process was designed to mitigate the impact of overly active/inactive space within the sample as well as to allow application to members of the universe not accounted for by interviews.

The remaining surveys were weighted, where possible, to their respective population universes by region and other factors as necessary. They were then integrated and reconciled with the weighted venue manager's survey to provide the detailed total estimates of meetings activity. In total, over 3,400 completed surveys were integrated into the final analysis.

Further, imputation was used at times to account for values where non-response to individual non-mandatory questions occurred. Mean values, and in some cases, multivariate calculations, were employed in these imputations.

3.2 Survey Responses

As shown in Table 2, a total of 3,376 questionnaires were received and integrated into the analysis. Most targeted sub-sample response goals were achieved for meeting delegates and other attendees.

Table 2: Sample Sizes

MARKET / STAKEHOLDER GROUP	COMPLETED SURVEYS
Meeting Delegate Attendees	2,370
Domestic	2,003
International	367
United States	100
United Kingdom	60
France	42
Germany	40
Australia	40
Brazil	44
China	41
Meeting Exhibitors/Speaker Attendees	67
Exhibitors	27
Speakers	40
Meeting Organizers/Planners	603
In House	464
British Columbia	39
Alberta	81
Saskatchewan	10
Manitoba	22
Ontario	243
Quebec	46
Atlantic Canada	23
Independent	139
British Columbia	10
Alberta	6
Saskatchewan	1
Manitoba	5
Ontario	92
Quebec	22
Atlantic Canada	3
Venue Managers	314
Destination Management Organizations	22
TOTAL	**3,376**

3.3 Secondary research

To establish such populations as the total number of meetings, total number of venues, and total expenditures of meeting participants, the research team reviewed a range of sources including:

- *Canadian Economic Impact Study (CEIS): Update 2007–2008*, MPI Foundation Canada, 2009
- *Canadian Tourism Commission Annual Report*, Canadian Tourism Commission, 2012
- *The Economic Contribution of Meetings Activity in Canada*, MPI Foundation Canada, 2008 (released in 2008 for base year 2006)
- *Canadian Tourism Satellite Account 2004*, Statistics Canada
- *Canadian Tourism Satellite Account 2008*, Statistics Canada

- *2010 Input Output Tables and Multipliers*, Statistics Canada
- *National Tourism Indicators*, 2006 through 2013
- *Government Revenue Attributable to Tourism*, Statistics Canada, 2012
- *Canadian Tourism Satellite Account Handbook*, Statistics Canada 2006
- *CTHRC Event Manager Occupational Standard*
- *PKF Working Tables: Hotel Meeting Space Supply Data*, 2007, 2012
- *CTC Working Tables: Business Travel by Purpose* from *CTC Markets* 13-07-23

In addition, the research team reviewed the previous CEIS 1.0 study research design and field results, as well as the other previous EIS studies commissioned in the U.S., Mexico, and England.

4.0 Key Findings of the Profile of Meetings Activity in Canada in 2012

The key findings are built on the data collected from the six surveys covering the demand and supply sides of meetings activity in Canada in 2012. After weighting and reconciliation of the six surveys, the projected figures provide a profile of an active and diverse meetings sector, one that touches many Canadians.

The estimate of the level of activity (who was involved and their associated expenditures) found later in this report will lead to a better understanding of the contribution of meetings activity to the Canadian economy in 2012.

4.1 Meetings Activity in Canada 2012

The survey data reports on the activities of meeting organizers, venue managers, delegates, exhibitors and speakers in 2012. These activities took place mainly at hotels and resorts, purpose-built convention facilities, special event venues, and to a lesser extent, at universities, colleges and attraction sites distributed throughout all of the studied provincial-territorial regions in Canada.

The meetings activity covered the large and the small; ranging from trade shows and exhibitions to conferences, conventions and congresses; and from incentive meetings to smaller corporate and association business events, such as shareholder meetings, training sessions and others. (Note: figures below are rounded.)

The study found that 2,176 unique venues hosted 585,000 meetings involving 37.8 million delegates, 3.3 million exhibitors, and 2 million professional speakers or other paid attendees. The size of these meetings ranged from as few as the qualifying minimum of ten participants to meetings with thousands in attendance. The following sub-sections of the report provide a more detailed breakdown of these figures and details of the expenditures associated with attending the meetings.

4.2 Meeting events

Table 3 shows the number and percentage of meetings by provincial region. The highest percentage of business events (32.9%) took place in Ontario, while substantial shares were also held in each the other provincial regions of Quebec, 19.4%; Alberta, 14.8%; Atlantic Canada, 13.3%; British Columbia, 10.5%; and Saskatchewan-Manitoba, 9.1%.

