Meetings Activity in 2006: A Portrait of the Canadian Sector

Maritz RESEARCH

The Conference Board of Canada
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MPI FOUNDATION CANADA

This report is a summary of the Canadian Economic Impact Study. For further information on the full report, please visit www.mpiweb.org

Canada's meetings sector organized 671,000 meetings in 2006, welcomed 70.2 million participants, created the equivalent of 235,500 full-year jobs, and accounted for $32.2 billion in direct spending ($23.3 billion by meeting participants and $8.9 billion by non-participant sponsors and stakeholders), according to a landmark study commissioned by Meeting Professionals International Foundation Canada (MPIFC).

The study, conducted by Maritz Research Canada and the Conference Board of Canada, fulfilled one of the cornerstones promised behind the capital funding campaign that brought MPIFC into existence. It was the first to measure the economic activity surrounding meetings in Canada, based on in-depth survey responses from meeting organizers, venue managers, exhibitors, speakers and delegates.

The study was also the first to address the new economic measurement methodology developed by the World Tourism Organization (UNWTO), aimed at calculating business activity in a sector that overlaps many different parts of the wider economy. UNWTO released their report in November, 2006 with participation from MPI, Reed Travel Exhibitions, and the International Congress and Convention Association (ICCA). It is hoped that, over time, adoption of this methodological approach by governments and international agencies will help establish a distinct meetings sector that contributes jobs, tax revenues, and educational impact to economies around the world.

MEETINGS ACTIVITY IN CANADA IN 2006	
Total meetings	671,000
Total participants	70.2 million
Full-year jobs (equivalent)	235,500
Direct spending	$32.2 billion

Why Does Economic Impact Matter?

Meeting professionals know that clients rarely value what they can't measure. That's why economic impact has become one of the gold standards for establishing that any profession or industry is sufficiently mature and established to be taken seriously

by clients and employers

by the economists and statisticians whose research informs public policy

by decision-makers at all levels of government.

But measuring the economic impact of meetings activity is more difficult than it is for other industries and sectors. That's because the goods, services, and expertise that go into a successful meeting span many different parts of the economy, and may not always be included in a calculation of the meetings sector's economic impact.

- A hotel might be fully booked for a city-wide convention, and then offer 80% of its rooms to leisure travellers the following week.
- A special events venue might book 100 weddings per year, but become a part of the meetings sector for the 15 or 20 conference banquets that it hosts over the same period.
- A florist, a butcher, a photography studio, or a small supplier in some other specialty area might rely on meetings for a steady share of its annual revenue. These organizations are not considered a part of the meetings sector, but their fees and expenses must still be calculated as part of the total annual spend on meetings.
- Expenditures by participants attending a meeting in their home community would definitely fall within the meetings economy, but would never be counted as tourism spending.

Building an Economic Model

Meeting professionals have first-hand experience with the economic impact of the meetings they organize and supply. Many of them can tell a compelling story about the dollars they spend and the jobs their meetings create in host communities, in Canada and around the world.

Until now, though, much of what we've known about meetings spending has been based on front-line experience. Rich and varied as it is, that experience has been treated as a collection of anecdotes by the senior stakeholders whose decisions can either open doors or close off opportunities for meeting professionals. Canada has had no economic data on the size and scope of meetings activity, and only now does the global meetings sector have access to a recommended measurement methodological framework, developed by UNWTO.

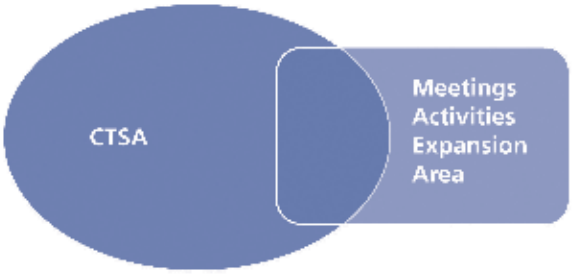
For anyone involved in measuring the impact of the tourism sector, the challenges facing the meetings sector are not new. Tourism is now recognized as one of the world's leading economic drivers, but that wasn't always the case. Years ago, tourism researchers knew that the sector had a huge impact on the economy – locally, nationally, and globally. Identifying that impact was not easy – the difficulties of defining and measuring all visitors and collecting data on both their expenditures, and the revenues received by the myriad businesses that serve them, required the development and implementation of a new customized accounting framework.

