



The
Economic Significance
of Meetings to the
U.S. Economy

Convention Industry Council

February 2011

Executive Summary



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This Economic Significance Study (ESS), conducted by PricewaterhouseCoopers, quantifies a vital industry that contributes billions of dollars to the national economy, while creating millions of jobs in almost every city. The ESS will provide CIC and its member organizations with a clear and credible statistical base on which to gain recognition for the industry as a vital economic force in our country, and the outcomes will assist the nation's political and business leaders to better understand the economic weight of the meetings, events, incentive and exhibitions industry to local communities.

While this study focuses on the value of the industry to the overall economy, the many other benefits of the meetings, industry should not be overlooked. To the millions of people who attend conventions and exhibitions annually, these events provide an invaluable source of adult and continuing education, a forum for developing and maintaining professional contacts, an effective and efficient means of promoting sales efforts, and medium for information exchange leading to innovation and research breakthroughs.

Assisting PwC in this study effort was a team of industry researchers, the Economic Significance Study Research Task Force, who ensured this study produced the first definitive, quantitative, and research-based analysis of the economic contribution of face-to-face meetings to the U.S. economy. Those task force members included:

David Sheatsley, Director, Marketing Research, U.S. Travel Association, Chair
Suzanne Cook, former Senior Vice President, Research, U.S. Travel Association
Monica Dignam, Chief Research Officer and Managing Director, ASAE
Sherrif Karamat, Chief Operating Officer, Professional Convention Management Association
Steve Moore, President & CEO, Phoenix Convention and Visitors Bureau
Didier Scaillet, Chief Development Officer, Meeting Professionals International and MPI Foundation
Gregg Talley, Chief Strategy Executive, Convention Industry Council
Tien X. Tian, Vice President & Chief Economist, U.S. Travel Association
Ruth Trojan, Nadler & Associates

We would also like to thank Scott Meis, President, Scott M. Meis Research Associates for his assistance and guidance.



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February 11, 2011

Ms. Karen Kotowski, CAE, CMP
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Dear Ms. Kotowski:

PricewaterhouseCoopers LLP ("PwC") has performed certain services to assist the Convention Industry Council, American Society of Association Executives, Professional Convention Management Association, Meeting Professionals International, and Destination and Travel Foundation (collectively, the "Managing Partners" or "you," or "Client") in the assessment of the Economic Significance of U.S. Meetings. Our services were performed and this Deliverable (which is hereafter referred to as "Report") was developed in accordance with our engagement letter dated November 12, 2009 and are subject to the terms and conditions included herein. Our services were performed in accordance with Standards for Consulting Services established by the American Institute of Certified Public Accountants ("AICPA"). The procedures we performed did not constitute an examination or a review in accordance with generally accepted auditing standards or attestation standards. Accordingly, we provide no opinion, attestation or other form of assurance with respect to our work or the information upon which our work was based. We did not audit or otherwise verify the information supplied to us in connection with this engagement, from whatever source, except as may be specified in this Report.

Our work was limited to the specific procedures and analysis described herein and was based only on the information made available through November 18, 2010. Accordingly, changes in circumstances after this date could affect the findings outlined in this Report.

This Report has been prepared pursuant to an engagement between PwC and its Client. As to all other parties, it is for general information purposes only, and should not be used as a substitute for consultation with professional advisors.

We appreciate the opportunity to assist you with this matter. If you have any questions or we can be of further assistance, please contact Robert Canton at (813) 218-2917 or via email at robert.canton@us.pwc.com.

Very truly yours,

PricewaterhouseCoopers LLP

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Introduction & Executive Summary

I. Introduction & Executive Summary

A summary of the key findings have been provided in this section. The full report should be read in its entirety to understand the background, methods, and assumptions underlying the study's findings.

Background & Objectives

Over the past several decades, the meetings sector has emerged as a significant contributor to national economies; however, the value of the sector has been difficult to measure due to a lack of research and consistency within and among various countries. In 2006, the United Nations World Tourism Organization (UNWTO), along with the International Convention and Congress Association (ICCA), Meeting Professionals International (MPI), and Reed Travel Exhibitions, spearheaded an initiative to measure the economic activity of meetings on a national scale. The UNWTO and its partners developed definitions for meetings, recommended a methodology to quantify meetings activity through an extension of national tourism satellite accounts, and created a pilot program and guidelines for individual countries to quantify meetings activity.

