



***The Economic  
Significance of  
Meetings in  
Mexico***

September 2011

# Executive Summary

## GENERALS STATISTICS

- In 2010, 197,400 meetings were held, consisting of 131 thousand corporate meetings, 28 thousand conferences and conventions, 6,300 incentive trips, 4,400 consumer shows and the rest consisted of other event types.
  - 159,900 events were held in hotels with infrastructure for conventions and 25,700 at Convention Centers. The rest were held in other venues such as museums, stadiums, universities, etc.
- 23 million attendees participated in these events:
  - 85% were delegates, 9% exhibitors and the remainder included speakers, escorts, and other participants.
  - 10.2 million (44%) participated in corporate events, 5.3 million (23%) in fairs, 5 million (22%) in conferences and conventions, 560,000 (2%) in incentives and the rest consisted of other meeting types.
  - 49% of the participants were local (i.e. residents of the event location or had traveled less than 75 km, and were not considered tourists), 47 per cent were domestic participants with overnight stays and 4% came from another country.
  - Of the total number of tourists to Mexico, 7% came from another county to participate in Meetings; and spent \$1,092 per person per trip (average amount spent by an international tourist in 2010 \$733, exceeding in 49 percent the regular visitor). They provide 11% of the total tourist expenditures. It is important to note that the \$1,092 figure is underestimated, as it only considers participant costs incurred. During incentive and corporate meetings, lodging and some meals are covered directly by the company or organizer.
- Meetings in Mexico generated 24.3 million room nights:
  - 46 per cent (11 million) were corporate events.
  - 23% (6.3 million) were conventions, congresses and conferences.
  - 20% (4.8 million) were consumer trade shows and events.
  - 6% (1.4 million) were incentive trips.
  - The rest (3%) were other meetings types.
- On average, meeting tourists stayed 2.06 nights per person.
  - On an average, incentive trip tourists stayed 2.5 nights; corporate meeting attendees 2.3 nights; conventions, congress and conference attendees 2.1 nights and consumer fairs and events 1.6 nights.

## EXPENDITURES

- The spending breakdown for meetings in Mexico ascends to 18.1 billion dollars, which consists of 18 per cent of total travel and tourism demand in Mexico. This consists of three categories: participant expenditures (58%) cost of event production (28%) and other direct costs (14%):
  - Total expenditures for corporate meetings are 44 per cent (8 billion), consumer trade shows (4.6 billion and 26 per cent), conventions and congresses (3.9B and 22%), incentives (573 million and 3%), and others are 5%.
- Participants spend 10,510 million American dollars.
  - 42% of these represent registration fees, 18% lodging, 15% food and beverages, 9% air transportation and 8% land transportation, among others.
  - 21% came from local participants, 69% from domestic participants (tourists) and 9% from international tourists.

- 58% represent delegate expenditures and 34% represent exhibitors' expenditures.
- The meeting planners invest 5. billion dollars to organize the events. Total expenditures amounted to 6.8 billion dollars however part is covered by participants. This difference is deducted to avoid duplication.
  - Total spending by organizers consisted of 24% in food and beverages, 18 per cent for location rental, and others.
- Total tourism meeting expenditures in Mexico ascends to a total of 18.1 billion dollars, 48% is tourism related and the rest relates to other industries.
- The per capita meeting participant expenditure in Mexico (both local, domestic and international) is \$785 dollars. The average Mexican tourist spends an estimated 5,151 pesos, so this figure exceeds that amount by 92%.
  - Incentive travel participants had average expenditures of \$1,024 (United States dollars), fair participants \$869 (United States dollars); corporate travelers \$787 (United States dollars); and conventions and congress participants \$772 (United States dollars).
- According to the Tourism Satellite Account in Mexico, guests spend 12.8 billion dollars. \$2.6 billion of this amount, which represents 21 per cent, is meeting derived revenue.
  - Likewise, 24% of tourism food and beverages revenue is generated through meetings, 23% represents airline transportation and 5% represents ground transportation, etc.

## ECONOMIC RELEVANCE OF MEETINGS IN MEXICO

- The contribution to the gross domestic product ascends to 12.0 billion dollars which represents 1.43% of the national GDP. Indirectly it contributes another 13 billion dollars; however, contribution to GDP must only consider direct effects.
- Meetings in Mexico generate 32.5 billion dollars in sales.
  - Sales and direct consumption correspond to 18.1 billion US dollars in the nation's economy.
  - They indirectly generate an additional \$14.3 billion US dollars.
- Meetings generate 441,300 direct jobs and 342,400 indirect jobs, which adds up to 783,700 total jobs. Also, it generates 4.6 billion dollars in employment income (2.7 billion directly and 1.9 indirectly).

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# Table of Contents

<b>Section 1: Introduction.....</b>	<b>5</b>
Background & Objective.....	5
Study Guidelines.....	6
Research Overview.....	7
<b>Section 2: Conceptual Framework.....</b>	<b>8</b>
Meetings Defined.....	8
Scope of the Meetings Sector.....	9
Meetings Economic Activity.....	15
<b>Section 3: Research Methodology.....</b>	<b>18</b>
Primary Research.....	18
Secondary Research.....	23
Data Reconciliation.....	23
<b>Section 4: Meetings Volume.....</b>	<b>24</b>
Meetings Volume Estimates.....	24
Meeting Participants.....	26
Room Nights.....	27
<b>Section 5: Meetings Direct Spending.....</b>	<b>28</b>
Participant Spending.....	29
Planning and Production Spending.....	30
Other Direct Spending.....	32
Total Direct Spending.....	32
<b>Section 6: Total Economic Significance. ....</b>	<b>39</b>
General Indication of Total Significance.....	39
Direct Effects.....	40
Total Effects.....	41
Meetings Direct Contribution to GDP Comparison.....	42
<b>Appendix A: Glossary.....</b>	<b>43</b>
<b>Appendix B: Exchange Rates.....</b>	<b>48</b>
<b>Appendix C: Secondary Research Sources.....</b>	<b>49</b>
<b>Appendix D: Acknowledgments.....</b>	<b>51</b>

## Table of Figures

Table 1: What Constitutes a Meeting? .....	9
Table 2: Core Meeting Industries and Corresponding NAICS Codes .....	13
Table 3: TSA Industry Extension .....	14
Table 4: TSA Commodity Extension .....	15
Table 5: Meeting Industry Supply vs. Demand .....	16
Table 6: Survey Sample Sizes .....	19
Table 7: Key Elements of Survey Instruments.....	20
Table 8: Meeting Activity Economic & Non-Economic Data .....	21
Table 9: Survey Response Rate .....	22
Table 10: Meeting Volume and Participants By Type.....	25
Table 11: Meeting Volume by Venue .....	25
Table 12: Participant Volume by Meeting and Type.....	26
Table 13: Participant Volume by Meeting and Origin .....	27
Table 14: Room Nights Generated by Meetings .....	27
Table 15: Participant Spending by Type .....	29
Table 16: Participant Spending by Origin .....	30
Table 17: Meeting Production Spending .....	31
Table 18: Total Meetings Direct Spending.....	32
Table 19: Direct Spending by Meeting Type .....	33
Table 20: Per Capita Direct Spending.....	33
Table 21: Direct Spending by Commodity .....	35
Table 22: Total Direct Spending by Commodity Compared to TS Account.....	37
Table 23: Comparison of Mexico and U.S. Studies.....	38
Table 24: Mexico Meetings' Direct Economic Effects .....	41
Table 25: Mexico Meetings' Total Economic Effects .....	41
Table 26: GDP by Industry.....	42

# Section 1: Introduction

## 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*). Mostly recently, in the United States, the Convention Industry Council in conjunction with other leading meeting industry associations released the study entitled the *Economic Significance of Meetings to the U.S. Economy* (February 2011). However, research that specifically addresses the economic significance of meetings in Mexico has been limited. As a result, SECTUR initiated a plan to demonstrate the value of face-to-face meetings and study the economic significance of meetings in Mexico.

The Firm was engaged by SECTUR to lead the effort of estimating the economic significance of meetings in Mexico in for 2010. This study represents the first definitive, quantitative, and research-based analysis of the economic contribution of face-to-face meetings to the Mexican 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 sector 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, and 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. The definitions of meetings and meeting types are included in Appendix A.

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 tourism activity. Given the overlap of meetings 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 tourism industries as an extension of the Tourism Satellite Account of Mexico ("TSA" or "Mexico TSA"), and other relevant industries.

## Research Overview

Research was a critical step in the process for quantifying the economic significance of meetings. The study team conducted a 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 volume and spending. Nearly 400 surveys were received from meeting organizers (both "in-house" and "independent/third-party"), venue managers, and destination marketing organizations. Secondary data was used as a source for data related to the key participant groups of meeting delegates and exhibitors.

These research and analysis efforts were conducted in parallel to each other, whereby the study team analyzed the results of each effort and reconciled the data and analyses to develop the basis for the estimates of economic significance. The study team 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. Expenditure figures are provided in U.S. dollars, and where appropriate, Mexican Pesos were converted to U.S. dollars based on average annual exchange rates (provided in Appendix B).



## Section 2: Conceptual Framework

This section sets the framework used to quantify the "economic footprint" of meetings activity on the tourism economy and the overall Mexican economy. In establishing the conceptual framework for this study, UNWTO's guidance related to meetings definitions and methodologies for quantifying economic significance was used. This included the following sources:

- 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)
- UNWTO Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension (November 2006)

### Meetings Defined

Defining what constitutes a meeting was a key foundation of this study. Historically, the term "meeting" has been broad-based and often used to refer to a wide range of events of varying size and type. Recognizing that various organizations had adopted overlapping and potentially conflicting definitions of a meeting, the UNWTO, in cooperation with Reed Travel Exhibitions, ICCA, and MPI, recommended the adoption of a universal definition. Generally speaking, 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.