In 2001, after more than a decade of research and negotiation, the tourism sector developed and finalized the design of a Tourism Satellite Account (TSA) that precisely defined the tourism-related

Building an Economic Model

activity that goes on within the economy as a whole. With the meetings economy facing the same types of measurement challenges, meetings organizations realized that their best hopes for defining their sector's economic contribution lies in a similar approach. With the completion of the MPI Foundation Canada study, the meetings sector is a step closer to the goal of obtaining a meetings extension to the TSA, one that brings together all the various elements of meetings spending – within tourism, and beyond.

Figure 1 - Relationship Between CTSA and Meeting Expansions



A Global Dialogue

Canada's economic impact study coincided with the UNWTO's decision to develop a recommended methodology for measuring the economic value of meetings activity in national economies. The UNWTO recommendations were published in late 2006, just in time to shape the methodology for this study. In 2007 a series of Global Meetings Initiative (GMI) national pilot projects were launched, through the UNWTO, to gain practical experience with the measurement process.

The timing could not have been better, for the Canadian meetings sector or for MPI as a whole. MPI Foundation Canada was the first to complete a study, which while distinct from the GMI initiatives, sought to address the recommended UNWTO methodology. And the timing of the pilot projects creates an opportunity to share ideas and discuss lessons learned with researchers in several other countries. Meanwhile, the combined weight of these studies will draw international attention to the importance of measuring and understanding the economic impact of meetings activity. This momentum will bring us closer to the day when meetings are recognized around the world as an important economic driver.

Meetings Activity in 2006

671,000 meetings

In 2006, 1,517 venues hosted 671,000 meetings across Canada.

476,900 meetings, more than 75% of the total activity, took place in hotels and resorts. Meetings activity included 147,400 gatherings in special event venues, 24,000 in purpose-built venues, and 22,400 in other types of facilities.

391,000 meetings, nearly 60% of all gatherings in Canada, fell under the heading of "other business meetings." In addition to 126,000 conferences, conventions, and congresses, Canadian meeting professionals planned and supplied 12,000 incentive meetings, 11,000 trade shows and business exhibitions, and 7,000 consumer shows.

MEETINGS			BY VENUE			
	Total Number of Meetings	Share of Total	Purpose-Built	Hotels/ Resorts	Special Event	Other
Conferences/ Conventions/ Congresses	126,000	18.8%	3,800	105,400	14,800	2,200
Consumer shows/ Consumer Exhibitions	7,000	1.0%	900	4,400	1000	300
Trade shows/ Business Exhibitions	11,000	1.6%	1000	8,100	1,400	500
Incentive Meetings	12,000	1.8%	400	9,100	1,100	1,100
Other Business Meetings	391,000	58.3%	12,800	300,700	62,700	15,300
Other Meetings	124,000	18.5%	5,100	49,200	66,600	3,000
TOTAL	**671,000**	**100.0%**	**24,000**	**476,900**	**147,400**	**22,400**

[Note: All figures presented in this report are rounded; totals may vary from the sum of line items.]

Meetings Activity in 2006

70.2 million participants

The 70.2 million people who attended meetings in Canada in 2006 included 66.5 million delegates, 452,000 exhibitors, and 3.3 million professional speakers or other paid attendees.

The size of individual meetings ranged from 10—the minimum attendance in MPIFC's definition of a meeting—to tens of thousands. While the largest proportion of gatherings fell into the category of "other business meetings," total attendance was higher for conferences, conventions, and congresses, and for consumer shows.

The characteristics of different meeting types also tended to determine the venues chosen to host them. While hotels and resorts drew the largest number of participants for conferences, conventions, congresses, incentive, and "other" business meetings, purpose-built venues drew the lion's share of the traffic for trade and consumer shows.

