



Asia-Pacific
Economic Cooperation



APEC PERU
2024



IDENTIFICATION AND ANALYSIS OF GUIDELINES IMPLEMENTED FOR THE DEVELOPMENT OF **THE MEETINGS INDUSTRY** IN THE APEC REGION

APEC Tourism Working Group

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1. Glossary

Bidding Book: A document that contains a mapping for the MICE segment, detailing the calendar of events and air connectivity, among others.

Business event: A business event is any public or private activity with a common interest or vocation, held online or in a specific venue/s and hosted by an organisation/s. This includes conferences, conventions, symposia, congresses, incentive group events, marketing events, special celebrations, seminars, courses, public or trade shows, product launches, exhibitions, company general meetings, corporate retreats, study tours or training programs.

Business tourism: Business tourism is a type of tourism activity in which visitors travel for a specific professional and/or business purpose to a place outside their workplace and residence with the aim of attending a meeting, an activity or an event. The key components of business tourism are meetings, incentives, conventions and exhibitions.

The term "meetings industry" within the context of business tourism recognizes the industrial nature of such activities. Business tourism can be combined with any other tourism type during the same trip.

Business tourism destination: A specific geographical area, with its infrastructure and services and the administrative capacity to hold conferences, conventions, congresses, incentives, trade fairs and domestic and international meetings.

Capacity: The capacity of a space expressed by the number of people in the space according to the different formats.

Conference: An event organised to share points of view, communicate messages, debate or promote a topic or point of view.

Congress: Periodic meeting in which the members of an association, organisation or entity participate to discuss previously established issues

Convention: A formal and generic event organised by an association to provide information regarding a particular situation and then to deliberate and establish consensus among its participants.

Convention Bureau: Entity that develops a series of strategic actions that facilitate the attraction of meetings and events for a destination. They can be only public investment, mixed (with public investment and contributions from local partner companies) or private (financed by their partners).

Convention Center: This is an infrastructure specially conceived to hold different types of actions, which may range from fairs to congresses, including company conventions, product launches, meetings, and cultural and musical events.

Event Recruitment: This refers to activities related to recruiting events for a specific venue, place, or destination. This action is coordinated between suppliers, organisations involved (whether public or private), and the convention bureau of an economy or city to ensure that a meeting, fair, congress, incentive trip, company convention or event is finally held in the place it is bidding for.

Host: A company or institution organising the meeting or event.

Incentive event: An award event or incentive trip focused on recognising people who achieved or exceeded established objectives. The participants are recognised for their good performance with the trip experience.

Meetings: Diverse cultural, social, political, sporting or religious events (such as concerts, masses, championships, rallies, or awards ceremonies, among others). It also includes international government meetings such as the OAS and UNESCO.

Meetings industry: To highlight purposes relevant to the meetings industry, if a trip's main purpose is business/professional, it can be further subdivided into "attending meetings, conferences or congresses, trade fairs and exhibitions" and "other business and professional purposes". The term meetings industry is preferred by the International Congress and Convention Association (ICCA), Meeting Professionals International (MPI) and Reed Travel over the acronym MICE (Meetings, Incentives, Conferences and Exhibitions) which does not recognize the industrial nature of such activities.

Networking: Professional contacts that can be generated in a given situation or event due to interaction with participants.

Participants: People who attend meetings, either as delegates or exhibitors.

Suppliers of other products and services: Suppliers of food, transportation, accommodation services, tourism services, and meeting equipment rental services, among others.

Trade shows and exhibitions: Events where products and services are exhibited and promoted to members or guests of a particular industry.

Venues: Places where it is possible to organise an event operation.

Workshop: A commercial presentation during a congress celebration where various organisations or private companies offer services through stands and audiovisual equipment.

2. Abbreviations

APAC: Asia Pacific

APEC: Asia-Pacific Economic Cooperation

CB/CVB: Convention Bureau/Convention & Visitors Bureau.