As illustrated in Table 1, based on further refinement by the UNWTO and for purposes of this study, the term "meeting" and its description above refer to a gathering of 10 or more participants for a minimum of 4 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 activities (wedding receptions, holiday parties, etc.), permanently established formal educational activities (primary, secondary or university level education), purely recreational activities (such as concerts and entertainment 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. Please also refer to Appendix A for a full definition of "meeting."

**Table 1:  
What Constitutes a Meeting?**

Meeting Length	Minimum of 4 hours
Meeting Size	Minimum of 10 participants
Meeting Venue	Contracted venue
Meeting Location	Mexico
Meeting Types	<p><i>Key Types:</i></p> <ul style="list-style-type: none"> <li>• Conventions/Conferences/Congresses</li> <li>• Trade Shows/Business Exhibitions</li> <li>• Incentive Events</li> <li>• Corporate/ Business Meetings</li> <li>• Other Meetings (which qualify under the defined criteria)</li> </ul>
Meeting Types <b><i>Excluded</i></b>	<ul style="list-style-type: none"> <li>• Consumer shows</li> <li>• Social activities</li> <li>• Formal education activities</li> <li>• Recreational and entertainment activities</li> <li>• Political campaign rallies</li> </ul>

### Scope of the Meeting Sector

To estimate the economic significance of meetings, it was necessary to define the scope of the meetings sector. The terms sector and industry are often used interchangeably. UNWTO, for example, uses the term "meetings industry" as it refers to the sector. However, for purposes of this study, the meetings sector represents a collection of industries that comprise the sector.

According to UNWTO's *Global Meeting Initiative, Volume 1: Basic Concepts and Definitions*, the scope of the meeting sector includes the establishments engaged, either as a primary or secondary economic activity, in:

- The organization, promotion, marketing, and selling of congresses, conferences, conventions, seminars, trade exhibitions and fairs, and incentive activities whether as packages or bundles of services or consisting of specific services, including the intermediation or the management of reservations for any particular meetings-related services;

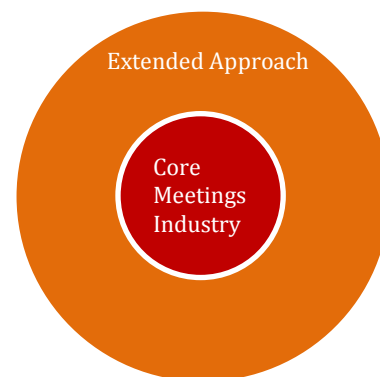
- The commercial provision of meeting facilities or accommodations for meeting participants or exhibitors; and
- Auxiliary services which are typical or necessary for the hosting or organization of meetings, such as personnel, technical equipment, catering, or other materials.

Furthermore, these activities may be conducted by a variety of establishments associated with meetings, including meeting organizers, hosting corporations, association or government entities, trade show exhibitors, meeting delegates, or other establishments.

### Core and Extended Approach

UNWTO also outlined components of the meetings sector to include "core" meetings industries and extend the sector to other supporting entities that include a broader array of businesses. These concepts allow for the design of a methodological framework for assessment of their economic significance.

The core meetings industries can be defined to include all business units in the reporting economy that specialize in the production of typically meetings-related services as their principal economic activity. The four core meeting industries and their related activities as characterized by UNWTO are outlined as follows:



Core Meeting Industries	Definition
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1 Specialized meetings organizers	Businesses engaged in the organization, promotion and/or management of events, such as business and trade shows, conventions, conferences and meetings, whether or not including the management and provision of the staff to operate the facilities in which such events take place.
2 Convention, congress, and exhibition centers	Businesses engaged in buying, selling, renting and operating self-owned or leased real estate, specifically non-residential buildings including exhibition halls.
3 Incentive houses and destination management companies	Agencies primarily engaged in selling travel, tour, transportation and accommodation services to the general public and commercial clients; or agencies engaged in tour operator activities, including arranging and assembling tours that may include items such as transportation, accommodation, food and recreational or sporting activities.

Core Meeting Industries	Definition
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4 Convention and Visitor Bureaus (destination marketing organizations)	Organizations that specialize in the provision of information, reservation services or in the promotion of meetings activity in a specific destination.
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An **extended approach** of the concept of the meetings sector includes all businesses in the reporting economy, other than those described above, that engage in the production of services that intervene directly or are connected to the participation in or organization of meetings, including services provided to meeting participants, exhibitors and meeting organizers/hosting entities. Such businesses provide auxiliary services, equipment, and personnel that are used in organizing or attending meetings include:

- Accommodations
- Transportation
- Technical equipment
- Secretarial support services
- Catering, food and restaurant services
- Speakers' representation services
- Stand construction
- Other auxiliary businesses

### Tourism

While some meetings are held in an attendee's local area, others are held outside his or her local area and require travel to the meeting destination. In such cases, the participant's trip to the meeting destination affects the national economic activity associated with meetings, as well as tourism activity. For purposes of this study, participants that travel to meetings are those that stay overnight away from home in paid accommodations or travel more than 75 kilometers from their primary residence to attend the meeting. This definition of travel generally aligns with definitions outlined by the UNWTO and the Mexico TSA as noted below.

- **UNWTO:** The UNWTO defines tourism as the activities of persons traveling 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.
- **Mexico TSA Definition of Tourism:** Tourism refers to the activities in which visitors are engaged. It encompasses all economic activities that are related to satisfying tourists' demands. Therefore, tourism cannot be defined independently of visitors and the activities in which they engage during their travel.

Tourism, seen as the activities of tourists, represents a consumer function that is related to the production of goods and services that satisfy the needs of the visitors.

- **Mexico TSA Definition of a Visitor:** The term is defined as any person that travels outside of his or her usual location for a period of less than 12 months for any reason, except those persons who will engage in activities that will generate income in the travel destination; refugees or migrant workers; diplomats; border or seasonal workers; travel employees; or persons seeking to establish new residence or employment. The term, thus, includes residents of the country who travel to other regions of the country or outside of the country, as well as persons who travel to Mexico from other countries.

Given the overlapping nature of meetings and tourism activity, the UNWTO suggested that the components of the meetings sector (or industry as defined by UNWTO) be identified through a complimentary set of tables to a nation's tourism satellite account.

### *Tourism Satellite Account*

National accounts provide a standard framework for measuring the economic activity of a nation. The Mexican government (in addition to the federal statistical agencies of the United States and Canada) uses the North American Industry Classification System (NAICS), which classifies business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the business economy. As the tourism sector is a combination of multiple industries such as transportation, accommodation, food and beverage services, recreation, travel agencies, etc., Mexico employs the use of a "satellite account" to measure the size of economic sectors that are not defined as industries in national accounts.

Similar to the tourism sector, the meetings sector involves a number of components (some of which are tourism-related) that are currently spread across the national industry accounts. These components include the four core industries previously identified (specialized meeting organizers; convention, congress, and exhibition centers; incentive houses and destination management companies; and convention and visitors bureaus), tourism industries, and other industries involved in meetings activity. The four core industries generally align with existing national accounts, as presented in Table 2.

**Table 2**  
**Core Meeting Industries and Corresponding NAICS Codes**

<b>Core Meeting Industries</b>	<b>NAICS Codes (National Account)</b>	
1 Specialized meetings organizers	561920:	Convention and Trade and Industrial Show Organizers
2 Convention, congress, and exhibition centers	531113:	Rental of Party Rooms and Convention Halls without Intermediation
3 Incentive houses and destination management companies	5615:	Travel Agencies and Reservation Services
4 Convention and visitor bureaus	5615	Travel Agencies and Reservation Services
	9313	Regulation and Promotion of Economic Development
	5619	Other Business Support Services

Of these identified core industries, NAICS codes for incentive houses and destination management companies and convention and visitors bureaus are recognized within the TSA. As such, specialized meeting organizers and convention, congress, and exhibition centers have been identified as core meetings industry groupings that are separate from accounts of the TSA. Table 3 illustrates the extension of the TSA related to meeting activity at an industry level

**Table 3:  
TSA Industry Extension**

<b>Tourism Industries</b>	Accommodation Food & Beverage Air Transportation Land Transportation Other Transportation <sup>1</sup> Retail (Goods) <sup>2</sup> Recreation & Entertainment Travel Services & Other Tourism Commodities
<b>Meetings Industries</b>	Meeting Organizers Meeting Venues
<b>Other Industries<sup>3</sup></b>	Other Industries

<sup>1</sup>For purposes of this study, "Other Transportation" includes "Tourist Transportation" as categorized in the Mexico TSA.

<sup>2</sup>Retail includes goods such as clothes, books/periodicals, crafts/gifts, personal care items, etc.

<sup>3</sup>Other Industries include construction, goods rental, other support services, transportation, facilities support services, other computer-related services, and others.

While NAICS codes classify industries, commodities (goods & services) within these industries are classified through the North American Product Classification System (NAPCS). The primary commodities identified in NAPCS that are associated with the four core meetings industries include the following:

- Convention and trade show organization, planning & assistance services
- Rental of space for meetings, conventions, and similar short-term business uses
- Travel arrangement and reservation services
- Tour operator services

For purposes of this study, commodities related to convention and trade show organizing, planning, and assistance services have been grouped into the category of meeting planning and production, while rental of space for meetings, conventions, and similar short-term uses is referred to as venue rental. It should also be noted, that at the commodity level, meeting planning and production reflects spending associated with meetings planned by independent/third-party organizers and in-house organizers, while at the industry level, meeting organizers are associated with spending only for independent/third-party meeting organizing services. Table 4 illustrates the extension of the TSA related to meeting activity at the commodity level.