As a result of the UNWTO's initiative, efforts to measure the economic significance of meetings have gained momentum in recent years. For example, the MPI Foundation Canada sponsored a study (released in 2008) that quantified the economic contribution of meetings activity in Canada (*The Economic Contribution of Meetings Activity in Canada*). However, research that specifically addresses the economic significance of meetings in the United States has been limited. With enhanced scrutiny on the meetings sector in recent times, the Convention Industry Council (CIC) initiated a plan to demonstrate the value of face-to-face meetings and study the economic significance of the meetings in the U.S. A CIC Task Force, which included the following leading industry organizations, was formed to support this effort:

- American Hotel and Lodging Association (AH&LA)
- ASAE
- Association of Destination Management Executives (ADME)
- Convention Industry Council (CIC)
- Destination Marketing Association International (DMAI)
- Destination & Travel Foundation
- Financial & Insurance Conference Planners (FICP)
- International Association of Conference Centers (IACC)
- International Association of Exhibitions and Events / Center for Exhibition Research / Exhibition Industry Foundation
- International Special Events Society (ISES)
- Meeting Professionals International (MPI) & MPI Foundation
- National Speakers Association (NSA)
- Professional Convention Management Association (PCMA) / PCMA Education Foundation
- Site & Site Foundation
- U.S. Travel Association

PricewaterhouseCoopers LLP (PwC) was engaged by CIC to lead the effort of estimating the economic significance of meetings in the U.S. in 2009. Assisting PwC in this effort was a team of industry researchers (the Economic Significance Study Research Task Force or “the RTF”), which included representatives of ASAE, DMAI, Destination & Travel Foundation, MPI, PCMA, and U.S. Travel Association. This study represents the first definitive, quantitative, and research-based analysis of the economic contribution of face-to-face meetings to the U.S. economy.

It should be noted that this study seeks to quantify the "economic significance" of meetings, which should not be confused with the "economic impact." For purposes of this study, the concept of "impact" is reserved for changes to the economy that may result from a specific event or shock to the industry, whereas the "significance" or "contribution" measures the size and overall significance of the sector within an economy.

Key objectives for this study included:

- Develop common data and language that stakeholders can use when discussing meetings and events.
- Provide data that can be used at the national level to articulate the economic contribution that meetings and events represent to the overall economy.
- Provide a basis for ongoing benchmarking, forecasting, and trend analysis.
- Collect reliable data that can be used to influence government and international agencies to alter national statistics systems to include aspects of the economic activity of meetings and extend tourism satellite accounts to include and reveal meeting activities related to tourism.
- Adopt the definitions and approach developed by the UNWTO to estimate the contribution of the meetings industry comparable to measures for other countries.
- Develop a replicable methodology that allows for meaningful comparative benchmarking internationally.

While this study aims to achieve ambitious objectives, it is also important to acknowledge certain limitations of the study.

- The definition of meetings is based on guidelines established by the UNWTO, which specifically exclude meetings of a certain type, size, length, and location. As such, the study does not capture the full potential contribution of all meeting-related activity. The economic activity associated with this segment specifically excluded from the study may be significant.
- Other effects of meetings such as those on productivity, knowledge sharing/training, and social benefits were not evaluated as part of this study.
- This study presents the economic significance of meetings at the national level and thus the meeting characteristics and economic activity for a particular destination will vary from these national estimates.

Study Guidelines

The definitions and guidelines outlined by the UNWTO served as a foundation for this study. For the definition of meetings, UNWTO and its partners define meetings as a general term indicating the coming together of a number of people in one place to confer or carry out a particular activity. The key purposes of meetings are to motivate participants, conduct business, share ideas, and learn. Based on further refinement by the UNWTO and for purposes of this study, the term "meeting" and its description above was defined to refer to a gathering of 10 or more participants for a minimum of four hours in a contracted venue. Meetings included conventions, conferences, congresses, trade shows and exhibitions,

incentive events, corporate/business meetings, and other meetings that meet the aforementioned criteria. Meetings excluded social and recreation activities, certain educational and political activities, and gatherings for sales of goods/services such as consumer shows.