CICE: Certified International Convention Executive Course hosted by ICCA

COCAL: Federation of Congress Organising and Related Entities of Latin America.

DMC: Destination Manager Company. Local company offering creative itineraries and operational logistics with extensive knowledge of incentive travel.

DMO: Destination Manager Organizations.

GDP: Gross Domestic Product

ICCA: International Congress and Convention Association.

IMEX: Meeting and Tourism Industry Exposure. The world's largest gathering of events and incentives.

ISES: International Special Events Society.

MICE: Meetings, Incentives, Conventions and Exhibitions.

MINCETUR: Ministry of Foreign Trade and Tourism (Peru).

MPI: Meetings Professionals International. It is the world's largest event association, with over 22,000 members in 20 economies.

PCO: Professional congress organiser. It is a company or professional dedicated to organising and planning all types of events.

SDG: Sustainable Development Goals United Nations Member States adopted as part of the 2030 Agenda for Sustainable Development.

UN: The United Nations Organization was officially created on October 24, 1945. Currently, 193 States are United Nations members, represented in the deliberative frame, the General Assembly.

UN Tourism: It is the agency specialising in the tourism sector within the United Nations system.



3. Introduction

The Asia-Pacific Economic Cooperation (APEC) is an economic forum comprising 21 economies in the Asia-Pacific region, considered to be the most dynamic region in the world.

APEC aims to promote greater prosperity in the Asia-Pacific region through the implementation of the “APEC Putrajaya Vision 2040,” which identifies three pillars: trade and investment; innovation and digitalisation; and strong, balanced, secure, sustainable, and inclusive growth.

APEC promotes quality economic growth among its members through economic and technical cooperation, human security, trade, investment, the digital economy, economic inclusion, and support for initiatives to improve sectoral public policies, among other initiatives.

The different initiatives, projects, and proposals adopted in all the Forum's working groups will focus on achieving the 2040 goals.

Peru has been selected to host the Asia-Pacific Economic Cooperation (APEC)2024. The Ministry of Foreign Trade and Tourism – MINCETUR, has volunteered to carry out the identification and analysis of guidelines to be implemented for the development of the meetings industry in the APEC region within the framework of the activity "Identify the potential of thematic travel and tourism corridors such as sports tourism, MICE tourism, quality tourism, etc." of Priority Area 2: Human Capital Development of the APEC Tourism Strategic Plan 2020-2024.

Regarding the research topic, the MICE industry significantly impacts the environment and communities, as companies organise events and exhibitions to promote the local region and market their products (Global Sustainable Tourism Council, 2024). This tourism model is undergoing profound changes and, as a result, is becoming increasingly important for the economic and social development of the economy.

In the current situation, it is essential to carry out and implement planned actions with a strategic vision that allows us to define objectives and prepare the necessary strategies to achieve them. This plan must include all the actors involved in the sector, particularly the governments of the different economies.

For all these reasons, this technical document has been submitted and should be considered as an open document that must be enriched, agreed upon and updated over time.

This proposal identifies and analyses the implementation of guidelines in the Meetings Industry segment of the Asia-Pacific region to develop recommendations aimed at diversifying the tourism offering of destinations in the APEC region, focusing their efforts on the development and promotion of the meetings industry segment.

Likewise, the implementation of this document, which will provide recommendations for possible guidelines, is also relevant to the meetings industry, as it identifies baselines for development in economies and prioritises articulation with government, regional, and local authorities and meetings with industry leaders.

This operational and dynamic working tool will enable the sector to be articulated and strengthened with a new, competitive and sustainable boost.

4. Theoretical Framework

Business tourism refers to a person's travel outside their local area to attend a meeting, event, convention, congress, incentive trip, trade show or other professional or academic conference. The meetings industry, therefore, includes all the economic activities necessary to make that trip and meeting possible. For example, it takes into account the activities of organising events and renting venues, as well as the activities needed to provide the accommodation, transport and tourism services required by the people making the trip (MINCETUR, 2019).