	Conferences/ Conventions/ Congresses	Consumer Shows/ Consumer Exhibitions	Trade Shows/ Business Exhibitions	Incentive Meetings	Other Business Meetings	Other Meetings	Total
Total Participants	23,103,900	15,653,600	3,719,500	4,109,000	15,546,800	8,122,700	70,255,500
Share of Total	33%	22%	5%	6%	22%	12%	100%
By Venue							
Purpose Built	6,765,000	14,570,000	2,522,300	289,900	3,343,500	3,926,700	31,417,500
Hotels/Resorts	15,360,200	953,300	953,900	3,011,800	9,658,900	2,579,700	32,517,800
Special Event	694,300	100,400	170,100	400,500	2,021,500	1,546,900	4,933,800
Other	284,300	29,900	62,300	406,800	522,900	69,400	1,375,600
By Origin							
Local	12,616,000	9,461,100	1,938,300	1,078,200	8,661,000	6,606,300	40,360,900
Other intra-Province	6,424,600	2,667,100	593,200	1,681,900	4,913,400	293,800	16,574,000
Other Canada	3,387,700	2,994,500	755,300	1,043,100	1,772,100	929,400	10,882,100
International	675,600	530,900	432,700	305,800	200,300	293,200	2,438,500

Meetings Activity in 2006

All meeting types

- Across all meeting types, a total of 32.5 million participants attended activities in hotels and resorts, followed by 31.4 million in purpose-built venues and 4.9 million in special event venues.
- 40.4 million participants (57.5%) travelled less than 40 kilometres to reach their meetings. 16.6 million (23.6%) were based in the host province, 10.9 million (15.5%) travelled within Canada, and 2.4 million (3.4%) travelled internationally.

Conferences, conventions, and congresses

- The 23.1 million participants who attended conferences, conventions, and congresses included 15.4 million in hotels or resorts, followed by 6.8 million in purpose-built venues.
- 12.6 million conference, convention, and congress participants (54.6%) travelled less than 40 kilometres to reach their meetings. 6.4 million (27.8%) were based in the host province, 3.4 million (14.7%) travelled within Canada, and the remaining 675,600 (2.9%) travelled internationally.

Consumer shows and exhibitions

- The 15.7 million participants in consumer shows and exhibitions included 14.6 million in purpose-built venues, 953,300 in hotels and resorts, and 100,400 in special event venues.
- 9.5 million consumer show participants (60.5%) travelled less than 40 kilometres to reach their meetings. 2.7 million (17.0%) were based in the host province, nearly 3.0 million (19.1%) travelled within Canada, and 530,900 (3.4%) travelled internationally.

Trade shows and business exhibitions

- The 3.7 million participants in trade shows and business exhibitions included 2.5 million in purpose-built venues, 953,900 in hotels and resorts, and 170,100 in special event venues.
- 1.9 million trade show participants (52.1%) travelled less than 40 kilometres to reach their meetings. 593,200 (16.0%) were based in the host province, 755,300 (20.3%) travelled within Canada, and 432,700 (11.6%) travelled internationally.

Meetings Activity in 2006

Incentive meetings

- The 4.1 million participants at incentive meetings included 3.0 million in hotels and resorts, 400,500 in special event venues, and 289,900 in purpose-built venues.
- 1.1 million incentive participants (26.2%) travelled less than 40 kilometres to reach their events. 1.7 million (41.0%) were based in the host province, 1.0 million (25.4%) travelled within Canada, and 305,800 (7.4%) travelled internationally.

Other business meetings

- In the broad category of other business meetings, the nearly 15.6 million participants included 9.7 million in hotels and resorts, more than 3.3 million in purpose-built venues, and 2.0 million in special event venues.
- Nearly 8.7 million participants in other business meetings (55.1%) travelled less than 40 kilometres to reach their meetings. 4.9 million (31.4%) were based in the host province, nearly 1.8 million (11.5%) travelled within Canada, and 200,300 (1.3%) travelled internationally.

Other meetings

- For miscellaneous meetings that fell into no specific category, more than 8.1 million participants included 3.9 million in purpose-built venues, 2.6 million in hotels and resorts, and nearly 1.6 million in special event venues.
- More than four-fifths of participants in "other" meetings—6.6 million, or 81.3%—travelled less than 40 kilometres to reach their meetings. 293,800 (3.6%) were based in the host province, nearly 929,400 (11.4%) travelled within Canada, and 293,200 (3.6%) travelled internationally.

Meetings Activity in 2006

$32.2 billion in spending

Meetings in Canada generated $32.2 billion in spending in 2006 ($23.3 billion by meeting participants and $8.9 billion by non-participant sponsors and stakeholders), including $7.5 billion generated by local meetings activity. Average spending was higher for delegates who travelled farther to attend a meeting, and for delegates attending trade shows. International trade show delegates, followed very closely by international visitors attending conferences, conventions, or congresses, accounted for the highest per-person expenditures.