UNWTO also outlined components of the meetings sector to include "core" meetings industries (specialized meetings organizers; convention, congress, and exhibition centers; incentive houses and destination management companies; and convention and visitor bureaus) and extend the sector to other supporting entities such as accommodations, transportation, technical equipment, food services, speakers' representation services, stand construction, other support services, and auxiliary businesses. Several of the above industries such as accommodations, transportation, and food services also relate to travel and tourism activity. Given the overlap of meetings and travel and tourism activity, UNWTO recommended that components of the meeting sector be identified through a complimentary set of tables to a nation's tourism satellite account. For the purposes of this study, an extended approach to quantifying the significance of meetings activity was used, which captures the activities of the core meetings industries, meetings-related components of the travel and tourism industries as an extension of the Travel & Tourism Satellite Account (TTSA), and other relevant industries.

Research Overview

Research was a critical step in the process for quantifying the economic significance of meetings. The study team of PwC and the RTF conducted an extensive research effort involving two key areas: the first involved the collection of primary data through surveys, and the second involved research and analyses of industry, government, and proprietary sources (collectively referred to as secondary data). Surveys and secondary data covered both the supply-side and demand-side of the meetings sector related to meeting volume and spending. Over 6,000 surveys were received from meeting organizers (both "in-house" and "independent/third-party"), meeting venue managers, destination marketing organizations, meeting delegates, and exhibitors.

These research and analysis efforts were conducted in parallel to each other, whereby PwC analyzed the results of each effort and reconciled the data and analyses to develop the basis for the estimates of economic significance. PwC compared survey results with secondary data, identified any discrepancies and potential sampling bias, and developed estimates for volume and spending that incorporated the primary and secondary research, professional judgment, and industry experience. Please note that throughout this report, figures were rounded and that some totals and subtotals may not add due to this rounding.

Meetings Volume Estimates

Based on the study's findings, in 2009 nearly 1.8 million meetings took place in the U.S, with these meetings attended by an estimated 205 million participants. As illustrated in Table 1, the majority of these meeting participants (52 percent) attended corporate/business meetings, followed by 25 percent attending conventions/conferences/congresses.

Table 1
Number of Meetings and Participants by Meeting Type

Meeting Type	Meetings	Participants	% Participants
Corporate/Business Meetings	1,266,200	107,187,000	52%
Conventions/Conferences/Congresses	269,800	51,104,000	25%
Trade Shows	10,700	24,800,000	12%
Incentive Meetings	66,000	8,154,000	4%
Other Meetings	178,100	13,479,000	7%
Total	1,790,800	204,724,000	100%

Direct Spending

Direct spending estimates provided the building blocks for estimating the total economic significance of meetings. Direct spending is defined as *spending within the U.S. economy from purchases of goods and services attributable to the activity*. Total direct spending associated with U.S. meetings activity in 2009 is estimated at over \$263 billion. This spending is presented at the commodity level in Table 2. As illustrated, \$113 billion or 43 percent of the direct spending in the meetings industry is on travel and tourism commodities such as lodging, food service, and transportation; hence, that portion is already captured by the Travel & Tourism Satellite Account. However, the majority of direct spending is not travel-related, with \$151 billion or 57 percent involving meeting planning and production costs, venue rental, and other non-travel & tourism commodities that fall outside the TTSA--suggesting the reach of the meetings industry affects the U.S. economy broadly.

Table 2
Direct Spending by Commodity

Commodities	Direct Spending (in millions)	Percent
<u>Travel & Tourism Commodities</u>		
Accommodation	\$34,896	13%
Food and Beverage	26,389	10%
Air Transportation	17,814	7%
Retail	7,223	3%
Gasoline	6,645	3%
Recreation and Entertainment	6,192	2%
Car Rental	5,512	2%
Travel Services and Other Tourism Commodities	3,359	1%
Other Transportation	2,441	1%
Urban Transit	1,751	1%
Rail & Water Transportation	554	<1%
Subtotal	\$112,776	43%
<u>Meetings & Other Commodities</u>		
Meeting Planning & Production	\$108,968	41%
Venue Rental	10,565	4%
Other Meetings-related Commodities	31,135	12%
Subtotal	\$150,668	57%
Total Direct Spending	\$263,444	100%