Table 3: Meeting Volume by Provincial Region

CANADA BY REGION	NUMBER OF MEETINGS	PERCENT
British Columbia	61,359	10.5
Alberta	86,507	14.8
Saskatchewan/Manitoba	53,756	9.1
Ontario	192,760	32.9
Quebec	113,363	19.4
Atlantic Canada*	77,694	13.3
TOTAL	**585,439**	**100.0**

**Atlantic Canada includes New Brunswick, Newfoundland, Nova Scotia, and Prince Edward Island.*

4.3 Meeting types

The majority (62.3%) of meetings – more than 364,000 events – were corporate and business meetings, as seen in Table 4, which shows the distribution of meetings by type of event. Following corporate and business meetings were conferences, conventions or congresses (19.8%), and other meetings (11.8%). The remaining 6% come under one of the remaining two in-scope meeting categories: incentive events (3.4%), or trade shows and business exhibitions (2.6%). [2]

Similarly, the relative frequency of different types of events found at the provincial regional level displays the same rank ordering of meeting types found at national level in the 2012 CEIS study. [3]

Table 4: Volume and Percentage of Meetings by Meeting Type

MEETING TYPE	NUMBER OF MEETINGS	PERCENT
Conferences/conventions/congresses (i.e., meetings of a professional, trade, or other non-corporate organization)	116,176	19.8
Trade shows/business exhibitions (i.e., exhibitions open to select audiences)	15,332	2.6
Incentive events (i.e., a meeting event as part of a program which is offered to its participants to reward a previous performance)	19,944	3.4
Corporate/business meetings (i.e., meetings of a corporation, representatives of an organization, or clients to conduct a business function that are held in a commercially-booked venue)	364,812	62.3
Other meetings (i.e., meetings not described above with a minimum of 10 attendees and duration of 4 hours or more)	69,175	11.8
TOTAL	**585,439**	**100.0**

Note: Excludes 9,686 consumer shows as "out of scope" by 2012 meetings definitions.

[2] Note that an additional 9,687 consumer trade shows were identified in the current study but were excluded from Table 4 because the terms of reference of the 2012 CEIS study specified that the study meetings population be realigned with the revised final UNWTO 2008 meetings definitions and scope specifications.

[3] As noted previously, consumer trade shows were excluded from Table 4 as they were deemed "out-of-scope" by the terms of reference of the current study.

4.4 Meeting venues

In total 2,176 meeting venues in Canada were identified in the study venue population. Table 5 shows the number and percentage of meeting venues by provincial region. The highest percentage of identified venues (36.1%) were located in Ontario, 18.2% were located in British Columbia, 17.0% in Quebec, 13.0% in Atlantic Canada, 10.6% in Alberta, and 5.0% in Saskatchewan-Manitoba.

Table 5: Number of Venues and Percentages by Regional Location

CANADA BY REGION	NUMBER OF VENUES	PERCENT
British Columbia	396	18.2
Alberta	230	10.6
Saskatchewan/Manitoba	109	5.0
Ontario	787	36.1
Quebec	371	17.0
Atlantic Canada*	283	13.0
TOTAL	**2,176**	**100.0**

**Atlantic Canada includes New Brunswick, Newfoundland, Nova Scotia, and Prince Edwards Island.*

For the municipal destinations included in the study, the largest percentage share of identified meeting venues is found in Toronto at 7.2%, followed by Montreal at 5.7%, and then Calgary at 4.2%, Ottawa at 3.4%, and Edmonton at 3.3%.

4.5 Venue types

Hotels with meeting facilities, the largest category of meeting venues (1,372 locations), made up the corresponding largest share of venues, at 63%. Resort properties with meeting space made up the second-largest share, at 17.8%; while 11.5% of identified meeting venues were other venues with meeting facilities but without lodging or rooms; 5.1% were purpose-built meeting facilities, such as conference centres without lodging or hotel rooms; and 2.5% were universities or colleges with meeting facilities.

4.6 Venue space

The universe of meeting venues in Canada were estimated to provide a total of 28.8 million square feet of meeting space in Canada in 2012, with an average offering of approximately 13,200 square feet per location. Similar to the identified locations of meeting venues, the highest percentage (34.5%) of identified venue meeting space, at 9.9 million square feet, was located in Ontario; Quebec was second with 16.6%, or 4.78 million square feet; then British Columbia, at 15.9% (4.5 million square feet); Atlantic Canada with 13.4%, at 3.8 million square feet; and finally, Saskatchewan-Manitoba with 9.5%, at 2.7 million square feet.

On average, 55% of the available meeting space was booked for meetings for a national average of 163 days, or for just under 45% of the year.

4.7 Venue hosts of meetings

Table 6 shows the volume and percentage of meetings by type of venue hosting the events. While the largest share of business events was hosted in hotels, resort properties and other non-conventional properties were quite popular for incentive events meetings. Hotels with meeting space hosted slightly more than 451,000 meeting events, representing the largest share (77.1%); and resort properties hosted the second-largest share of meetings (8.6%); while 5.6% were hosted by purpose-built meeting facilities without lodging or hotel rooms; 3.7% and 3.7% of meetings, respectively, were hosted by other venues with meeting faculties or other meeting facilities with lodging; and lastly, 1.2% of meetings were hosted by universities and colleges.