Average Spending per Delegate

	DELEGATE PLACE OF ORIGIN				
MEETING TYPE	LOCAL	INSIDE PROVINCE	OUTSIDE PROVINCE	OUTSIDE COUNTRY	OVERALL AVERAGE
Conference	$128	$326	$763	$1,781	$341
Consumer	$266	$372	$383	$1,426	$346
Trade	$520	$260	$1,059	$1,799	$742
Incentive	$589	$246	$772	$1,398	$555
Other Business	$100	$241	$471	$1,651	$212
Other Meeting	$119	$196	$310	$382	$154

Meetings Activity in 2006

Direct spending by all participants accounted for $23.3 billion (72%) of total meetings spending. Of that amount, $21.7 billion came from delegates, $1.2 billion from exhibitors, and $391 million from professional speakers. Within the three participant groupings, delegates and speakers generated their highest expenditures attending conferences, conventions, and congresses, while exhibitors spent more than 58% of their money attending consumer shows.

Total Expenditures by Participant Type and Meeting Type

	PARTICIPANTS			
MEETING TYPE	DELEGATES	EXHIBITORS	SPEAKERS	TOTAL
Conference	$7,121,390,000	$203,096,000	$253,385,000	$7,577,871,000
Consumer	$5,320,338,000	$702,751,000	$7,368,000	$6,030,457,000
Trade	$2,635,328,000	$230,355,000	$10,784,000	$2,876,467,000
Incentive	$2,269,106,000	-	$4,554,000	$2,273,660,000
Other Business	$3,103,425,000	$63,219,000	$99,487,000	$3,266,131,000
Other Meeting	$1,224,302,000	$406,000	$15,463,000	$1,240,171,000
All Meeting Types	$21,673,889,000	$1,199,827,000	$391,041,000	$23,264,757,000

Meetings Activity in 2006

But this spending by participants still represents less than three-quarters of the $32.2 billion spent on meetings activity. The sophisticated new methodology behind this study indentified "total demand" for meetings in Canada and factored in purchases or rentals of supplies, facilities, and professional services by non-participants, all of which are integral parts of a successful meeting.

Key components of the $32.2 billion total included:

- $12.3 billion spent by participants on tourism commodities such as food and beverage services, accommodation, and transportation
- $5.6 billion on registration fees; $2.3 billion (41.1%) of which were paid by local participants, $2.6 billion (46.1%) domestic , and $714 million (12.8%) by international participants
- $6.7 billion from non-participants, in sponsorship and other fees and contributions from meeting stakeholders
- And a total of $7.6 billion, from both participants and non-participants, spent on commodities produced by industries other than either meetings or tourism industries

CATEGORY OF EXPENDITURE	EXPENDITURE COMMODITY	ALL PARTICIPANTS	NON-PARTICIPANTS (SPONSORS & OTHER STAKEHOLDERS)	TOTAL DEMAND
MEETING COMMODITIES				
	Registration fees	$5,586,000,000		$ 5,586,000,000
	Other meeting fees and contributions		$ 6,706,000,000	$ 6,706,000,000
TOURISM COMMODITIES				
Transportation		$3,644,000,000		$ 3,644,000,000
Accommodation		$3,194,000,000		$ 3,194,000,000
Food & Beverage Services		$3,773,000,000		$ 3,773,000,000
Other tourism commodities		$1,658,000,000		$ 1,658,000,000
OTHER COMMODITIES	(Tourism or Meetings related "other" commodities)	$5,410,000,000	$ 2,212,000,000	$7,622,000,000
TOTAL MEETING EXPENDITURES		$23,265,000,000	$ 8,918,000,000	$ 32,183,000,000

Meetings Activity in 2006

The detailed analysis of meetings spending paints a picture of a comprehensive, wide-ranging enterprise; it attaches accurate dollar figures to the range of organizers' requirements and the variety of participant experiences. It also helps explain the complexity of the research required to tie down the value of meetings spending.

When looking at the "Total Demand" for meetings, the specified tourism commodities totalled $12.3 billion, of which food and beverage services accounted for nearly $3.8 billion (30.8%), followed closely by transportation at more than $3.6 billion (29.7%) and accommodation at $3.2 billion (26.0%). These three lead categories combined accounted for 86.5% of the tourism commodities purchased for meetings activity.