**Table 4:  
TSA Commodity Extension**

<b>Tourism Commodities</b>	Accommodation
	Food & Beverage
	Air Transportation
	Land Transportation
	Other Transportation <sup>1</sup>
	Retail (Goods) <sup>2</sup>
	Recreation & Entertainment
	Travel Services & Other Tourism Commodities
<b>Meetings Commodities</b>	Meeting Planning & Production
	Venue Rental
<b>Other Meetings-related Commodities<sup>3</sup></b>	Other Commodities

<sup>1</sup>For purposes of this study, "Other Transportation" includes "Tourist Transportation" as categorized in the Mexico TSA.

<sup>2</sup>Retail includes goods such as clothes, books/periodicals, crafts/gifts, personal care items, etc.

<sup>3</sup>Other Industries include construction, goods rental, other support services, transportation, facilities support services, other computer-related services, and others.

### Meetings Economic Activity

With a framework for the scope of the meetings sector, measuring the economic significance was addressed from the supply-side and demand-side dimensions. According to the UNWTO, the supply-side and demand-side are two types of measures relating to the economic contribution of meetings activities for which information is required. A supply-side only approach would omit expenditure by participants on products purchased from other related industries while participating in meetings, while a demand-side approach based only on participants spending would omit the contribution of the meetings industry to the economy.

In Table 5, characteristics of the supply-side and demand-side dimensions are outlined in terms of definitions, involvement in meetings, and sector roles.



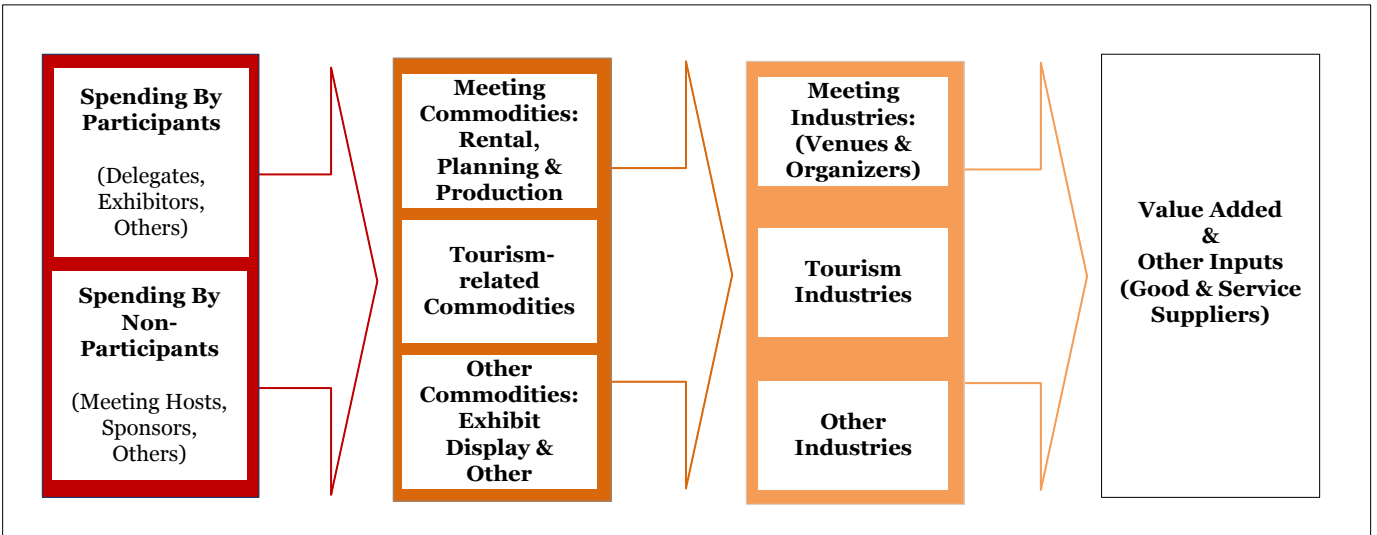
**Table 5:  
Meeting Industry Supply vs. Demand**

	<b>Supply-side</b>	<b>Demand-side</b>
<b>Definition</b>	<p>Organizations/businesses that provide meetings services.</p> <p>Measures include such variables as income (represented by fees and commissions), expenditures, and employment.</p>	<p>Participants in meetings, including meeting delegates, businesses/individuals who exhibit, and other attendees to meetings such as speakers/trainers, media, guests, and other attendees.</p> <p>Measures include such variables as expenditures by participants at meetings on specific identified services supplied by the meetings, tourism, or other industries.</p> <p>Non-economic variables related to the expenditure data include: numbers of participants, lengths of meetings, number of nights in hotels or other accommodation, and other variables.</p>
<b>Involvement</b>	Non-participants	Participants
<b>Types</b>	<p>Venues</p> <p>Destination Marketing Organizations (DMOs)</p> <p>Meeting Organizers/Hosts</p> <p>Other Sponsors/Contributors to Meetings</p>	<p>Delegates</p> <p>Exhibitors</p> <p>Other Meeting Attendees (Speaker/Trainers, Media, and Other Attendees)</p>

As noted in the previous table, from a supply-side perspective, venues, destination marketing organizations, meeting organizers/hosts, and other contributors are characterized as "non-participants." Although non-participants are actively involved in meetings, they are not the primary audience for the meeting itself.

Information was collected as part of the research process (described in the following section) through primary surveys and secondary data regarding meetings volume and spending of participants (demand-side) and non-participants (supply-side), which allowed for the quantification of the economic significance of meetings. The following graphic illustrates how participant and non-participant spending on meetings, tourism and other meetings-related commodities affects the defined meetings, tourism, and other industries, and which in turn, contributes to value added and additional spending by other industry suppliers.

### Spending Flow



\*Note: Results adjusted to ensure that spending by goods and services suppliers on meetings activities are not counted twice.

## Section 3: Research Methodology

The study team conducted a 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). These research and analysis efforts were conducted in parallel to each other, whereby the study team analyzed the results of the each effort and reconciled the data and analyses to develop the basis for the estimates of economic significance presented in this Report.

### Primary Research

Surveys were distributed to audiences representing: 1) meeting organizers, including both "in-house" and "independent/third-party organizers; 2) venue managers; and 3) destination marketing organizations. For purposes of this study, surveys were conducted of supply-side organizations. Secondary data was used as a source for data related to the key participant groups of delegates and exhibitors. Demand-side information was collected from secondary sources described in this section.

	Survey Audience	Description
1	Meeting organizers	Meeting organizers included both "in-house" meeting organizers and "independent/third-party" meeting organizers: <ul style="list-style-type: none"> <li>a) In-house organizers are responsible for organizing the meeting for their own organization which is hosting or sponsoring the meeting</li> <li>b) Independent/Third-party organizers are contracted to organize the meeting on behalf of the meeting host or sponsor organization</li> </ul>
2	Venue managers	Managers of the following types of venues: <ul style="list-style-type: none"> <li>a) purpose-built meeting facilities (without lodging) such as conference centers and convention centers;</li> <li>b) meeting facilities with lodging (hotels, motels, resorts, etc.)</li> </ul>
3	Destination marketing organizations	Typically, 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 offices of conventions and visitors (OCVs).

While all the surveys provided important inputs to the analysis, the survey of meeting venues served as one of the primary sources of information for volume data. The meeting organizer survey and secondary data were primary sources for spending data within the meetings sector from a supply-side and demand-side perspective. It should be noted that while certain attendees to meetings such as speaker/trainers and certain suppliers (vendors) to the industry such as production companies, caterers, exhibitor service companies were not specifically surveyed as part of the primary research process, spending information related to these other interested parties was captured through the survey of the identified audiences.

### *Survey Distribution*

Meeting organizers were distributed surveys by email on an Internet-based platform. Surveys of venue managers and DMOs were distributed by email. Responses were primarily collected during April and May of 2011. Survey participants were emailed survey links or survey documents in both Spanish and English, and respondents were provided the option to respond in their preferred language.

### *Survey Sample Development*

Listings of survey contacts for each survey audience were provided by SECTUR. Contacts from these lists comprised the primary survey sample. These contact lists were supplemented with additional sources of contacts provided by Meeting Professionals International (MPI) and the Professional Convention Management Association (PCMA), which were considered to be a supplemental survey sample. These international associations provided member contact information for planners based in Mexico (Mexican chapter members) as well planners involved in U.S. meetings, which included planners based in the U.S, Canada, and other international locations.

For the primary and supplemental surveys samples, over 11,300 email contacts were compiled; however, the supplemental sample included some duplicate contact names provided by SECTUR, MPI, and PCMA. The study team worked to mitigate the risk of duplication through a process involving sorting and re-sorting the database of email addresses and names to search for and eliminate duplicates. This process was important to ensure that individual participants were not surveyed more than once. The overall process yielded approximately 10,900 unique contacts, with the sample sizes by type presented in Table 6.

**Table 6:  
Survey Sample Sizes**

	<b>Meeting Organizers</b>	<b>Venues</b>	<b>DMOs</b>
Primary Sample	88	314	58
Supplemental Sample	10,445	--	--

**Questionnaire Sections by Survey Audience**

A unique survey was developed for each audience with questions specific to meetings volume and related expenditures. The surveys distributed to meeting organizers and venue managers included a section addressing overall annual meeting activity during 2010. Meeting organizers were also asked to report on a sample of a specific meeting. DMOs were questioned regarding their involvement in the meetings sector in terms of their annual budget and funding. Table 7 summarizes the key elements included in each audience’s survey.