Table 6: Volume and percentage of meetings by venue type

VENUE TYPE	MEETINGS	PERCENT
Purpose-built meeting facility without lodging or hotel rooms (e.g., convention centre, exhibition hall, non-residential conference centre, multi-purpose centre)	32,814	5.6
Hotel with meeting facilities	451,205	77.1
Resort property with meeting facilities (excludes hotels)	51,259	8.8
Other meeting facility with lodging (e.g., residential training or conference centre)	21,386	3.7
University or college with meeting facility (This should include facilities such as lecture halls, conference rooms, classrooms, etc., but exclude an on-campus conference centre or hotel, which should be included in either the purpose-built facility or meeting facility with lodging previously noted.)	7,107	1.2
Other venue with meeting facilities (without lodging or hotel rooms), not specifically built for meetings, but which have facilities that are used for meetings (e.g., arena, stadium, park, racetrack, museum, theatre, restaurant)	21,669	3.7
TOTAL	**585,439**	**100.0**

Similarly, at the provincial-regional level, hotels with meeting facilities consistently ranked first as the preferred venue for hosting meetings in Canada in 2012.

4.8 Meeting host organizations

Table 7 shows the volume and percentage distribution of meetings hosted by various types of sponsoring-host organizations. Corporate organizations (i.e., for-profit businesses) hosted more than 275,000 business events in 2012, making up the largest share, at slightly more than 47% of all business events. Associations and membership organizations hosted more than 130,000 business events, making up the second-largest share of all meetings at 23%; followed by government organizations, at 15.9%; then non-government, not-for-profit organizations, at 10.3%; and lastly, other types of organizations, at 3.7%.

Table 7: Volume and Percentage of Total Meetings by Host Organizations

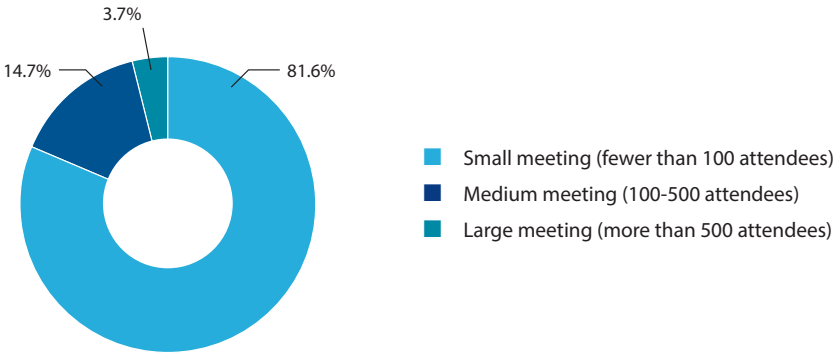
HOST ORGANIZATION	NUMBER OF MEETINGS	PERCENT
Association/membership organizations	134,651	23.0
Corporate organization (for-profit business)	275,742	47.1
Government	93,085	15.9
Non-government, not-for-profit organization	60,300	10.3
Other	21,661	3.7
TOTAL	**585,439**	**100.0**

Various non-specific services, hosted the more than 169,000 business events, making up the largest share, at 28.9% of all meetings. This was followed by the health care and social assistance sector, holding the next-largest share of meetings, at 13.3%; then education services (8.9%); finance and insurance (7.3%); accommodation and food services (3.6%); and lastly, agriculture and food, forestry, fishing and hunting, infrastructure and engineering at 3.4%.

4.9 Meeting size

The average size of a meeting in Canada in 2012 was 74 attendees. Meetings were divided into three categories, small, medium and large as shown in Figure 1. The majority of meetings, or slightly more than four-fifths (81.6%) were classed as small meetings with fewer than 100 attendees, 14.7% were classed as medium meetings with between 100 and 500 attendees, while the "Large meetings" class, with more than 500 attendees made up slightly less than 5% (3.7%) of the meetings.

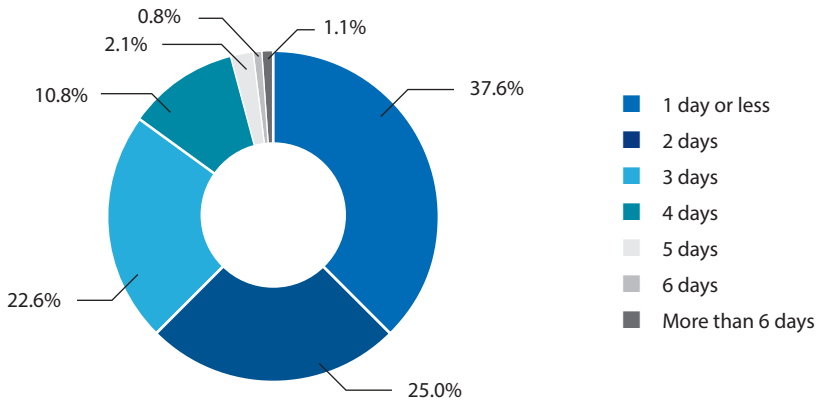
Chart 1: Size of Meetings (by number of attendees)



4.10 Length of meetings

The majority (85%) of meetings Canada in 2012 lasted three days or less; with the most frequently occurring category being one day or less (38%); followed by two days, at 25%; and three days, at 23%.