Within transportation, the two largest categories were air travel, at nearly $1.5 billion (40.1%), and vehicle fuel, at more than $1.2 billion (33.3%). This means that more than three-quarters of the transportation services purchased in support of meetings activity in Canada are vulnerable to rapid increases in fuel costs, and are also tied in with the urgent need for a rapid reduction in carbon and environmental footprints, within the meetings economy and across all economic sectors.

Focus on Meeting Organization Spending

Expenditures on meeting organization demonstrated the extent to which meetings spending ripples through the general economy. In 2006, highlights included

- Nearly $2 billion on management fees for meeting organizers
- $959.3 million on equipment, production, and technical costs
- $644.3 million on audio-visuals and staging
- $629.4 million on administration
- $430.1 million on décor
- $391 million on keynote speakers and other sponsored attendees
- $357.7 million on printing
- $341.9 million on advertising and promotion
- $178.7 million on entertainment
- $173.4 million on meeting management and destination management companies
- $166.3 million on gifts and awards
- $120.5 million on Internet and Web-based services and promotions
- $84.8 million on delegate bags, materials, and giveaways
- $24 million on shipping
- Nearly $13 million on insurance

Meetings Activity in 2006

Meeting Organization Spending

	EXPENDITURE
GOODS AND SERVICES	
Venue hire	$ 753,063,000
Food and Beverage	$ 2,935,629,000
Equipment / production / technical costs	$ 959,301,000
Administration	$ 629,436,000
Advertising and promotion of meeting	$ 341,889,000
All Internet and online/web-based services or promotions	$ 120,498,000
Keynote speaker and other sponsored participants	$ 391,043,000
Insurance	$ 12,949,000
Other facility costs	$ 112,953,000
Meeting Management Company/ Destination Management Company (DMC)	$ 173,417,000
Printing	$ 357,697,000
Temporary staff agency	$ 87,437,000
Company staff (food & beverage, travel, accommodation)	$ 246,123,000
Audio visual and staging	$ 644,259,000
Décor	$ 430,145,000
Entertainment	$ 178,676,000
Gifts and awards	$ 166,256,000
Shipping	$ 23,961,000
Sponsor expenses	$ 48,415,000
Delegate materials (delegate bags, give-aways, etc.)	$ 84,811,000
Transportation (organization purposes only - non-delegate)	$ 274,619,000
Accommodation (organization purposes only - non-delegate)	$ 368,546,000
Meeting Organization fee income/management fees from clients	$ 1,942,845,000
Other	$ 820,098,000
TOTAL SPENDING	**$12,104,066,000**

Meetings Activity in 2006

Focus on Participant Spending

Meanwhile, the list of expenditures outside the familiar list of meeting commodities showed the scale of economic activity that results when participants attend meetings, sometimes accompanied by friends or relatives: tourism-related spending attributable to meetings activity included everything from supermarkets to cinemas, sports events to sightseeing tours, as well as golf, bicycling, canoeing, and kayaking.

ALL MEETING TYPES	DELEGATES	EXHIBITORS	SPEAKERS	TOTAL
Total spending	$21,673,887,000	$1,199,825,000	$391,043,000	$ 23,264,754,000
Total meeting registration fees (including optional components)	$ 5,102,012,000	$ 483,984,000	-	$ 5,585,995,000
Accommodation	$ 2,863,734,000	$ 167,122,000	$162,663,000	$ 3,193,519,000
Shopping (e.g., souvenirs, clothing, toiletries, etc.)	$ 1,811,893,000	$ 21,765,000	$ 285,000	$ 1,833,943,000
Long haul transport (from the city/locality you live in to the host city; e.g., air travel, long-distance train or coach, vehicle fuel costs if you drove)	$ 2,946,425,000	$ 47,027,000	$ 78,761,000	$ 3,072,213,000
Local and short haul transport (within the host city/locality, or excursions outside of the host city/locality; e.g., taxi, local public transport, rail or bus, car rental)	$ 1,745,453,000	$ 7,515,000	$ 6,943,000	$ 1,759,911,000
Food and beverage from restaurants, cafes and bars	$ 3,667,997,000	$ 16,913,000	$ 88,211,000	$ 3,773,121,000
Food beverage from retail outlets (e.g., supermarkets)	$ 1,095,797,000	$ 105,103,000	$ 32,692,000	$ 1,233,591,000
Entertainment and recreation (e.g., theatre, cinema, sports events, golf, bicycling, canoeing, kayaking)	$ 1,147,242,000	$ 5,567,000	-	$ 1,152,809,000
Tours (e.g., sightseeing)	$ 536,211,000	$ 6,109,000	-	$ 542,320,000
Other	$ 757,123,000	$ 338,720,000	$ 21,488,000	$ 1,117,332,000

Meetings Activity in 2006

235,500 full-year jobs

The $32.2 billion in meetings spending in 2006 generated the equivalent of 235,500 full-year jobs. And the data show that meetings are an incredibly effective employment creator for other parts of the economy: only 31,900 (13.5%) of those jobs were concentrated in meetings industries.