Note: Commodities include both goods and services

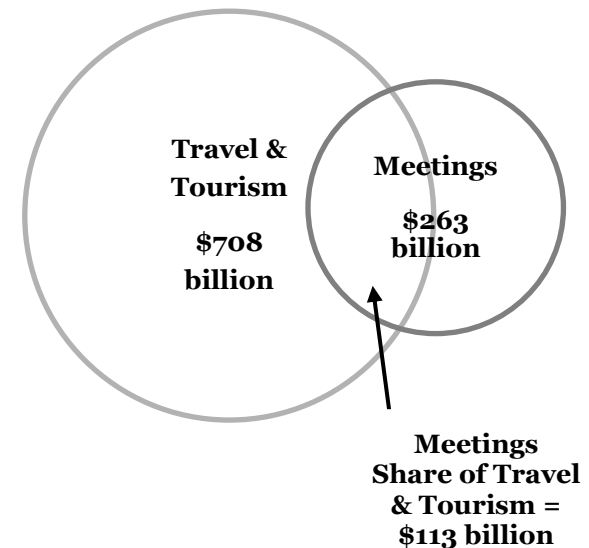
In other words, the meetings sector can be described as being comprised of two portions: one portion overlapping (or an extension of) the travel and tourism sector and the remaining portion belonging to other sectors. Of the \$708 billion in direct tourism output in the U.S. in 2009, \$113 billion or 16 percent is the result of the meetings industry.

Total Economic Significance

Direct spending, which served as input for the input-output economic modeling process, reflects the spending in those industries that comprise the meetings industry. Indirect spending is attributable to the suppliers to the meetings industry, and the induced spending arises from spending by the employees of the meetings industry and its suppliers. Together, direct, indirect, and induced spending contributions comprise the total contribution of meetings activity to the U.S. Economy.

Economic contributions are presented in terms of the following:

- **Output:** Economic concept akin to sales or revenue.
- **Contribution to GDP:** Also known as the "value added." Refers to the additional value created at a particular stage of production. It is a measure of the overall importance of an industry. Value added consists of: employee compensation, proprietors' income, income to capital owners from property, and indirect business taxes.
- **Employment:** Consisting of full-time and part-time jobs.
- **Labor income:** Including wages and salaries, benefits, and proprietors' income.
- **Taxes:** Including federal taxes (personal income, excise, custom duty, social insurance contribution, and other taxes) and state and local taxes (corporate income, personal income, property, sales, social insurance contribution, and other taxes).



The economic significance of meetings activity in terms of output, contribution to GDP, employment, and labor income are presented in Table 3. As illustrated, total output for 2009 related to meetings activity is estimated at \$907 billion, while the total contribution to GDP is \$458 billion. Meetings activity supported 6.3 million jobs and generated \$271 billion in total labor income.

Table 3
Total Economic Contributions

Economic Contributions	Industry Output (in millions)	Contribution to GDP (in millions)	Employment	Labor Income (in millions)
Direct effects	\$263,443	\$106,096	1,650,000	\$59,512
Indirect effects	283,521	151,507	2,164,000	92,848
Induced effects	<u>360,279</u>	<u>200,308</u>	<u>2,483,000</u>	<u>118,649</u>
Total economic contributions	\$907,243	\$457,911	6,297,000	\$271,009

The tax effects of the meetings were also significant in 2009, with \$64 billion in federal taxes generated by the industry, and an additional \$46 billion at the state and local level, as presented in Table 4.

Table 4
Total Tax Contributions

Taxes	Federal (in millions)	State & Local (in millions)
Direct effects	\$14,340	\$11,270
Indirect effects	21,349	13,398
Induced effects	<u>28,172</u>	<u>21,231</u>
Total tax contributions	\$63,861	\$45,899

Meetings Direct Contribution to GDP Compared to Other Industries

According to the Bureau of Economic Analysis (BEA), U.S. GDP in 2009 totaled \$14.1 trillion. As presented previously, in Table 3, the meetings industry directly contributed \$106 billion to this total. While this in and of itself may not seem significant, it is helpful to provide further context by comparing this direct contribution to GDP and employment associated with meetings activity to other U.S. industries. Other industry contributions were based on 2009 data released by the BEA on a NAICS code level. As illustrated in Table 5, the meetings industry ranks higher than several high-profile industries, both in terms of its contribution to U.S. GDP, and the number of full- and part-time workers employed.