Chart 2: Length of Meetings (in days)



4.11 Meeting attendance

In 2012, an estimated 35.3 million participants attended meetings in Canada, as seen in Table 8, which shows the volume and percentage distribution of meeting participants by type of participant. The majority (86.9%) of meeting attendees were meeting delegates, at 30. 1 million participants, while invited exhibitors (2,048,000 participants), invited speakers (1.9 million participants) and others (700,000) accounted for relatively minor shares of overall attendance of 5.8%, 5.4% and 1.9%, respectively.

Table 8: Volume and Percentage of Total Attendance by Type of Participant

PARTICIPANT TYPE	NUMBER OF PARTICIPANTS (000's)	PERCENT
Delegates	30,657	86.9
Speakers	1,899	5.4
Exhibitors	2,048	5.8
Others	688	1.9
Total	**35,293**	**100.0**

Their total average length of stay was almost two nights (1.96 nights), 1.51 nights of which, on average, was spent for the purpose of attending the meeting; while, on average, and additional 0.46 nights were spent staying in the destination area before or after the meeting.

Table 9 shows the volume and percentage distribution of meeting attendance by meeting type and origin point of the attendees. The meeting category with the highest number of participants was corporate and business meetings, which, at 15,463,000 participants, accounted for 43.8% of the total number of attendees; followed by conferences, conventions and congresses, which attracted 29.6% of attendees; other meetings, at 17.5%; trade show and business exhibitions, at 6.1%; and incentive events, at 3.0%.

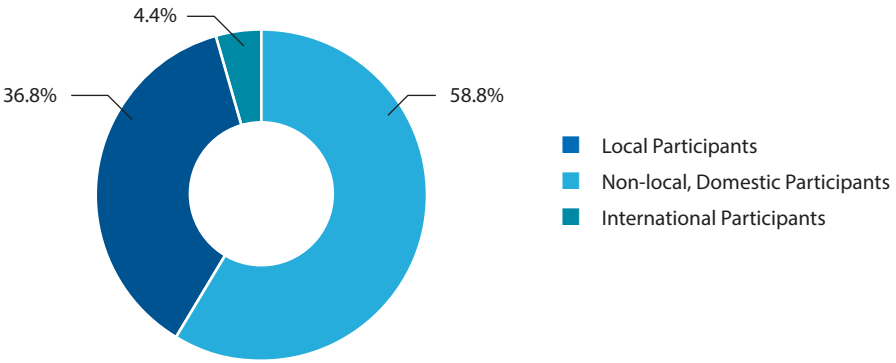
Table 9: Volume and Percentage of Total Attendance by Meeting Type and Origins of Meeting Participants

MEETING TYPE	LOCAL PARTICIPANTS (N, 000's;%)	NON-LOCAL, DOMESTIC PARTICIPANTS (N, 000's;%)	INTERNATIONAL PARTICIPANTS (N, 000's;%)	TOTAL (N, 000's;%)
Conferences/conventions/ congresses	5,150 49.3%	4,567 43.8%	720 6.9%	10,437 29.6%
Trade shows/business exhibitions	1,213 56.4%	622 28.9%	316 14.7%	2,151 6.1%
Incentive events	660 62.2%	308 29.0%	94 8.8%	1,062, 3.0%
Other business meetings	9,544 61.7%	5,573 36.0%	346 2.2%	15,463 43.8%
Other meetings	4,173 67.5%	1,915 31.0%	92 1.5%	6,180 17.5%
TOTAL	**20,739 58.8%**	**12,986 36.8%**	**1,568 4.4%**	**35,293 100.0%**

4.12 Meeting attendance by origin of participant

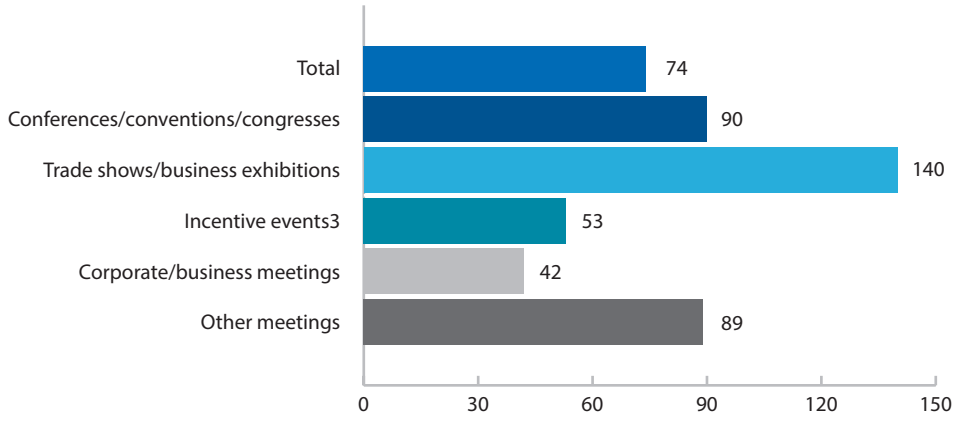
Table 9 also shows the origin numbers and corresponding percentages for the people who attended meetings in Canada in 2012. Domestic participants accounted for 95.6% of attendees, including 58.8% of the total attendees being from the immediate local area of the event, and 36.8 % comprising non-local domestic visitors; while international visitors comprised 4.4% of total meeting attendees. Notably, trade shows and business exhibitions attracted the highest percentage share of international participants (14.7%), followed by incentive events (8.8%) and conferences, conventions and congresses (6.9%).