- Of the 31,900 jobs generated by the delivery of meeting services and commodities in Canada, 16,000 were at meeting venues and 15,900 were among meeting organizers.
- Meetings activity supported 141,900 full-year jobs in the tourism sector, including 53,000 in food and beverage, 43,400 in accommodation, 21,800 in transportation, 17,800 in recreation and entertainment, and 5,900 in travel services.
- Meetings also generated 61,800 full-year jobs in industries outside the tourism sector.

ECONOMIC CONTRIBUTION OF MEETINGS ACTIVITY – EMPLOYMENT (THOUSANDS OF FULL-YEAR JOBS)	
Direct Effects	235.5
Indirect Effects	195.8
Induced Effects	152.2
Total Economic Contribution	583.5

Job creation is one of the areas where economic impact is frequently calculated to include the indirect effects that result when a sector spends on suppliers providing required goods and services (the "supply chain"), as well as the induced effects that occur when employees spend monies, from the wages and salaries earned, on food, shelter, and other personal or household expenses (goods and services outside of the "supply chain"). Meetings activity is no exception: in 2006, every direct full-year job in meetings supported another 1.48 positions in other parts of the Canadian economy.

In addition to the 235,500 full-year jobs in meetings, tourism, and other related industries, meetings activity supported, through indirect effects, an additional 195,800 jobs, and through induced effects 152,200 more positions, for a grand total of 583,500 full-year equivalent jobs.

The totals point to a sector that creates employment at a rate of one full-year equivalent job for every $55,155 in direct spending on meetings activity.

Meetings Activity in 2006

$71.1 billion in Industry Output

Another way of measuring an industry's direct, indirect, and induced effects is to look at its total *Industry Output*. Industry output refers to the "gross" level of economic output, for this reason, it results in a larger impact figure than other "net" economic contribution measures (such as GDP). For meetings activity in Canada in 2006, the direct economic effect was $32.2 billion, but indirect and induced effects accounted for $20.2 billion and $18.7 billion respectively, for total output of $71.1 billion. This means that every dollar spent on meetings activity in 2006 resulted in another $1.21 of spin-off activity in some other part of the economy.

ECONOMIC CONTRIBUTION OF MEETINGS ACTIVITY – INDUSTRY OUTPUT ($MILLIONS)	
Direct Effects	$32,183
Indirect Effects	$20,208
Induced Effects	$18,697
Total Economic Contribution	$71,088

$5.7 billion in direct tax revenues; $14.6 billion in total effect on taxes

Industries that are serious about documenting their economic impact rarely fail to measure the tax revenues they produce for federal, provincial/territorial, and municipal governments.

- In 2006, meetings activity returned direct revenues of $2.9 billion to the federal government, $2.4 billion to the provinces, and nearly $355 million to municipalities, for a total of $5.7 billion.
- Meetings activity produced $1.2 billion in direct income taxes, $732 million in direct social security contributions, $985 million in federal Goods and Services Tax (GST), $864 million in direct provincial sales taxes, nearly $1.2 billion in other federal and provincial taxes and service fees, $320 million in corporate taxes, and $355 million in direct municipal taxes.

When calculating the impact of the indirect and induced effects on the economy the total effect on taxes reaches $14.6 billion dollars:

- In 2006, meetings activity returned total revenues (from direct, indirect and induced effects) of $7.3 billion to the federal government, $6.2 billion to the provinces, and nearly $1.1 billion to municipalities, for a total of $14.6 billion.
- Meetings activity produced a total of $3.8 billion in income taxes, $2.1 billion in social security contributions, $1.9 billion in federal Goods and Services Tax (GST), nearly $1.7 billion in provincial sales taxes, nearly $3 billion in other federal and provincial taxes

The End of the Beginning

The prospect of a pan-Canadian economic impact study was one of the cornerstones of the capital campaign that brought MPI Foundation Canada into existence. The Foundation is proud now to deliver on that promise.