**Table 7:  
Key Elements of Survey Instruments**

<b>Survey Audience</b>	<b>Annual Meetings Activity</b>	<b>Specific Individual Meetings</b>	<b>Number of Specific Mtgs. Questioned</b>
1 Meeting Organizers	Yes	Yes	One
2 Venue Managers	Yes	No	-
3 Destination Marketing Organizations	Not applicable	Not applicable	-

**Data Collected through Surveys**

Each survey audience was asked to provide both economic data (revenues, expenditures, etc.) and non-economic data (meeting volume, attendance, etc.). Surveys of collected data elements included, but were not limited to information provided in Table 8.

**Table 8:  
Meeting Activity Economic & Non-Economic Data**

<b>Economic</b>	<b>Non-Economic</b>
Meeting attendance costs (registration and fees)	Types of meetings
Meeting organization expenditures (including venue rental, food & beverage, vendor services, speaker fees, and other costs)	Number of meetings
Delegate travel expenditures	Meeting activity growth
Meeting revenues	Meeting duration
Venue operating revenue & expenditures	Attendance by attendee type
Venue capital expenditures	Attendee origin
DMO spending/contributions for meetings	Room nights

### *Surveys Received*

The primary research was based on nearly 400 surveys collected through the meeting organizer, venue, and DMO audiences, as detailed in Table 9. The response rates were based on respondents that completed the number of questions considered to result in usable data for analysis. Response rates were strong among the primary sample with 21 percent of venues, 43 percent of DMOs, and 35 percent of meeting planners of the primary sample providing survey responses. While the response rate for the supplemental sample of meeting planners appears low in comparison to the primary sample, the response rate is rather high given the largely U.S.-based nature of meeting planners comprising this sample. In other words, the sample included U.S. meeting planners without being able to differentiate those that plan meetings outside the U.S.

**Table 9:  
Survey Response Rate**

Survey Audience		Sample Size	Surveys Received	Response Rate
1	Venues	314	66	21%
2	Destination Marketing Organizations	58	25	43%
3	Meeting Organizers: Primary	88	31	35%
	Supplemental	10,445	266	3%
<b>Total</b>			<b>388</b>	

### *Survey Analysis & Adjustments*

Survey responses were analyzed to ensure data quality. This process involved several steps, including the following:

- For each survey, a point of completion for usable data was determined. In other words, responses that did not meet a minimum questions-answered threshold were not considered to contain usable data for the analysis.
- Survey data was analyzed to ensure that responses met the definition of meetings. Responses were removed from the data set that did not fit the classification of a meeting, were held on-site, or were too small (not meeting minimum UNWTO-threshold attendance) meetings.
- Responses were also analyzed to ensure no other "bad data" was included. The study team removed responses that, based on experience and judgment, appeared to be invalid, inconsistent, unreasonable, or reported in error.
- Outliers were removed from the dataset, as appropriate. Averages and standard deviations were calculated, and values that fell outside of three standard deviations from the average were removed from the data set for that question and other subsequent questions that the outlier value may have impacted.

## Secondary Research

Secondary data played an equally important role as the primary surveys in the research and analysis process. Similar economic and non-economic information regarding meetings volume and expenditures from a supply and demand perspective was collected and analyzed. Government, industry, and the Firm's proprietary sources were used in this process. Examples of these secondary sources included, but were not limited the following:

- **Government:** SECTUR, Cuenta Satellite del Turismo de México 2005-2009 (TSA), Instituto Nacional de Estadística y Geografía (INEGI), Centro de Estudios Superiores de Turismo (CESTUR), Sistema Integral de Información de Mercado Turísticos (SIIMT), and others
- **Industry:** Asociación Nacional de Oficinas de Convenciones y Organismos Similares A.C. (ANDOC), Oficina de Congresos y Convenciones de la Ciudad de México, International Convention and Congress Association (ICCA), Society of Incentive & Travel Executives (SITE), World Travel & Tourism Council (WTTC), Cvent, MCG's *Meetings Tourism Study*, DK Shifflet & Associates' Mexico meetings data, the Center for Exhibition Industry Research's *Exhibition Industry Census*, Smith Travel Research, Trade Show Week, Business Travel News' Corporate Travel Index, and others
- **Proprietary:** Information contained within the *Convention Center Report*, previous studies of the Firm involving the meetings sector including the *Economic Significance of Meetings to the U.S. Economy*, and other such sources.

Please refer to Appendix C for a full list of secondary research sources.

Secondary data was also used for the development of populations for meeting venues as well as organizers, allowing for data extrapolation. In addition, secondary data was used in the reconciliation process with the survey results and in benchmarking overall estimates.

## Data Reconciliation

With the amount of primary and secondary data collected, the reconciliation process was a critical step in the analysis. The study team 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.



## Section 4. Meetings Volume

To estimate the economic contribution of meetings, it was important to conduct a volumetric analysis of the meetings sector and establish a baseline for its size in terms of the volume of meetings and total meeting participants. The dual research process of primary and secondary data allowed for the development of population parameters for meeting venues in Mexico and the extrapolation of volume-related data to the venue populations. To supplement this analysis, indications of meeting planner populations were also developed and volume-related data was similarly extrapolated to the estimated meeting planner populations.

Venue populations were estimated using survey contact lists as well as industry and proprietary sources. These sources included SIIMT, INEGI, Cvent, M&C's *Meetings Facilities Search*, Mexico TSA, Tradeshow Week's *Major Exhibit Hall Directory*, Smith Travel Research, the Firm's proprietary databases, and other sources used to develop population estimates.

The venue populations were segmented by venue type (purpose-built facilities, meeting facilities with lodging, etc.) Volume indicators such as the number of events, attendance (by meeting type and origin), and room nights were applied to the venue populations, and the data was weighted, as appropriate, by the type and size of venue.

### Meetings Volume Estimates

Based on the described volume analysis, an estimated 197,400 meetings were held in the Mexico in 2010. As illustrated in Table 10, 131,000 meetings were classified as corporate/business meetings, which represented the majority of total meetings (66 percent). Conventions/conferences/congresses totaled to 28,000, or 14 percent of total meetings in 2010. These meetings primarily represented association and other non-corporate meetings. Other meetings totaled 27,700 which represented any other events that met the definition of a meeting, but are not elsewhere classified. Other meetings likely also include events that survey respondents did not feel comfortable classifying under a single type of the event definitions provided, due to their overlapping nature (e.g. corporate meeting or convention that included an exhibition component). Moreover, based on the spending and origin characteristics of other events, which will be described later in this Report, it appears that this category, relative to others, likely comprises events with higher percentage of local attendees, shorter durations (i.e. less than one day) and limited overnight stays. For a full listing of meeting definitions, please see Appendix A.

**Table 10:  
Meeting Volume and Participants By Type**

<b>Meeting Type</b>	<b>Meetings</b>	<b>Participants</b>	<b>Percent of meetings</b>
Corporate/Business Meetings	131,000	10,210,000	66%
Conventions/Conferences/Congresses	28,000	5,360,000	14%
Incentive Meetings	6,300	5,070,000	3%
Trade Shows	4,400	560,000	2%
Other Meetings	27,700	1,860,000	14%
<b>Total</b>	<b>197,400</b>	<b>23,060,000</b>	<b>100%</b>

\*Note: Totals may not add due to rounding.

Another useful segmentation of total meetings is by venue type. Table 11 presents a breakdown of the 197,400 meetings by the type of venue where the meeting was held in 2010. Venue types included purpose-built meeting facilities (convention centers, conference centers without sleeping rooms, etc.), meeting facilities with lodging (hotels, resorts, conference centers with sleeping rooms, etc.), and other venues (university classrooms, theaters, stadiums, arenas, museums, etc.). As illustrated, most meetings (81 percent) took place at hotels and other facilities with lodging.

**Table 11:  
Meeting Volume by Venue**

<b>Venue Type</b>	<b>Meetings</b>	<b>Percent</b>
Meeting Facility with Lodging	159,900	81%
Purpose-Built	25,700	13%
Other	11,800	6%
<b>Total</b>	<b>197,400</b>	<b>100%</b>

\*Note: Totals may not add due to rounding.

## Meeting Participants

As illustrated in Table 12, 2010 saw an estimated 23.1 million participants attending meetings in Mexico. Corporate/business meetings generated the largest share of participants (44 percent), followed by trade show/business exhibitions (23 percent) and conventions/conferences/congresses (22 percent). With regard to the type of participant (delegates, exhibitors, other), meeting delegates comprised the largest share with an estimated 19.5 million or 85 percent of total participants. Exhibitors totaled approximately 2.2 million or nine percent of all participants. Other attendees (six percent) to meetings included speakers/trainers, media, guests, and other attendees.

**Table 12:**  
**Participant Volume by Meeting and Type**

Meeting Type	Participant Type			Total	Percent
	Delegates	Exhibitors	Other		
Corporate/Business Meetings	9,190,000	510,000	510,000	10,210,000	44%
Trade Shows/Business Exhibitions	3,750,000	1,070,000	540,000	5,360,000	23%
Conventions/Conferences/Congresses	4,310,000	510,000	250,000	5,070,000	22%
Incentive Meetings	500,000	0	50,000	560,000	2%
Other Meetings	1,770,000	60,000	40,000	1,860,000	8%
<b>Total</b>	<b>19,520,000</b>	<b>2,150,000</b>	<b>1,390,000</b>	<b>23,060,000</b>	<b>100%</b>
<b>Percent</b>	85%	9%	6%	100%	

\*Note: Totals may not add due to rounding.