Chart 3: Origin of Participant



As noted earlier, the average number of attendees per meeting was 74. However, the average number of attendees varied substantially, depending on the meeting category. Trade shows and business exhibitions have the highest levels of attendance, averaging of 140 attendees per event; while, corporate/ business meetings have the lowest average attendance, at 42 attendees per event.

Chart 4: Average Attendees by Meeting Type



4.13 Delegates

As noted previously, 30.6 million delegates attended meetings in Canada in 2012. As in the case of meeting participants in general, most were attending corporate/business meetings (45.4%) or conferences, conventions and congresses (28.2%). Substantially smaller shares and numbers attended other meetings (18.2%), trade show and business exhibitions (5.0%), and incentive events (3.2%).

As with meeting attendees in general, most delegates were drawn from the domestic business environment, with domestic delegates (95.8%) accounting for 63.4%, or approximately 29.4 million meeting delegates; and non-local domestic delegates accounting for 36.7%, at slightly more than 11.2 million meeting delegates. International delegates, on the other hand, accounted for only 4.3% of all meeting delegates, representing approximately 1.3 million meeting delegates.

4.14 Speakers

Approximately 1.9 meeting speakers attended meetings in Canada in 2012, most of whom were attending corporate/business meetings (48.3%) or conferences, conventions and congresses (33.9%).

As with meeting attendees and delegates, most speakers were drawn from the domestic business environment, with domestic local speakers accounting for 63.4%, or approximately 1.2 million meeting participants; and non-local domestic speakers accounting for 33.7%, at slightly more than 640,000 meeting participants. International speakers, on the other hand, accounted for only 2.9% of meeting speakers, representing approximately 55,600 meeting participants.

4.15 Exhibitors

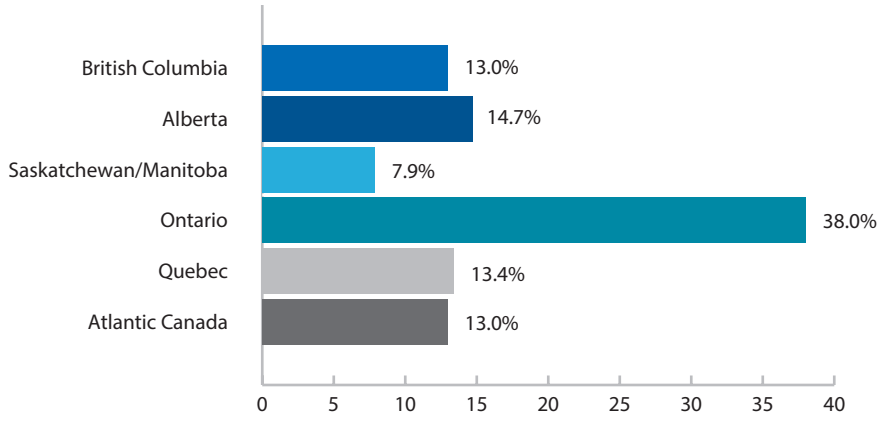
Approximately 2.0 million meeting exhibitors attended meetings in Canada in 2012, most of whom were attending conferences/conventions/congresses (46.5%) or trade shows/business exhibitions (26.0%).

Similarly, as with meeting speakers and meeting delegates in general, most of the 2.0 million exhibitors originated in the domestic business environment, with domestic local exhibitors accounting 48.9%, or 1.0 million meeting participants; and non-local domestic exhibitors accounting for 42.2%, or 865,000 meeting participants. International exhibitors, on the other hand, accounted for 8.8%, or approximately 181,000 participants in Canadian business events.

4.16 Meeting attendance by province

The highest percentage (38.0%) of attendees came to meetings in Ontario. The main other Canadian provincial regions in terms of attracting the largest number of attendees were Alberta (14.7%), Quebec (13.4%), British Columbia (13.0%), and Atlantic Canada (13.0%).

Chart 5: Meeting Attendance by Province



4.17 Meeting attendance by venue type

Table 10 shows the levels of attendance at business events in Canada by the type of meeting venue hosting the event. The largest share of business events attended by meeting participants occurred at hotels with meeting facilities. Convention centres and other purpose-built facilities were also popular with meeting participants. Sixty percent of all meeting participants attended meetings at hotels with meeting facilities, accounting of a total of over 23.3 million hosted-meeting participants (Table 10). A further 6 million people (17.1%) attended meetings at purpose-built meeting facilities without lodging or hotel rooms (e.g., convention centres, exhibition halls, non-resident conference centres). Much smaller proportions of meeting participants attended meetings at other venues with meeting facilities (10.4%), resort properties with meeting facilities (4.6%), and universities or colleges with meeting facilities (1.7%).

Similarly, at the provincial-regional level, the same pattern prevails, with more than 60% of meeting participants attending events mainly at hotels with meeting facilities across all provincial regions included in the current study.