Table 5
Direct Contribution to GDP and Employment of Select Industries

Industry	Estimated Value Added to GDP (in millions)	Full & Part-time Employment (in thousands)
Health care and social assistance	\$1,058,000	16,237
Broadcasting and telecommunications	356,000	1,276
Food service and drinking places	277,000	9,464
Legal services	219,000	1,150
Computer systems design and related services	170,000	1,426
Oil and gas extraction	142,000	161
Manufacturing petroleum and coal products	120,000	114
Truck transportation	113,000	1,313
Accommodation	109,000	1,755
Meetings	106,096	1,650
Manufacturing motor vehicles, bodies and trailers, and parts	78,000	675
Information and data processing services	76,000	309
Performing arts, spectator sports, museums	71,000	545
Air transportation	62,000	464
Motion picture and sound recording industries	60,000	365
Amusements, gambling, and recreation industries	56,000	1,416
Rail transportation	31,000	187

Appendices

Appendix A: Glossary

"Meeting" Defined

As defined by the UNWTO, Reed Travel Exhibitions, ICCA and MPI, a meeting is a general term indicating the coming together of a number of people in one place, to confer or carry out a particular activity. The key purposes of meetings are to motivate participants, conduct business, share ideas, and learn. Frequency can be on an ad-hoc basis or according to a set pattern, as for instance annual general meetings, committee meetings, etc.

Based on further refinement by the UNWTO and for purposes of this report, the term "meeting" and its description above was defined to refer to a gathering of 10 or more participants for a minimum of 4 hours in a contracted venue. Meetings include conventions, conferences, congresses, trade shows and exhibitions, incentive events, corporate/business meetings, and other meetings that meet the aforementioned criteria. Meetings exclude social activities (wedding receptions, holiday parties, etc.), permanently established formal educational activities (primary, secondary or university level education), purely recreational activities (such as concerts and shows of any kind), 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), which would rather fall under the scope of retail or wholesale trade.

Meeting Aim

To bring together people for a common purpose to conduct business, share ideas, learn, and hold discussions on professional, scientific, or business matters.

Meeting Specifications

- Meeting length: minimum of 4 hours (i.e. half a day)
- Meeting size: minimum of 10 participants
- Meeting venue: contracted venue (in-house meeting venues are excluded)

Meeting Type

Meeting types in this definition include conventions, conferences, congresses, trade shows and exhibitions, incentive events, corporate/business meetings, and other meetings. Meeting types specifically excluded from this definition include the following:

- social activities (wedding receptions, holiday parties, etc.)
- permanently established formal education activities (primary, secondary, or university level education)
- purely recreational and entertainment activities (such as concerts and shows of any kind)
- political campaign rallies
- gatherings of consumers or would-be customers by a company for the purpose of presenting specific goods or services for sale (consumer shows), which would rather fall under the scope of retail or wholesale trade.

Meeting Types

Meetings should be classified by the primary activity of the meeting. For example, a convention or conference that included exhibitions as an ancillary activity, but not the primary activity, should be classified as a conference/convention/congress rather than a trade show/business exhibition.