In addition to participant type, meeting attendance was also analyzed by origin type and presented in Table 13. For purposes of this study, participant origins were defined as follows:

- **Local:** Attendees who traveled less than 75 kilometers to attend a meeting and did not stay overnight in paid accommodations.
- **Domestic:** Attendees who traveled more than 75 kilometers to attend a meeting or who stayed overnight in paid accommodations.
- **International:** Attendees who traveled from outside of Mexico to attend the meeting.

Local participants accounted for 49 percent of attendees, while domestic and foreign participants comprised 47 percent and four percent, respectively, of total attendees. Participants that traveled for meetings accounted for the majority of meeting participants (51 percent). Among travel attendees, foreign participants accounted for seven percent.

**Table 13:  
Participant Volume by Meeting and Origin**

<b>Meeting Type</b>	<b>Origin Type</b>			<b>Total</b>	<b>Percent</b>
	<b>Local</b>	<b>Domestic</b>	<b>Foreign</b>		
Corporate/Business Meetings	5,410,000	4,600,000	200,000	10,210,000	44%
Trade Shows/Business Exhibitions	2,360,000	2,920,000	80,000	5,360,000	23%
Conventions/Conferences/Congresses	2,030,000	2,870,000	170,000	5,070,000	22%
Incentive Events	20,000	170,000	370,000	560,000	2%
Other Meetings	1,490,000	360,000	10,000	1,860,000	8%
<b>Total</b>	<b>11,310,000</b>	<b>10,920,000</b>	<b>830,000</b>	<b>23,060,000</b>	<b>100%</b>
<b>Percent</b>	49%	47%	4%	100%	

\*Note: Totals may not add due to rounding.

### Room Nights

Room nights are another important measure of meetings activity volume. As shown in Table 14, meetings activity generated an estimated 24.3 million room nights in 2010. Participants to corporate/business meetings and conventions/conferences/congresses were the primary drivers of this activity, accounting for 46 and 26 percent, respectively.

**Table 14:  
Room Nights Generated by Meetings**

<b>Meeting Type</b>	<b>Total Room Nights</b>	<b>Percent</b>
Corporate/Business Meetings	11,040,000	46%
Conventions/Conferences/Congresses	6,390,000	26%
Trade Shows/Business Exhibitions	4,800,000	20%
Incentive Meetings	1,350,000	6%
Other Meetings	670,000	3%
<b>Total</b>	<b>24,250,000</b>	<b>100%</b>

\*Note: Totals may not add due to rounding.

## Section 5: Meetings Direct Spending

Direct spending serves as a primary indicator of the economic significance of meetings. Direct spending is defined as *spending within the Mexico economy from purchases of goods and services, employment of residents, and wages paid to employees resulting from the activity.*

To estimate the direct expenditures related to meetings activity, the survey results and secondary data were used to develop spending characteristics for participants (including delegates and exhibitors) and non-participants (meeting organizers, venues, DMOs, and other contributors). The estimates of meetings and attendance volume were applied to expenditure characteristics associated with participant and non-participant spending on meetings to estimate direct spending.

In developing total spending estimates, it was important to ensure that there was no "double counting," and total spending was adjusted to reflect a "net" amount of spending injected into the economy. For example, registration fees of participants serve as a funding source for the costs of organizing meetings. As such, direct spending by meeting organizers reflected the additional costs to hold the meeting that were not funded through participant or other non-participant sources.

In addition, spending by other industry groups involved in the meetings sector, including vendors such as exhibit service companies, caterers, equipment rental companies, etc. were considered secondary and are thus not included in the direct spending analysis. This type of secondary spending is typically captured through indirect and induced contributions to the industry.

Industry sources also played an important role in benchmarking direct spending, particularly as it related to tourism. For example, the Mexico TSA provided key benchmarks for tourism spending on a total basis and by key expenditure categories.

## Participant Spending

Meeting participants incurred expenses associated with attending meetings such as registration, travel, and exhibiting costs. As presented in Tables 15 and 16, \$10.5 billion was spent directly by delegates, exhibitors, and other meeting participants in 2010. Top expenditure categories included registration fees and other (42 percent), accommodations (18 percent), and food and beverage (15 percent).

**Table 15:  
Participant Spending by Type (in thousands USD)**

Expenditure Category	Participant Type			Total	Percent
	Delegates	Exhibitors	Other		
Registration Fees & Other Expenses	\$1,204,600	\$3,091,800	\$121,200	\$4,417,600	42%
Accommodation	1,555,800	182,700	185,900	1,924,400	18%
Food and Beverage	1,303,600	149,900	156,500	1,610,000	15%
Air Transportation	731,400	85,000	86,500	902,900	9%
Land Transportation	673,100	78,400	82,500	834,000	8%
Other Transportation	151,600	18,700	22,100	192,400	2%
Retail (Goods)	233,500	27,400	27,800	288,700	3%
Recreation & Entertainment	93,100	10,500	12,500	116,100	1%
Travel Services & Other	186,200	19,100	19,200	224,500	2%
<b>Total</b>	<b>\$6,132,900</b>	<b>\$3,663,500</b>	<b>\$714,200</b>	<b>\$10,510,600</b>	<b>100%</b>

\*Note: Totals may not add due to rounding.

Registration fees and other expenses include fees for registration, optional ancillary events, floor space, sponsorships, and other related expenses. For many meeting types, such as conventions and trade shows, it is these participant expenditures that help to cover the costs of meeting planning and production. Exhibitors incurred additional expenses associated with displaying their goods/service offerings at the meeting. These expenses, which may include exhibit booth display, exhibitor services, booth shipping/transportation, and other expenses, are also included under this registration fees and other category. This expenditure category also includes spending associated with locally-based attendees.

Participant spending associated with travel includes spending of the travel party, which would include any accompanying guests and spending associated with any pre- or post-meeting activity. It is important to note that participant spending includes only amounts paid directly by the participants. It does not include spending by the meeting organizer or host organization on behalf of participants. For example, participant lodging costs paid directly by the host company for a corporate meeting under a master account are not included in these figures.

Participant spending is also presented by origin in Table 16. The table illustrates that the largest share of spending (approximately 70 percent) is generated by domestic meeting participants.

**Table 16:  
Participant Spending by Origin (in thousands USD)**

Expenditure Category	Origin Type			Total	Percent
	Local	Domestic	Foreign		
Registration Fees & Other Expenses	\$2,292,600	\$2,049,300	\$75,700	\$4,417,600	42%
Accommodation	Included above	1,635,800	288,700	1,924,500	18%
Food and Beverage	Included above	1,368,500	241,500	1,610,000	15%
Air Transportation	Included above	767,600	135,500	902,900	9%
Land Transportation	Included above	789,900	44,100	834,000	8%
Other Transportation	Included above	176,300	16,100	192,400	2%
Retail (Goods)	Included above	256,200	32,400	288,700	3%
Recreation & Entertainment	Included above	58,700	57,400	116,100	1%
Travel Services & Other	Included above	209,200	15,300	224,500	2%
<b>Total</b>	<b>\$2,292,600</b>	<b>\$7,311,500</b>	<b>\$906,700</b>	<b>\$10,510,600</b>	<b>100%</b>

\*Note: Totals may not add due to rounding.

### Planning and Production Spending

The production of meetings includes costs incurred by meeting organizers/hosts, venues, DMOs, and other contributors/sponsors. The meeting organizer/host incurs costs associated with planning and producing the meeting. Some of these costs may be funded by participants through registration fees, while others are funded by sponsorships, contributions by non-participants, and through "out-of-pocket" spending by the organizer/host. The net spending associated with organizing the meetings in Mexico 2010 is estimated at approximately \$5.1 billion. This figure is "net" in that it excludes meeting production costs that were covered in part through participant fees and contributions included in Tables 19 and 20.

In Table 17, the spending associated with producing meetings is detailed by expenditure category. As illustrated, the largest single expenditure category was food and beverage, accounting for 24 percent of total meeting organizing expenditures.

**Table 17:  
Meeting Production Spending (in thousands USD)**

<b>Expenditure Category</b>	<b>Amount</b>	<b>Percent</b>
Food and Beverage	\$1,623,900	24%
Meeting Venue Rental	1,233,300	18%
Entertainment/Production Services	363,100	5%
Audio-visual/Staging Services	322,000	5%
Meeting Organization Fees	274,100	4%
Advertising and Promotions	233,000	3%
Administration	205,600	3%
Group Transportation	198,700	3%
Décor	185,000	3%
Organization Staff	150,700	2%
Speakers/Trainers & Other Sponsored Attendees	143,900	2%
Meeting Labor	116,500	2%
Equipment Rental	102,800	2%
Shipping	95,900	1%
Tour Operator Services	82,200	1%
Printing	61,700	1%
Registration	48,000	1%
Technology Services	41,100	1%
Reservation Services	34,300	1%
Signage	20,600	<0.5%
Corporate Social Responsibility	13,700	<0.5%
Insurance	6,900	<0.5%
Other	1,295,000	19%
Subtotal	\$6,852,000	100%
Less: Costs Funded by Participant Fees & Contributions	(\$1,776,300)	
<b>Net Production Expenditures</b>	<b>\$5,075,700</b>	

\*Note: Totals may not add due to rounding.