Table 10: Volume and Percentage of Meeting Attendance by Venue Type

VENUE TYPE	NUMBER OF PARTICIPANTS (000's)	PERCENT
Purpose-built meeting facility without lodging or hotel rooms (e.g., convention centre, exhibition hall, non-residential conference centre, multi-purpose centre)	6,032	17.1
Hotel with meeting facilities	23,354	66.2
Resort property with meeting facilities (excludes hotels)	1,630	4.6
University or college with meeting facility (This should include facilities such as lecture halls, conference rooms, classrooms, etc., but exclude an on-campus conference centre or hotel, which should be included in either the purpose-built facility or meeting facility with lodging previously noted.)	607	1.7
Other venue with meeting facilities (without lodging or hotel rooms), not specifically built for meetings, but which have facilities that are used for meetings (e.g., arena, stadium, park, racetrack, museum, theatre, restaurant)	3,667	10.4
Total	**35,293**	**100.0**

5.0 Spending by Meeting Participants

As previously noted, the 35.3 million participants attending 585,000 business events held in Canada in 2012 generated $29.0 billion in meeting-related direct spending, involving a broad range of expenditure categories. While a large share of the costs associated with staging business events was supported through registration fees ($4.5 billion), a further $3.5 billion stemmed from contributions by host organizations or sponsorships and other financial support from various non-participants. Excluding registration fees, participants at business events spent $20.8 billion on getting to events and/or spending in and around host cities.

Table 11: Spending by Meeting Participants by Event Type

	PARTICIPANT EXPENDITURES	PERCENT
Conferences/conventions/congresses	$6.5 billion	31.2
Trade shows/business exhibitions	$3.1 billion	14.9
Incentive events	$785 million	3.8
Corporate/business meetings	$7.8 billion	37.5
Other meetings	$2.6 billion	12.5
Total	**$20.8 billion**	**100.0**

Table 11 shows the total spending (excluding registration fees) and percentage distribution of meeting participants by the types of events they attended. Corporate/business meetings captured the largest share (37.5%) of expenditures, involving $7.8 million, while Conferences/conventions/congresses were also popular (31.2%), accounting for an additional $6.5 million in meeting spending. Trade shows/business exhibitions, at $3.1 billion; other meetings, at $2.6 billion; and Incentive events, at $785 thousand, all captured smaller shares of participants' overall spending, at 15.9%, 12.5%, and 3.8%, respectively.

5.1 Spending by meeting attendees

Table 12 shows the average spending of all meeting attendees (delegates, speakers and exhibitors) broken out by expenditure categories and the attendee's point of origin – local attendees, domestic tourists and international visitors (day or overnight). The largest average spend was by international attendees ($3,134.56), next was domestic tourist attendees ($952.32), while the smallest average spend was by local, non-tourist attendees ($193.79).

Table 12: Meeting Attendee's Average Expenditures and % Share by Expenditure Category and Point of Origin Meeting

MEETING EXPENDITURE CATEGORIES	AVERAGE $ SPENT		
	LOCAL	DOMESTIC	INTERNATIONAL
Meeting registration fees	$ 70.54	$ 100.42	$ 227.70
Fees for optional program elements (receptions, golf events, etc.)	$ 7.66	$ 14.24	$ 135.29
Accommodations	$ 27.10	$ 275.99	$ 571.42
Food and beverage	$ 47.98	$ 139.47	$ 238.17
Air transportation	$ -	$ 219.31	$ 1,260.57
Rail transportation	$ 0.75	$ 4.77	$ 59.38
Water transportation	$ 0.10	$ 2.76	$ 12.38
Public ground transportation	$ 0.96	$ 3.93	$ 18.67
Taxi	$ 4.90	$ 17.01	$ 104.05
Car rental	$ 3.84	$ 36.67	$ 57.58
Gas	$ 12.26	$ 42.65	$ 27.24
Vehicle maintenance and repairs	$ 0.20	$ 0.98	$ 2.15
Tolls and parking	$ 4.02	$ 6.70	$ 8.07
Other transportation	$ 0.13	$ 1.52	$ 13.34
Retail spending	$ 6.10	$ 49.63	$ 164.95
Travel services	$ 0.75	$ 2.63	$ 35.96
Spectator sports	$ 0.89	$ 3.48	$ 16.02
Performing arts	$ 0.75	$ 4.51	$ 30.57
Museums, historical sites, zoos and parks	$ 0.31	$ 3.59	$ 29.81
Tours and sightseeing	$ 1.31	$ 4.95	$ 108.67
Other entertainment and recreation	$ 2.90	$ 15.96	$ 12.50
Other	$ 0.33	$ 1.15	$ 0.08
TOTAL	**$ 193.79**	**$ 952.32**	**$ 3,134.56**

Major expenditure categories varied by visitor origin but, overall, the seven major average expenditure categories were transportation to and from the event; accommodation; food and beverage; registration fees; retail purchases; fees for optional program elements, such as reception and golfing events; and local tours and sightseeing. The largest average spend was for the combination of air, rail and water transportation to and from the event ($1,332); followed by accommodations ($571); food and beverages ($238); registration fees ($227); retail purchases ($164); additional fees for optional program elements, such as reception and golfing events ($135); and local tours and sightseeing ($108).