But releasing this report is not the end: it is truly the end of the beginning. After a three-year process of project development and research, the next step is to connect the dots from the project results to the day-to-day business activity that the numbers represent.

- The sheer breadth of meetings activity in Canada drives home the point that meetings don't happen by accident, and they can't be organized off the side of somebody's desk.
  The study results underscore that meeting professionals offer a unique service based on an extensive body of knowledge, one that can now be linked to 235,500 direct and another 348,000 indirect or induced full-year jobs in Canada.
- The $32.2 billion spent on meetings in Canada has a cascading effect on businesses across the country, large and small.
  Meeting professionals in Canada and elsewhere have often struggled to demonstrate the value of their work and earn a coveted "seat at the table" commensurate with their skills, responsibilities, and strategic judgment. For individual members of MPI Canada, the study results demonstrate the significance of meetings as a source of revenue, jobs, and value, in a way that translates intuitively to the level of an individual meeting organizer or convention sales manager.
- The decision to build a customized economic accounting model of meetings activity in Canada based on the Tourism Satellite Account framework could have the farthest-reaching impact, for meeting professionals and for the economy as a whole.
  A reliable accounting of meetings activity leads to greater recognition of meetings as an economic driver, just as the introduction of the TSA did for tourism. The end result of this research will be for federal, provincial, and local governments to recognize that meetings matter, and to ensure that policies maximize the industry's impact as a catalyst for knowledge, action, and economic activity.

It was a monumental task to identify, measure, and summarize all the economic aspects of meeting activities that are dispersed across the wider Canadian economy and deeply embedded in a variety of other transactions and industrial processes. Even so, this study may ultimately achieve its greatest results as a foundation for further research. Throughout this project, MPIFC and its partners were acutely aware that they had set out to measure Canadian meetings by what they consume, rather than looking at what they produce.

The End of the Beginning

This was an absolutely essential first step. But any meeting professional who truly understands the mission of his or her industry will tell you that the return on investment from a well-executed meeting far exceeds its cost. Depending on the meeting and its purpose, that return may be defined by higher sales, heightened education and awareness, greater motivation, broader professional networks, or far-reaching changes in policy or practice. Invariably, though, the outcomes that result from a successful meeting should be several times the value of its inputs. Attaching solid, reliable numbers to that observation will be a challenging but exceptionally worthy focus for future research.

More immediately, it is through this lens that economic impact analysis ties in with MPI's broader focus on corporate social responsibility (CSR). $32.2 billion is a lot of spending on meetings activity, and a figure of this magnitude represents a professional obligation as well as a cause for celebration.

The purpose of this project was to measure the expenditures associated with meetings activity in Canada. However, the study results also underline the potential for meeting professionals to make a difference—through environmentally sustainable practices, or by delivering best-in-class adult learning programs. And in so doing, the study underscores the ethical obligation to operate in a way that reflects the "triple bottom line" of people, planet, and profit. Beyond the bounds of this study, there is evidence that Canadian meeting professionals are aligning rapidly with this new imperative, and the economic impact study shows just how much they can hope to achieve by doing so.

Methods: How the Study was Conducted

Consistent with the World Tourism Organization methodology, this study defined a meeting as a gathering of 10 or more people for four or more hours in a booked venue, convened to "bring together a number of people in one place" in order to "confer or carry out a particular activity." Any definition will leave out some activity, and this one is no exception. But one advantage of the UNWTO study is the opportunity to measure Canada's results against meetings activity in other country, as long as those countries use comparable methodologies.

The study was conducted in four phases:

Phase I: Measurement of *supply-side* meetings revenue and volume, based on an in-depth survey of 220 venue managers and 284 in-house and independent meeting organizers.

Phase II: Measurement of demand-side spending on meetings, based on a survey of 1,520 local, domestic/Canadian, United States, and international delegates, drawn from online consumer panels, and augmented by an online survey with 69 exhibitors and speakers.

Phase III: Use of economic modelling to extrapolate the direct economic contributions (spending, employment, tax revenues, wages) of meetings activity in Canada, based on the Phase I and II research results.

Phase IV: Use of standard economic analysis to estimate the industry's indirect and induced economic impact

It Took a Community: Thanks to our Sponsors

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For further information on the Canadian Economic Impact Study, please consult www.mpiweb.org

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