### Other Direct Spending

Other spending on meetings activity not accounted for in participant spending (Tables 15 and 16) or meeting production spending (Table 17) included travel spending incurred by meeting organizers/hosts which were paid on behalf of delegates to attend the meeting, expenditures by venues associated with capital investment in meeting facilities (construction of new venues, expansions, major maintenance, etc.), and by DMOs in support of meetings activity. To avoid double counting, DMO spending included only additional support for the meetings sector that was not otherwise funded through the visitor industry. In total, this other spending was approximately \$2.5 billion.

### Total Direct Spending

As described in the preceding sections and illustrated in Table 18, the total participant and non-participant direct spending associated with Mexico meetings activity in 2010 was estimated at \$18.1 billion.

**Table 18:**  
**Total Meetings Direct Spending (in thousands USD)**

<b>Expenditure Category</b>	<b>Amount</b>	<b>Percent</b>
Participant Expenditures	\$10,510,600	58%
Net Production Expenditures	5,075,700	28%
Other Direct Spending	2,524,200	14%
<b>Total</b>	<b>\$18,110,500</b>	<b>100%</b>

\*Note: Totals may not add due to rounding.

The following sections present this spending by meeting type, by participant, and by commodity.

### *Direct Spending by Meeting Type*

Table 19 segments the \$18.1 billion in total direct spending by meeting type. As illustrated, direct spending associated with corporate/business meetings comprised the largest share of direct spending, accounting for 44 percent of the total.

**Table 19:  
Direct Spending by Meeting Type (in thousands USD)**

<b>Meeting Type</b>	<b>Total</b>	<b>Percent</b>
Corporate/Business Meetings	\$8,031,000	44%
Trade Shows/Business Exhibitions	4,656,000	26%
Conventions/Conferences/Congresses	3,916,000	22%
Incentive Events	573,500	3%
Other Meetings	934,000	5%
<b>Total</b>	<b>\$18,110,500</b>	<b>100%</b>

\*Note: Totals may not add due to rounding.

### *Direct Spending Per Participant*

In the Table 20, direct spending is presented as a metric measuring spending on a per capita basis. Total direct spending for each type of meeting was divided by the number of participants for each meeting type. This total direct spending includes purchases by meeting participants associated with attending the meeting such as travel, exhibiting materials, and other costs as well as non-participant spending associated with meeting planning and production, venue rental, and other contributions. Together, this total direct spending by participants and non-participants on a per person basis represents the total dollars spent associated with one meeting participant. In other words, the estimated \$785 per capita for all meetings participants is derived by dividing the total direct spending from Table 22 (\$18.1 billion) by the total number of meeting participants from Table 16 (23.1 million).

**Table 20:  
Per Capita Direct Spending (in USD)**

<b>Meeting Type</b>	<b>Total</b>
Incentive Events	\$1,024
Trade Shows/Business Exhibitions	\$869
Corporate/Business Meetings	\$787
Conventions/Conferences/Congresses	\$772
Other Meetings	\$502
<b>Average All Meetings</b>	<b>\$785</b>

In addition to the fact that this metric represents all participants (local, domestic, and international), it should be further noted that this figure is *not* location-specific other than to say it is a national per capita amount. In other words, participants and non-participants spend dollars before the meeting takes place (in multiple locations) on registration fees, planning/production good and services, exhibiting materials, etc.,

travel-related costs at the participant's place of origin and while in-transit to the meeting location, and at the meeting location itself. As such, the total direct spending per participant is reflective of national level spending from a supply and demand perspective, and it is not specific to spending that may have occurred in a meeting destination. Therefore, these per capita estimates should not be used to estimate the economic impact of a meeting on the local level.

### *Direct Spending by Commodity*

Direct spending estimates are also shown on a commodity basis to generally align with commodity groupings of the TSA and meetings-related accounts similar to those of NAPCS. As appropriate, some commodity categories were consolidated. For example, "Tourist Transportation" was consolidated with the category of "Other Transportation".

- **Meetings commodities:** Represent spending by meeting participants and non-participants related to the costs of organizing/holding meetings. Commodities identified in national accounts as convention and trade show organizing, planning, and assistance services have been grouped into the category of meeting planning and production, while rental of space for meetings, conventions, and similar short-term uses is referred to as venue rental.
- **Tourism commodities:** Represent spending by participants (delegates, exhibitors, and other) as well as spending by non-participants (which primarily consisted of meeting organizer/host spending on travel for delegates and staff and spending of other contributors such as DMOs) on tourism commodities. Travel expenditures are frequently paid for by the meeting organizer/host in the case of corporate meetings and incentive events.
- **Other meetings-related commodities:** These primarily consist of participant spending by exhibiting companies and local attendees and non-participant spending by other contributors (not elsewhere classified). Exhibiting company spending includes spending on the exhibit booth display, materials, hired services, transport, etc. Other participant spending on other commodities includes local attendee spending on items such as food and beverage and transportation costs and venue spending on capital improvement expenditures related to meeting venues.

As illustrated, \$8.7 billion, or 48 % of the direct expenditure relating to the activity of meetings, it is up to tourism, such as accommodation, food and beverage concepts, transportation, among others. This amount is already considered in Mexico's TSA. However, most of the direct spending is not related to the trip, which includes the costs for planning and production, facilities rental and other non-tourist concepts, amounting to \$9.4 billion, or 52 % and that fall outside of the TSA. This suggests that the scope of the meetings sector affects the Mexican economy in a more comprehensive manner.

**Table 21:**  
**Direct Spending by Commodity (in thousands USD)**

<b>Commodities</b>	<b>Direct Spending</b>	<b>Percent</b>
<u>Tourism Commodities</u>		
Accommodation	\$2,629,700	15%
Food and Beverage	2,300,000	13%
Air Transportation	1,289,900	7%
Land Transportation	1,148,700	6%
Other Transportation	286,600	2%
Retail (Goods)	423,700	2%
Recreation & Entertainment	165,900	1%
Travel Services & Other	502,000	3%
<b>Subtotal</b>	<b>\$8,746,500</b>	<b>48%</b>
<u>Meetings Commodities</u>		
Meeting Planning & Production	\$5,351,200	30%
Venue Rental	1,243,900	7%
Other Meetings-related Commodities	2,768,900	15%
<b>Subtotal</b>	<b>\$9,364,000</b>	<b>52%</b>
<b>Total</b>	<b>\$18,110,500</b>	<b>100%</b>

\*Note: Totals may not add due to rounding.

In other words, meetings sector can be described as consisting of two portions: one that it overlaps (or an extension) of the tourism sector and the remaining portion that corresponds to other sectors. Direct expenditure for meetings for 2010 compared to the tourist result (production) in 2009. Considering that 2009 is the most recent year for which there are data from the Mexico TSA, comparison with direct expenditure on meetings 2010 is only for the general purpose of illustrating the participation of meetings in the tourism sector. From the \$100.7 billion tourism production, \$8.7 billion, or 9 %, are the result of the meetings sector (using the results of 2009 as a simile for 2010).

**Meetings Participation in Tourism= \$8.7 Billion USD**

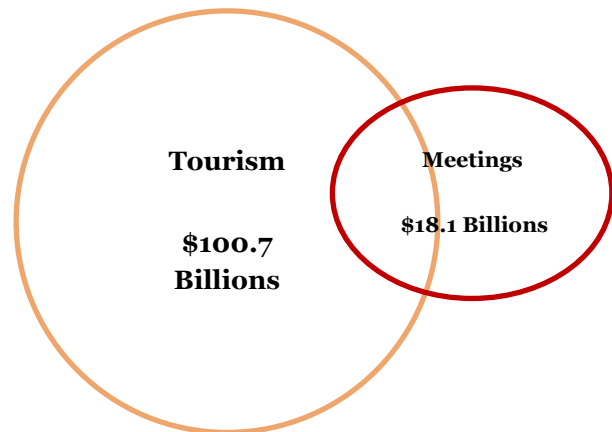


Table 22 presents direct spending by participants and non-participants for meetings by commodity compared to the Mexico TSA. As an extension of the Mexico TSA, the meetings sector can be compared to the tourism sector. Direct meetings spending for 2010 is compared to tourism output (production) in 2009. Since 2009 is the most recent year where Mexico TSA data is available, the comparison to 2010 meetings direct spending is for illustrative purposes only to provide a general indication of the meetings sector in relation to tourism.

While the size of the meetings sector was estimated at \$18.1 billion in terms of direct spending, not all of this spending was a subset of the tourism economy. As illustrated, \$9.4 billion was related to meetings and other commodities, while \$8.7 billion was associated with tourism activity related to meetings. Using 2009 as a proxy for 2010, the \$8.7 billion in meetings direct spending approximately accounted for 9 percent of the \$100.7 billion in direct output of the tourism sector.

**Table 22:  
Total Direct Spending by Commodity Compared to Tourism Satellite Account (in thousands  
USD)**

<b>Commodities</b>	<b>Participants</b>	<b>Non-Participants</b>	<b>Total Direct Spending</b>	<b>TSA Tourism Output</b>	<b>Meetings Share of Tourism Output</b>
<u>Tourism Commodities</u>					
Accommodation	\$1,924,400	\$705,300	\$2,629,700	\$12,794,035	21%
Food and Beverage	1,610,000	690,000	2,300,000	9,436,710	24%
Air Transportation	902,900	387,000	1,289,900	5,568,004	23%
Land Transportation	834,000	314,700	1,148,700	21,420,529	5%
Other Transportation	192,400	94,200	286,600	2,213,408	13%
Retail (Goods)	288,700	135,000	423,700	13,230,028	3%
Recreation & Entertainment	116,100	49,800	165,900	1,532,327	11%
Travel Services & Other	224,500	277,500	502,000	34,541,687	1%
<b>Subtotal</b>	<b>\$6,093,000</b>	<b>\$2,653,500</b>	<b>\$8,746,500</b>	<b>\$100,736,729</b>	<b>9%</b>
<u>Meetings Commodities</u>					
Meeting Planning & Production	\$1,776,300	\$3,574,900	\$5,351,200	Not applicable	Not applicable
Venue Rental	10,600	1,233,300	1,243,900	Not applicable	Not applicable
Other Meetings-related Commodities	2,630,700	138,200	2,768,900	Not applicable	Not applicable
<b>Subtotal</b>	<b>4,417,600</b>	<b>4,946,400</b>	<b>9,364,000</b>		
<b>Total</b>	<b>\$10,510,600</b>	<b>\$7,599,900</b>	<b>\$18,110,500</b>	<b>\$100,736,729</b>	

\*Note: Totals may not add due to rounding.