5.2 Spending by meeting delegates

Meeting delegates, in particular, spent $21.3 billion attending business events in Canada in 2012. The breakdown of the seven major expenditure items for delegates while attending meetings was accommodations (23.7%); air transportation; rail and water transportation (23.7%); food and beverage (14.9%); registration fees (14.7%); retail purchases (4.8%); additional fees for optional program elements, such as reception and golfing events (2.6%); and local tours and sightseeing (1.2%). One additional main spending item specific to delegates was other entertainment and recreation at 1.3% of their meeting-spending budget.

Table 13 shows total average delegate spending data compiled for the six key business tourism markets surveyed in particular – the United States, the United Kingdom, France, Germany, Australia, Brazil and China – revealing that meeting delegates from the Australian market were the highest meeting spenders, with an average overall spend of $6,867, followed by Chinese visitors, who spent $5,469, on average, as delegates to meetings in Canada. Average delegate-spending figures revealed for the other selected markets included $4,508 for Germany, $3,640 for the United Kingdom, $3,544 for Brazil, $2,614 for France, and $1,795 for the United States.

Table 13: Average Spending by Meeting Expenditure Category for Delegates from Selected International Markets

MEETING EXPENDITURE CATEGORIES	TOTAL AVERAGE $ SPENT						
	US	UK	France	Germany	China	Australia	Brazil
TOTAL	**$1,795**	**$3,640**	**$2,614**	**$4,509**	**$5,469**	**$6,866**	**$3,544**

5.3 Spending by meeting exhibitors, speakers and others

Meetings exhibitors spent $2.3 billion attending business events in Canada in 2012, while meeting speakers and other attendees, combined, spent $1.7 billion. As with meeting delegates, the highest spend by exhibitors, speakers and other attendees was for the eight main spending categories found for other delegate attendees, namely: transportation to and from the event location; accommodations; food and beverages; registration fees; retail purchases; fees for optional program elements, such as reception and golfing events; local tours; and sightseeing and other entertainment and recreation.

5.4 Meeting organizers

Meeting organizers spent a total of $3.9 billion in planning and implementing business events in Canada in 2012. The breakdown of major specific expenditure items for meeting organizations was food and beverage (37.0%), meeting and venue rental (13.5%), audio-visual/staging services (11%), and equipment rental (4.0%).

The meeting events that generated the highest expenditures by meeting organizers in Canada were corporate and business meetings, with $ 1.8 billion in costs; followed by conference, convention and congress meetings, with $908 million in costs. Organizers hosting incentive events generated $29 million in meeting expenditures, while hosting trade shows generated $228 million in meeting expenditures, and hosting all other types of meetings generated $568 million in meeting expenditures.

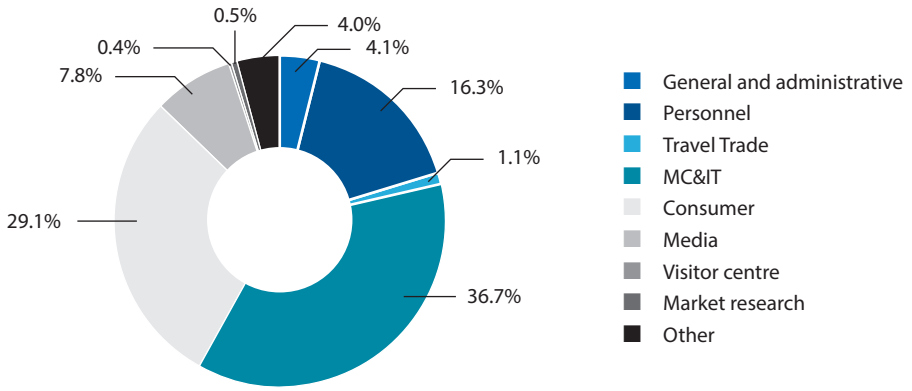
5.5 Destination Management Organizations (DMOs)

DMOs were asked about their financial commitment to business events in terms of their annual operating budgets. Table 14 shows the attributed financial commitment of DMOs to business events by expenditure category. The largest contribution to business events (36.7%) stemmed from MC&IT related operating expenditures ($19.4 million).