The meetings tourism industry has five key players: participants, hosts, event organisers, venues, and suppliers of other products and services (UNWTO, 2006).

This segment is vital to the economy through its direct, indirect and induced impacts on the domestic GDP (UNWTO, 2006):

- **Direct impact:** It directly impacts GDP through the total expenditure incurred in the activity. This expenditure includes both the investment made by the organisers in holding the meeting and the spending of tourists attending the meetings.
- **Indirect impact:** Through the multiplier effect on the economy, increased spending by organisers or tourists impacts their direct suppliers, affecting the whole value chain.
- **Induced effect:** The salaries paid to workers employed in the organisation of events contribute to the dynamism of the economy.



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Meetings also have an inherent value for the companies or institutions that decide to organise them. For example, they consider them valuable because they allow them to increase the visibility of their products, strengthen their brand, and access new buyers or markets, among other benefits (Edwards et al., 2010). In addition, these events facilitate investment, trade and innovation in industry through the dissemination of information and the strengthening of contact networks (UNWTO, 2014).

In addition, the meetings industry also has a positive impact on the domestic tourism industry. Some of the benefits are:

- It attracts tourists who are unlikely to have visited the city for any other reason, increasing the likelihood that they will return.
- It helps to regulate the seasonality of tourist demand, as events are usually organised in the low season.
- It contributes to improving the quality of local services, as meeting visitors tends to be more demanding than traditional tourists (UNWTO, 2014).

5. Boosting competitiveness

The combination of the “tourism” and “meetings” sectors is one of the productive areas with the most significant growth potential in the global context, as it benefits a wide range of stakeholders.

In addition to this growing interest and the opportunity for comprehensive positioning that it can offer, it has an evident capacity to support processes of productive and economic reorganisation of territories land.

In 2019, the International Congress and Convention Association (ICCA) published data highlighting the significant role of the business events industry. Not only does it contribute a staggering USD1.5 trillion to global GDP, but it also supports 26 million jobs.

Since the pandemic, there have been several significant changes in how the meetings industry is produced and consumed. These are now a consolidated reality to face the future with guarantees of success.

According to ICCA data (2019), the Asia-Pacific region is home to over 1,000 associations, representing 10% of the global association leadership. This achievement is second only to Europe, which has more than 5,000 associations.

The development of technological, organisational, infrastructural, commercial and socio-economic tools and instruments is the key to addressing the future and ensuring greater competitiveness and strength of the sector.

The meetings industry is now necessary and a cross-cutting opportunity for all APEC members. For these reasons, this document seeks to systematise and consolidate the strategies and actions for competitive, sustainable and innovative meetings industry, which has been identified as a strategic sector for developing tourism in the Asia-Pacific region, based on the knowledge of the different policies implemented in each economy.

6. Objectives and achievements

The development of this document prioritises one main objective and three secondary objectives for the development of the meetings industry. In addition, the document identifies a structural, a functional, and an economic objective:

Main Objective

- To analyse and propose recommendations for potential guidelines for the development of the meetings industry in the different destinations of the Asia-Pacific region.

Secondary Objectives

- To identify the meetings industry offer of the economies of the Asia-Pacific region.
- To define an integrated coordination system in the meetings industry by implementing a questionnaire.
- Identify tools to promote this specialised tourism segment.

Structural objective

It is essential to define a model that configures a more competitive and sorted meetings industry offer, agreed upon by all actors involved in the APEC economies, based on the provision of knowledge from the different working tools that allow a sustainable offer, coordinating managerial, economic, social and patrimonial aspects, in addition to operational marketing arguments aimed at specific target audiences.

Functional Purpose

To establish a comprehensive coordination system based on a specific and functional programme supported by the MICE model of each APEC economy through strategic, tactical and operational management. The programme is based on the principle of efficiency and complementarity between the various stakeholders responsible for the meetings industry in each economy.