### Country Comparison

For illustrative purposes, Table 23 presents a summary comparison of volume and direct spending related to meetings activity in Mexico and the U.S.

**Table 23:**  
**Comparison of Mexico and U.S. Studies**

<b>Category</b>	<b>Mexico</b>	<b>U.S.</b>
Year of Study	2010	2009
Number of Meetings	197,400	1,790,800
Attendance	23,060,000	204,724,000
Room Nights	24,250,000	250,000,000
Total Direct Spending <sup>1</sup>	\$18,110,500	\$263,444,000
TSA Tourism Output <sup>1,2</sup>	\$100,736,729	\$708,309,000

<sup>1</sup> In thousands USD

<sup>2</sup> Tourism Satellite Account comparison year is 2009

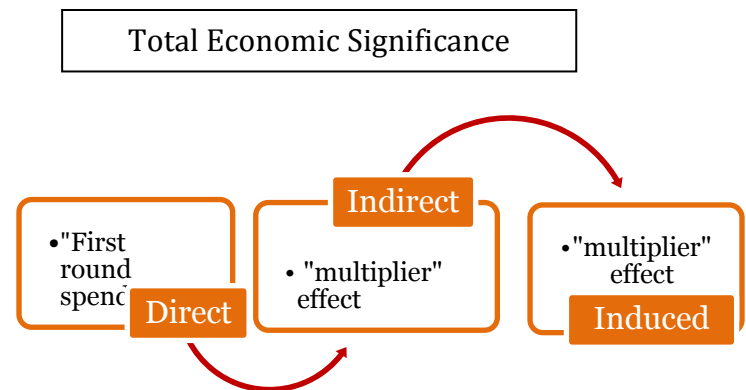
## Section 6: Total Economic Significance

This Report focused on the estimates of meetings volume and direct spending related to the meetings sector. To develop the total economic significance of meetings, an input-output analysis involving more in-depth economic calculations for output, employment, and income multipliers would be required and was not conducted for this Report. This type of analysis would capture "downstream" industry suppliers, purchases of goods and services in Mexico made as a result of labor income, and other such indirect/induced effects. At the request of SECTUR, however, we have presented estimates of total economic significance--beyond direct spending--which are based simply and solely on ratios and economic multipliers from other third-party sources which were neither analyzed nor verified. As a result, the illustrations of total economic significance including total output, contribution to GDP, employment, and labor income are estimates presented for illustrative purposes only and should not be relied upon.

Direct spending reflects the monetary expenditure carried out among the industries that comprise the meetings sector. Indirect spending is attributable to the meetings sector providers, and induced expenditure is expenditure carried out by employees in the sector of meetings and their suppliers.

### General Indication of Total Significance

Direct spending is considered the "first round" of spending, while increased activity or the indirect and induced benefits from subsequent spending rounds is commonly known as the "multiplier effect." The initial direct expenditures begin a spending process in which dollars cycle through the economy, generating this multiplier effect that supports additional spending (by second or third round recipients) and jobs. This cycle of spending by visitors, businesses, and employees is quantified by economic multipliers. Together, direct, indirect, and induced spending comprise the total contribution of meetings activity to an economy.





- **Direct:** Direct spending effects are measured within the industries identified as "direct beneficiaries" of meetings activity with respect to the source of spending. Direct spending occurs within the Mexico economy from purchases of goods and services attributable to the meetings activity.
- **Indirect:** Indirect spending is additional spending occurring within other industries that provide goods and services to the "direct" industries involved in meetings activity.
- **Induced:** Induced spending represents household spending of income earned either directly or indirectly from the meetings activity.

To provide a general indication of the total economic significance of meetings to the Mexico economy, estimates of total output, contribution to GDP, employment, and labor income were developed. The following are typically defined as:

- **Output:** Output is an economic concept that is akin to sales or revenue. The sum of output across all industries in the economy represents the total gross value of production. However, this total is not the same as GDP, because it double counts the output values of its inputs. In fact, taken together, the total gross output of all industries is significantly larger than a country's GDP. As such, the total output generated by meetings activity cannot be directly related to GDP. It is often presented to reflect the gross value of production directly and indirectly generated by meetings activity.
- **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 (i.e., those borne by consumers rather than producers).
- **Employment:** Consisting of full-time and part-time jobs.
- **Labor income:** Including wages/salaries and benefits.

### Direct Effects

For direct economic effects (in addition to direct spending), estimates were developed using ratios of contribution to GDP, employment, and labor income to direct output based on the Mexico TSA. Estimates for the direct contribution to GDP, employment, and labor income related to meeting activity in 2010 are presented in Table 24. Meetings activity directly contributed an estimated \$12.1 billion to GDP in 2010. In addition, an estimated 441,000 jobs were supported by meetings activity, and \$2.7 billion was paid to employees who directly benefited from meetings activity.

**Table 24:  
Mexico Meetings' Direct Economic Effects (in thousands USD)**

<b>Economic Contribution</b>	<b>Direct Spending (Output)</b>	<b>Contribution to GDP</b>	<b>Labor Income</b>	<b>Employment</b>
Direct Effects <sup>1</sup>	\$18,110,500	\$12,064,400	\$2,716,700	441,300

<sup>1</sup> Direct contribution to GDP, labor income, and employment estimates were based on the relationships between direct tourism output to each factor as illustrated in the Mexico TSA.

### Total Effects

To estimate the total effects from meetings activity in Mexico, multipliers were applied to output, contribution to GDP, labor income, and employment. For the contribution to GDP, the estimate was based on the multiplier derived from WTTC's *Travel & Tourism Economic Impact Report: Mexico*. Total output, labor income, and employment estimates were based on multipliers derived from *Resorts Timesharing in Mexico: Industry Size, Market Characteristics, and Economic Impacts*.

Table 25 presents the total economic effects related to meetings activity in Mexico in 2010 for output, contribution to GDP, labor income, and employment. Total output was estimated to be \$32.5 billion, while the total contribution to GDP was estimated at \$25.1 billion. Meetings generated \$4.7 billion in total labor income and supported an estimated 784,000 total jobs in 2010. Every direct job generated by meetings activity supported nearly two additional jobs in the Mexico economy.

**Table 25:  
Mexico Meetings' Total Economic Effects (in thousands USD)**

<b>Economic Contribution</b>	<b>Output</b>	<b>Contribution to GDP</b>	<b>Labor Income</b>	<b>Employment</b>
Direct Effects <sup>1</sup>	\$18,110,500	\$12,064,400	\$2,716,700	441,300
Indirect & Induced Effects <sup>2</sup>	14,381,600	13,021,400	1,958,400	342,400
<b>Total Effects</b>	<b>\$32,492,100</b>	<b>\$25,085,800</b>	<b>\$4,675,100</b>	<b>783,700</b>

<sup>1</sup> Direct contribution to GDP, labor income, and employment estimates were based on the relationships between direct tourism output to each factor as illustrated in the Mexico TSA.

<sup>2</sup> Total output, labor income, and employment estimates were based on multipliers derived from *Resorts Timesharing in Mexico: Industry Size, Market Characteristics, and Economic Impacts*. The total contribution to GDP was based on the multiplier derived from the WTTC's *Travel & Tourism Economic Impact Report: Mexico*.

\*Note: Totals may not add due to rounding.

## Meetings Direct Contribution to GDP Comparison

In Table 26, the estimated contribution of meetings to GDP of \$12.1 billion is compared to other industries. Since the most recent GDP data available (on an industry basis) is for 2009, the comparison to the 2010 meetings contribution is for illustrative purposes only, and is intended to provide a general indication of the meetings sector in relation to other industries. In the context of Mexico's total economy, 2009 GDP (net of taxes and financial intermediary services) was approximately \$840 billion. It should also be noted that the meetings sector contribution as well as the tourism contribution overlap with the contributions from other defined industries given that the meetings sector and tourism represents a collection of industries.

**Table 26:**  
**GDP by Industry (in thousands USD)**

<b>Industry Sector</b>	<b>GDP Contribution<sup>1</sup></b>	<b>Percent<sup>2</sup></b>
Manufacturing	\$147,257,738	17.5%
Trade	128,184,930	15.3%
Real estate and rental property and intangible	90,496,909	10.8%
Tourism	67,105,480	8.0%
Mining	66,567,548	7.9%
Construction	60,384,893	7.2%
Transportation and warehousing	56,881,451	6.8%
Educational services	43,906,308	5.2%
Government activities	37,414,684	4.5%
Financial services and insurance	32,085,057	3.8%
Agriculture, forestry, fishing and hunting	30,198,987	3.6%
Information in mass media	28,690,573	3.4%
Professional, scientific and technical	28,274,641	3.4%
Health care and social assistance	26,269,404	3.1%
Business Support, Waste Management, and Remediation services	21,396,790	2.5%
Other services except government activities	21,324,696	2.5%
Accommodation and preparation of food and beverages	19,514,765	2.3%
<b>Meetings</b>	<b>12,064,400</b>	<b>1.4%</b>
Electricity, gas and water supply pipeline	10,189,370	1.2%
Management of companies and enterprises	3,571,154	0.4%
Recreational, cultural and sporting and other recreational	3,181,868	0.4%
Net of financial intermediary services	(15,931,052)	
<b>GDP</b>	<b>\$839,860,712</b>	

<sup>1</sup> Meetings contribution to GDP represents 2010. Other industry contributions represent 2009. GDP is net of taxes on products.