Table 14: DMO Meeting Expenditures ($) and % Share by Expenditure Category

MEETING EXPENDITURE CATEGORIES	$ SPENDING	PERCENT OF TOTAL MEETING SPENDING
General and administrative	$ 2,179,609	4.1
Personnel	$ 8,641,640	16.3
Travel Trade	$ 571,645	1.1
MC&IT	$ 19,470,410	36.7
Consumer	$ 15,431,514	29.1
Media	$ 4,113,660	7.8
Visitor centre	$ 215,213	0.4
Market research	$ 267,393	0.5
Other	$ 2,102,323	4.0
Total	**$ 52,993,407**	**100.0**

Chart 6: Expenditure Categories



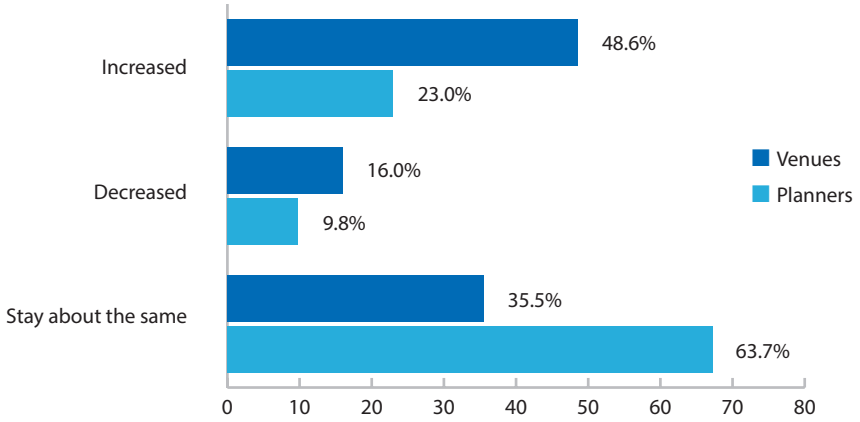
6.0 Perceived Trends and Outlook

6.1 Number of meetings organized by meeting planners

As a part of the study, meeting organizations (meeting organizers and venues) were asked for their perceptions of the most recent year-over-year trend (2011–2012) and the likely outlook for the forthcoming year (2013) for meeting activity.

Slightly more than two-thirds (67%) of meeting organizers indicated that the number of meeting events had stayed the same from 2011 to 2012, while one-quarter (23%) said the number had increased. Meeting venue managers, showed more optimism in their opinions about recent meeting trends, with one-third (35%) stating no change but close to one-half (48%) stating an increase in the number of meetings. Smaller proportions of each group suggested a decrease.

Chart 7: Perspective on Industry Growth/Decline (2012 vs. 2011)



7.0 Conclusions

The study found that in 2012, Canada hosted 585,000 meetings in 2,200 unique venues which attracted 37.8 million delegates, 3.3 million exhibitors, and 2 million professional speakers or other paid participants. While the size of these meetings ranged from as few as the qualifying minimum of ten participants to meetings with thousands in attendance, most were smaller meetings with less than 100 participants, and the overall average event size was 74 persons.

The highest percentage of meetings were hosted by the corporate sector (slightly more than 47% of all business events), with corporate and business meetings making up the largest single meeting category, at 44%, followed by conferences, conventions and congresses at 30%. Most meetings also lasted three days or less; with the most frequently occurring category being one day or less, followed by two days, then three.

The highest percentage of business events (32.9%) took place in Ontario, while substantial shares were also held in each of the other provincial regions of Quebec, 19.3%; Alberta, 14.7%; Saskatchewan-Manitoba, 13.2%; British Columbia, 10.7%; and Atlantic Canada, 9.1%.

While the largest share of business events were hosted at hotels and resorts – in combination they captured more than 85% of the total activity – other non-conventional properties were quite popular for incentive events. More specifically, across all meeting types, a total of 28.3 million participants attended activities at hotels and resorts (with 26.6 million staying in hotels and 1.6 million staying in resorts), followed by 11.3 million in purpose-built venues, and 4.4 million in special-event venues.

These events attracted a broad range of participants and non-participants accounting for $29.0 billion in overall spending. Excluding registration fees, participants at business events spent $20.8 billion on getting to events and/or spending in and around host cities. Meeting attendees, in particular, spent just over $25 billion attending business events in Canada; with largest share of spending coming from meeting delegates at $21.3 billion Exhibitors spent $2.3 billion while meeting speakers and other attendees combined spent $1.7 billion.

Primary survey research revealed that 96% of people attending meetings were from within Canada, including 20.7 million participants (58.7%) who were local and who had travelled less than 80 kilometers to reach their meetings; 13 million (37%) were based within their host province, and 1.5 million (4%) travelled internationally.

International meeting attendees had highest overall average spending at $3,134 per meeting attendee, with Australian meeting delegates being the biggest spenders, at an average overall spend of $6,867, followed by Chinese attendees, who spent $5,469 on average as delegates. Average delegate spending figures that were revealed for other selected markets included $4,508 for Germany, $3,640 for the United Kingdom, $3,544 for Brazil, $2,614 for France, and $1,795 for the United States.

Slightly more than two-thirds (67%) of meeting organizers indicated that the number of meeting events had stayed the same from 2011 to 2012, with an additional 23% reflecting an increase. Meeting venues, on the other hand, were more mixed in their opinions about recent meeting trends, with slightly more than one-third (36%) reporting that that the number of meeting events stayed the same from 2011 to 2012, and one-than half (49%) reporting that the number of meeting events had increased.

Without a doubt, the industry is a formidable one and has made considerable progress over the past few years in defining itself and gaining recognition of its economic importance. These findings and future findings to be shared represent proof the industry is noteworthy, contributing heavily not only to the economy but also shaping how people come together, interact, innovate, and bond.