Meeting Type	Definition
Conferences/ Conventions/ Congresses	A general term covering all non business-oriented gatherings of participants at a predetermined site and time to attend an organized meeting in which they have an interactive, debating, and/or competitive role, and of which the theme or purpose may be of any nature. These meetings are hosted by professional, trade, or other non-corporate organizations. Conferences/conventions/congresses may include seminars. (Please also refer to definitions of Conference, Convention, and Congress below).
Conference	<ol style="list-style-type: none"> 1) Participatory meeting designed for discussion, fact-finding, problem solving and consultation 2) An event used by any organization to meet and exchange views, convey a message, open a debate or give publicity to some area of opinion on a specific issue <p>No tradition, continuity, or periodicity is required to convene a conference. Although not generally limited in time, conferences are usually of short duration with specific objectives. Conferences are generally on a smaller scale than congresses.</p>
Convention	<ol style="list-style-type: none"> 1) A general and formal meeting of a legislative body, social, or economic group in order to provide information, deliberate or establish consent or policies among participants. In the United States, the term is used to describe large, usually national meetings of business circles, for discussion and/or commercial exhibition 2) An event where the primary activity of the attendee is to attend educational sessions, participate in meetings/discussions, socialize, or attend other organized events <p>There is a secondary exhibit component.</p>
Congress	<ol style="list-style-type: none"> 1) The regular coming together of large groups of individuals, generally to discuss a particular subject. A congress will often last several days and have several simultaneous sessions. The length of time between congresses is usually established in advance of the implementation stage and may be either pluri-annual or annual. Most international or world congresses are of the former type while national congresses are more frequently held annually 2) Meeting of an association of delegates or representatives from constituent organizations 3) European term for convention
Seminar	<ol style="list-style-type: none"> 1) Lecture and dialogue allowing participants to share experiences in a particular field under the guidance of an expert discussion leader 2) A meeting or series of meetings from 10 to 50 specialists who have different specific skills but have a specific common interest and come together for training or learning purposes <p>The work schedule of a seminar has the specific objective of enriching the skills of the participants.</p>
Trade show/business exhibition	<ol style="list-style-type: none"> 1) An exhibition of products and/or services held for members of a common industry. The primary activity of attendees is visiting exhibits on the show floor. These events focus primarily on business-to-business

Meeting Type	Definition
	<p>relationships, but part of the event may be open to the general public</p> <p>2) Display of products or promotional material for the purpose of public relations, sales and/or marketing</p>
Incentive event	<p>A reward event intended to showcase persons who meet or exceed sales or production goals. For the purposes of this survey, incentive events refer to the meeting portion of an incentive program.</p>
Corporate/business meeting	<p>1) Business-oriented meeting usually hosted by a corporation, in which participants represent the same company, corporate group or client/provider relationships</p> <p>2) Gathering of employees or representatives of a commercial organization</p> <p>Usually, attendance is required and travel, room and most meal expenses are paid for by the organization.</p>
Other Meeting Type	<p>A gathering not described by the meeting types described above, but still meets the criteria for meeting duration (4 hours or more), number of participants (10 or more) and meeting location (held in a contracted venue).</p>

Attendee Origin

Origin	Definition
Local	Attendees who traveled less than 50 miles to attend a meeting and did not stay overnight in paid accommodations.
Domestic	Attendees who traveled more than 50 miles to attend a meeting or who stayed overnight in paid accommodations.
Foreign	Attendees who traveled from outside of the United States (including U.S. territories) to attend the meeting.

Travel

Term	Definition
Travel	For purposes of this study, attendees that travel to meetings are those that stay overnight away from home in paid accommodations or travel more than 50 miles from their primary residence to attend the meeting. This definition of travel aligns with definitions outlined by the U.S. Travel Association, UNWTO, and BEA (see definitions below).
Travel (U.S. Travel Association)	The definition of travel used for this study aligns with the following definitions outlined by the U.S. Travel Association, UNWTO, and BEA:
Tourism (UNWTO)	According to the U.S. Travel Association, there is no commonly accepted definition of <i>travel</i> in use at this time; however, the U.S. Travel Association has defined travel as activities associated with all overnight trips away from home in paid accommodations, and day and overnight trips to places 50 miles or more, one way, from the traveler's origin.
Visitor (BEA)	The UNWTO defines <i>tourism</i> as the activities of persons travelling to and staying in places outside their usual environment, for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited The BEA defines <i>visitor</i> as a person who travels outside of his or her usual environment for less than a year or who stays overnight in a hotel or motel. The visitor may travel for pleasure or business. Visitors exclude travelers who expect to be compensated at the location of their visit (such as migrant workers, persons traveling to new assignments, and diplomatic and military personnel traveling from their duty stations to their home countries). The BEA defines "usual environment" as the area of normal, everyday activities, within 50 to 100 miles of home.

Venue Types

Host Type	Definition
Purpose-built meeting facility without lodging	Convention center, exhibition hall, non-residential conference center, multi-purpose event center, etc. that does not have lodging. Lodging accommodations are typically booked under a separate contract.
Meetings facilities with lodging	Hotel, resort, casino, residential conference center, etc. that includes meeting facilities. Lodging accommodations are typically attached and sold with meeting space under one contract.
Other venues with meeting facilities	Other venues, not specifically built for meetings, but which have facilities that are used for meetings (e.g. university/college, arena, stadium, park, racetrack, museum, theater, restaurant, etc.) Lodging accommodations are typically booked under a separate contract. For universities/colleges, these meeting should include facilities such as lecture halls, conference rooms, classrooms, etc., but exclude an on-campus conference center or hotel.