<sup>2</sup> Percent does not add to 100% due to the inclusion of Tourism and Meeting industry sectors and the effect of financial intermediary services.

## 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

- 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
- 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.

Meeting Type	Definition
Convention	<ol style="list-style-type: none"> <li>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</li> <li>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</li> </ol> <p>There is a secondary exhibit component.</p>
Congress	<ol style="list-style-type: none"> <li>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</li> <li>2) Meeting of an association of delegates or representatives from constituent organizations</li> <li>3) European term for convention</li> </ol>
Seminar	<ol style="list-style-type: none"> <li>1) Lecture and dialogue allowing participants to share experiences in a particular field under the guidance of an expert discussion leader</li> <li>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</li> </ol> <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"> <li>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 relationships, but part of the event may be open to the general public</li> <li>2) Display of products or promotional material for the purpose of public relations, sales and/or marketing</li> </ol>
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>

Meeting Type	Definition
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	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).

### Attendee Origin

Origin	Definition
Local	Attendees who traveled less than 75 kilometers to attend a meeting and did not stay overnight in paid accommodations.
Domestic	Attendees who traveled more than 75 kilometers to attend a meeting or who stayed overnight in paid accommodations.
Foreign	Attendees who traveled from outside of Mexico to attend the meeting.

### Tourism-related Definitions

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 75 kilometers from their primary residence to attend the meeting. This definition of travel aligns with definitions outlined by the UNWTO and the Mexico TSA (see definitions below).
Tourism (UNWTO)	<p>The definition of travel used for this study aligns with the following definitions outlined by the UNWTO and the Mexico TSA:</p> <p>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.</p>
Tourism (Mexico TSA)	According to the Mexico TSA, tourism refers to the activities in which visitors are engaged. It encompasses all economic activities that are related to satisfying tourists' demands. Therefore, tourism cannot be defined independently of visitors and the activities in which they engage during their travel. Tourism, seen as the activities of tourists, represents a consumer function that is related to the production of goods and services that satisfy the needs of the visitors.

Term	Definition
Visitor (Mexico TSA)	The Mexico TSA defines a visitor any person that travels outside of his/her usual location for a period of less than 12 months for any reason, except those persons who will engage in activities that will generate income in the travel destination; refugees or migrant workers; diplomats; border or seasonal workers; travel employees; or persons seeking to establish new residence or employment. The term, thus, includes residents of the country who travel to other regions of the country or outside of the country, as well as persons who travel to Mexico from other countries.

## 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"> <li>a) In-house organizers are responsible for organizing the meeting for their own organization which is hosting or sponsoring the meeting</li> <li>b) Independent/Third-party organizers are contracted to organize the meeting on behalf of the meeting host or sponsor organization</li> </ol>
Venue managers	Managers of the following types of venues: <ol style="list-style-type: none"> <li>a) purpose-built meeting facilities (without lodging) such as conference centers and convention centers;</li> <li>b) meeting facilities with lodging (hotels, motels, resorts, etc.)</li> </ol>
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 (OCV).



## Apendix B: Exchange Rates

Mexican Pesos were converted to U.S. dollars, as needed. Exchange rates were primarily used to convert figures for 2009 and 2010. OANDA provided annual exchange rates as follows:

- 2009 - One U.S. dollar = 13.501 Mexican Pesos
- 2010 - One U.S. dollar = 12.635 Mexican Pesos

## Appendix C: Secondary Research Sources

The following secondary research sources were referenced for this study.

Organizations:

- Asociación Nacional de Oficinas de Convenciones y Organismos Similares A.C. (ANDOC)
- Center for Exhibition Industry Research (CEIR)
- Centro de Estudios Superiores de Turismo (CESTUR)
- Convention Industry Council (CIC)
- Collegiate Conference and Events Directors-International (ACCED-I)
- Cvent
- DataTur
- Destination Marketing Association International (DMAI)
- D.K. Shifflet & Associates
- Incentive Federation Inc.
- The Incentive Research Foundation (IRF)
- Instituto Nacional de Estadística y Geografía (INEGI)
- 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)
- Menlo Consulting Group, Inc. (MCG)
- OANDA
- Oficina de Congresos y Convenciones de la Ciudad de México
- Oxford Economics
- PhoCusWright, Inc.
- PricewaterhouseCoopers (PwC)
- Professional Convention Management Association (PCMA)
- Secretaría de Comunicaciones y Transportes
- Secretaría de Turismo (SECTUR)
- Sistema Integral de Información de Mercado Turísticos (SIIMT)
- Smith Travel Research
- Society of Incentive & Travel Executives (SITE)
- Starwood, Allan Duggan
- TNS
- Trade Show Exhibitors Association (TSEA)
- Tradeshow Week
- United Nations World Tourism Organization (UNWTO)
- U.S. Bureau of Economic Analysis (BEA)
- U.S. Office of Travel & Tourism Industries (OTTI)
- U.S. Travel Association
- World Travel & Tourism Council (WTTC)

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

- *Análisis de temas seleccionados del segmento de congresos, convenciones y ferias especializadas en México* (CESTUR, SECTUR)
- *Business Travel News, Corporate Travel Index*
- *CIA World Factbook*
- *CEIR Exhibition Industry*

*Census*

- CEIR *Exhibition Industry Index*
- *Destination Marketing: Understanding the Role and Impact of Destination Marketers* (PhoCusWright, Inc.)
- DMAI MINT data
- DMAI convention expenditure data
- *Doing Business: Country Profile for Mexico* (World Bank)
- *Driving Our Future: The Top 11 Incentive Trends for 2011* (IRF)
- *The Economic Contributions of Anglers to the Los Cabos Economy* (Southwick Associates, Inc, Nelson Resources Consulting, Inc., FIRMUS Consulting)
- *The Economic Contribution of Copyright-Based Industries in Mexico* (Structura)
- *The Economic Contribution of Meetings Activity in Canada* (Maritz Research Canada and The Conference Board of Canada)
- *Economic Factors Affecting Global Meetings* (PCMA)
- *Effects of a Down Economy on The Incentive Industry* (IRF)
- *EIBTM Industry Trends & Market Share Report*
- *Estudio Estratégico de Viabilidad de Segmento de Congresos y Convenciones*
- *The Future of Destination Marketing* (DMAI)
- *Groups and Meetings: Market Opportunity Redefined* (PhoCusWright, Inc.)
- *Hotels.com Hotel Price Index*
- *IAAM Statistics Report 2000-2009*
- *ICCA International Association Meetings Market*
- *Las Cámaras y Asociaciones, detonadoras de la Especialización en Turismo de reuniones* (ANDOC)
- *M&C Meeting Facilities Search* (formerly *Official Meeting Facilities Guide*) (online search engine)
- *M&C Meetings Market Report*
- *The Market for Incentive Travel, Motivational Meetings and Special Events* (IRF)
- *Market Study of Incentive Travel in Mexico* (SITE)
- *Meetings Market Trends Survey* (Meetings Media)
- *Meetings Tourism Study* (MCG)
- *Mexico Expands Meetings Space* (SmartMeetings Article)
- *MPI FutureWatch*
- *MPI Meetings and Events Purchasing: An Analysis of Business Relationships in Europe*
- North American Industry Classification System (NAICS)
- North American Product Classification (NAPCS)
- *PCMA Annual Meetings Market Survey*
- *PCMA Meeting Planner Intentions Survey*
- *People, Plane, Profit and the Quest for Sustainability* (MPI)
- *PwC Convention Center Report*
- *PwC The Economic Significance of Meetings to the U.S. Economy*
- *Oxford Economics' The ROI of Business Travel*
- *Resorts Timesharing in Mexico: Industry Size, Market Characteristics, and Economic Impacts* (Ragatz Associates)
- *Sistema de Cuentas Nacionales de México: Cuentas de bienes y servicios 2005-2009*
- *Site Index* (November 2010, Site International Foundation)
- *Trade Show Week Databook*
- *Trade Show Week Major Exhibit Hall Directory*
- *UNWTO Global Meetings Initiative Volumes 1-3*
- *UNWTO Measuring the Economic Importance of the Meetings Industry: Developing a Tourism Satellite Account Extension*
- U.S. Travel Association "Travel Economic Impact Model"
- *WTTC Travel & Tourism Economic Impact: Mexico*

## Apendix D: Acknowledgments

We would like to thank the following individuals for their valuable time and insights in responding to the various surveys. Please note that this does not represent all respondents, as those wishing to remain anonymous are not included in this list.

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- Alberto Rosenbaum, Intermeeting
- Alfredo Gutierrez, Anfitriones Nacionales
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- Ana Teresa García Sierra, Hotel Melia Azul Ixtapa
- Angela Caraway, The Caraway Management Group, Inc
- Antonio Arelle Barquet, La Casa Del Atrio
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- David O'Connor, Meeting Connections, Inc.
- Dena Rose, Project Management Institute
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