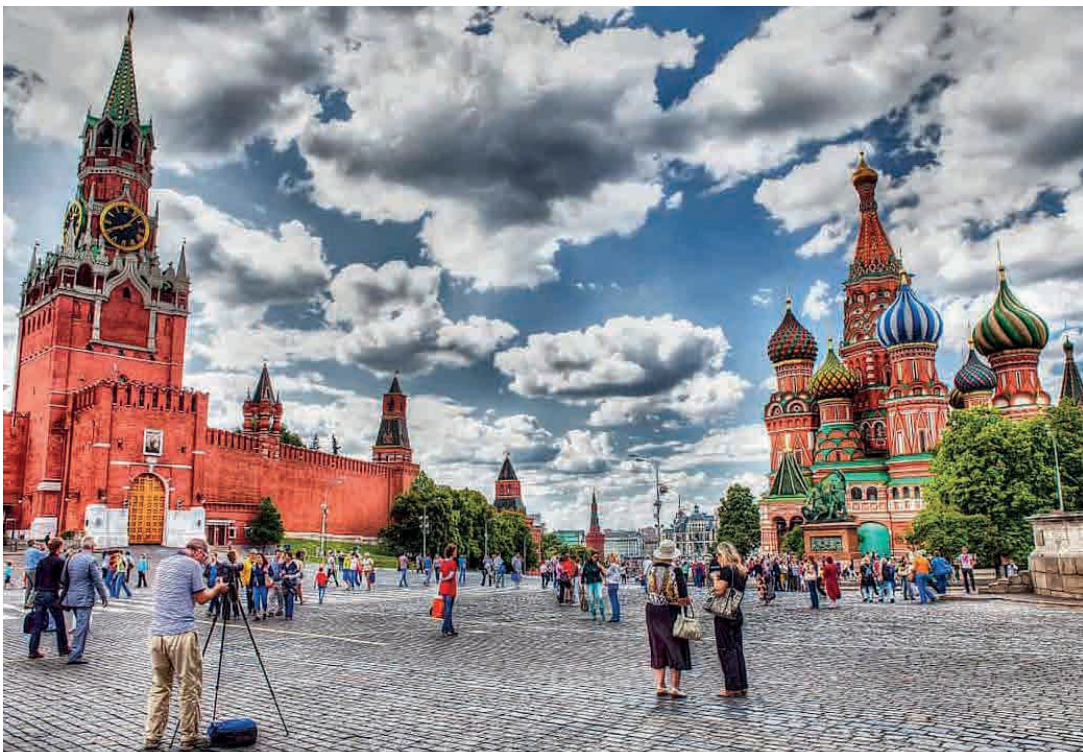
Economic Objective

Likewise, this document also seeks to achieve a principle of efficiency applied to the investments made in pursuit of the objectives pursued. For this reason, it is proposed to redirect part of the current investment effort towards a comprehensive attention programme for the meetings industry development units in order to achieve, through a continuous and coherent economic endowment, the facilitation of the strategic meeting between the public and private sectors in the field of tourism.

Achievements

As part of the study, the meetings industry offer of 11 economies in the Asia-Pacific region has been identified. Using an agreed questionnaire, a comprehensive coordination system for the meetings industry was defined, and tools to promote this specialised tourism segment were identified.

In this sense, it was possible to successfully analyse and propose recommendations for potential guidelines for the development of the meetings industry in the different destinations of the Asia-Pacific region.



Plaza Roja, Moscu, Rusia © Tours Privados Rusia

7. Methodology

This research requires the integrated use of different scientific methods. As a starting point, it is essential to know about other studies dealing with aspects related to the research object. Based on the bibliographic review of secondary sources, the aim is to learn the “state of the art” aspects of the research objectives. “The literature review often plays a fundamental role in the formulation of research projects; it indicates the state of knowledge on a question and is a source of stimulation for ideas, both meaningful and methodological” (Veal, 1994: 50). It was mainly carried out using the documentary sources available in different virtual libraries. Within the same bibliographical review, in addition to articles and books, it was also necessary to resort to other unpublished sources available only in organisations related to the meetings industry.