Survey Audience Types

Survey Audience	Description
Meeting organizers	Meeting organizers included both "In-house" meeting organizers and "Independent/Third-party" meeting organizers: <ol style="list-style-type: none"> a) In-house organizers are responsible for organizing the meeting for their own organization which is hosting or sponsoring the meeting b) Independent/Third-party organizers are contracted to organize the meeting on behalf of the meeting host or sponsor organization
Venue managers	Managers of the following types of venues: <ol style="list-style-type: none"> a) purpose-built meeting facilities (without lodging) such as conference centers and convention centers; b) meeting facilities with lodging (hotels, motels, resorts, etc.); and c) meeting facilities at other venues, such as at universities/colleges, arenas, stadiums, parks, racetracks, museums, theaters, restaurants, etc.
Destination marketing organizations	Not-for-profit organizations charged with representing a specific destination and helping the long-term development of communities through a travel and tourism strategy; also referred to as convention and visitor bureaus (CVB).
Delegates	A person who attends an event primarily to visit exhibits or attend meetings and/or conference sessions (excludes exhibitors, media, speakers, and companions), a registered meeting participant, or a voting representative at a meeting.
Exhibitors	A person or firm that displays its products or services at an event, or an event attendee whose primary purpose for attending the event is to staff a booth/stand.

Appendix B: Economic Modeling

This study has quantified the direct, indirect, and induced contributions of meetings activity in the U.S. in terms of employment, labor income (including wages and salaries and benefits, as well as proprietors' income), output, and value added (i.e., GDP).¹ The direct contribution is measured as the employment (full-time and part-time jobs), labor income, output, and GDP within the industries identified as "direct beneficiaries" of meetings activity with respect to the source of spending. The indirect contribution is measured as the employment, labor income, output, and GDP occurring within other industries that provide goods and services to the "direct" industries. The induced impact is measured as the employment, labor income, output, and GDP resulting from household spending of income earned either directly or indirectly from the meetings activity. Together, the direct, indirect, and induced contributions comprise the total contribution of the meetings activity in the U.S.

The economic impact analyses in the study rely on the IMPLAN economic model, a well-known input-output modeling system developed by the Minnesota IMPLAN Group for estimating economic impacts and is similar to the Regional Input-Output Modeling System developed by the U.S. Department of Commerce. The model is primarily based on government data sources. It can address a wide range of impact topics in a given region (county, state, or the country as a whole).

IMPLAN is built around an "input-output" table that relates the purchases that each industry has made from other industries to the value of the output of each industry. To meet the demand for goods and services from an industry, purchases are made in other industries according to the patterns recorded in the input-output table. These purchases in turn spark still more purchases by the industry's suppliers, and so on. Meanwhile, employees and business owners make personal purchases out of the additional income that is generated by this process, sending more new demands rippling through the economy. Multipliers describe these iterations. The Type I multiplier measures the direct and indirect effects of a change in economic activity. It captures the inter-industry effects only, i.e. industries buying from local industries. The Type SAM (Social Accounting Matrix) multiplier captures the direct and indirect effects. In addition, it also reflects induced effects (i.e. changes in spending from households as income increases or decreases due to the changes in production).

The IMPLAN model used for this study is based on economic relationships from 2008. PwC adjusted these relationships to be consistent with the 2009 meetings activity.

Direct Contributions

This report distinguishes three major industries as the direct beneficiary industries with respect to the source of meetings activity spending: (1) defined meetings industries; (2) travel and tourism industries; and (3) other industries. All other expenditures (such as those by service

¹ Value added refers to the additional value created at a particular stage of production. It is a measure of the overall importance of an industry. Value added consists of: employee compensation, proprietors' income, income to capital owners from property, and indirect business taxes (i.e., those borne by consumers rather than producers).

providers/vendors) are considered secondary spending and used only to quantify indirect and induced contributions of meetings activity. This accounting framework ensures that there is no double counting for direct, indirect, and induced contributions of meeting activity in the U.S.

The defined meetings industries include meetings venues and meeting organizers (independent/third-party). Travel and tourism industries cover the components included in the TTSA, including accommodations, food services and drinking places, transportation, retail, recreation and entertainment, travel services, and other miscellaneous tourism industries. Other industries that received direct meetings activity spending primarily include those that provide goods and services to exhibiting companies.

The detailed direct spending data from meeting participants and non-participants were mapped to relevant industries in the IMPLAN model and used as a change in output to estimate direct jobs, labor income, and GDP generated by meetings activity. Spending on retail (such as gasoline) has been appropriately adjusted in the IMPLAN model through the "marginizing" procedure, which helps convert "purchase prices" to "producer's prices" used in input-output models like the IMPLAN model.

Indirect and Induced Contributions

Spending by meeting organizers/hosts outside of the defined meetings industries were mapped to relevant IMPLAN producing sectors and used to estimate the indirect and induced contributions of meetings activity spending by meeting organizers/hosts. For other direct meetings activity industries, their estimated direct employment was used to quantify the remaining indirect and induced contributions of meeting activity spending.

Appendix C: Secondary Research Sources

The following secondary research sources were referenced for this study.

Organizations:

- American Hotel & Lodging Association (AHLA)
- ASAE
- Center for Exhibition Industry Research (CEIR)
- Convention Industry Council (CIC)
- Collegiate Conference and Events Directors-International (ACCED-I)
- Destination Marketing Association International (DMAI)
- Facilities Online
- Healthcare Convention and Exhibitors Association (HCEA)
- Incentive Federation Inc.
- International Association of Assembly Managers (IAAM)
- International Association of Conference Centers (IACC)
- International Convention and Congress Association (ICCA)
- Meetings & Conventions (M&C)
- Meetings Media
- Meeting Professionals International (MPI)
- PricewaterhouseCoopers (PwC)
- Professional Convention Management Association (PCMA)
- Religious Conference Management Association (RCMA)
- Site
- Smith Travel Research
- TNS
- Trade Show Exhibitors Association (TSEA)
- Trade Show Week
- Unique Venues

- U.S. Census Bureau
- U.S. Bureau of Economic Analysis (BEA)
- U.S. Bureau of Labor Statistics (BLS)
- U.S. Office of Travel & Tourism Industries (OTTI)
- U.S. Travel Association

The following documents were reviewed as part of the analyses conducted in developing the estimates contained herein:

- Business Travel News' *Corporate Travel Index* (March 29, 2010)
- CEIR *Exhibition Industry Census* (December 2005)
- CEIR *Exhibition Industry Index* (2009)
- DMAI MINT data (2009)
- DMAI convention expenditure data (October 2006)
- *The Economic Contribution of Meetings Activity in Canada* (2008, Maritz Research Canada and The Conference Board of Canada)
- M&C *Meeting Facilities Search* (formerly *Official Meeting Facilities Guide*) (online search engine)
- M&C *Meetings Market Report* (June 2008, CIC Research, Inc.)
- MPI *FutureWatch* (January 2010)
- PCMA *Annual Meetings Market Survey* (March 2008)
- PCMA *Meeting Planner Intentions Survey* (June 2010)
- PwC *Convention Center Report* (2009)
- PwC *Hospitality Directions* (August 2010)
- Oxford Economics' *The ROI of Business Travel* (September 2009)
- Trade Show Week *Databook* (October 2009)
- Trade Show Week *Major Exhibit Hall Directory* (September 2009)
- U.S. Travel Association "Travel Economic Impact Model"

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- Council of Engineering and Scientific Society Executives (CESSE)
- Destination Marketing Association International (DMAI)
- Financial and Insurance Conference Planners (FICP)
- International Association of Assembly Managers (IAAM)
- International Association of Conference Centers (IACC)
- International Association of Exhibitions & Events (IAEE)
- International Special Events Society (ISES)
- Meetings Professionals International (MPI)
- National Coalition of Black Meeting Planners (NCBMP)
- Professional Convention Management Association (PCMA)
- Society of Government Meeting Professionals (SGMP)
- Site
- Trade Show Exhibitors Association (TSEA)

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