The working methodology follows a sequential work process that integrates all the necessary aspects to define strategic guidelines on the meetings industry for APEC economies.

In addition to the theoretical knowledge acquired through the bibliography, the proposed study requires exhaustive fieldwork to determine the state of the meetings industry in the different economies of the APEC region, analysing and comparing their working models to draw conclusions of interest and relevance.

To this end, it is possible to systematise the information collected from the economies and consolidate it with their opinions and comments, which will serve as a primary input for strengthening the diversification of the tourism offer in the tourist destinations of the APEC member economies.

This information-collecting methodology was chosen because “it creates a real exchange in which the researcher’s interlocutors express their perceptions of an event or situation, their interpretations and their experiences” (Quivy and Van Campendhoudt, 2006: 173-174).

The proposed questionnaire has been structured in Word format, based on the same questions in all cases, in English. The aim is to treat each relevant aspect in a standardised way, allowing the subsequent comparison of the models by blocks of analysis.

The questionnaire combines a proposal for a quantitative analysis to characterise the meetings industry offer in each economy with a qualitative study to obtain more complete and heterogeneous information, taking into account the specificities of each case.

It should also be noted that, in addition to the Word format developed to collect the information, a form in Google Forms has also been designed to facilitate the collection of information from the economies that have access to this platform.

About the use of the form or virtual format

The virtual form, in Word format and with a Google Forms link designed to collect information on the meetings industry in APEC member economies, was widely distributed to the designated representatives of each economy through an email sent by the Project Overseer on March 27th, 2024. Likewise, a deadline was also set for the receipt of the forms, which was later extended to ensure the active participation of all members.

About the Analysis of Collected Information

Following the data collection, a comprehensive analysis of the information was developed, using qualitative and quantitative analysis techniques to identify patterns, trends, and areas of convergence in the responses of APEC member economies.

On the consolidation and systematisation of the information collected

The data collected and the analysis conducted have been consolidated and systematised in an accessible and understandable format, using graphs to submit the most relevant findings.

A total of 11 responses have been collected from Australia; Chile; Japan; Malaysia; Papua New Guinea; Peru; the Philippines; Russia; Singapore; Chinese Taipei and United States.

After processing the information received, APEC economies will review the draft document. Subsequently, these submissions will be integrated to update and improve the technical document, which APEC economies will review again.



8. Identification of key elements

The key elements discussed in this section relate to the planning, development and management of meetings destinations in APEC economies. They are essential for understanding the factors involved in the functioning of the meetings industry and the dangers of not exercising effective control in the management of this segment, as this would inevitably lead to a spontaneous and unsustainable development process.

In this way, it will be possible to structure the appropriate guidelines, paying particular attention to the behaviour and relationship between destinations and consumers of business tourism in APEC economies:

1. Effective, sustainable management through policies, sustainability plans and risk management programmes focused on small and large domestic and international events for the association and corporate markets.
2. The adaptation and development of infrastructure and equipment for the management of events in economies, in terms of physical spaces to manage the demand for events: meeting rooms, venues, exhibition sites, hotels, among others, and the prioritisation of physical and digital connectivity.
3. The development and diversification of tourism products complement the meetings industry offer to strengthen its competitiveness and attractiveness and increase domestic and international travel flows in the MICE meetings industry segment.
4. The identification of association and corporate markets, classification categories, types of events and target audiences.
5. To plan and manage the promotion, marketing and recruitment of the meetings industry segment.



Ariel view of Downtown, Port Moresby, Papua New Guinea,

6. The impact on the community: local employment generation, legacy, and long-term benefits for host communities.
7. Identification of the public-private actors and structures promoting the destination: Convention Bureaus, in terms of cooperation and articulation and the levels of interest and importance of intervention.

9. Analysis of Current and Future Trends

Over the past 60 years, the meetings industry has grown significantly. According to ICCA, while only 1,718 of these meetings were held between 1963 and 1967, the number multiplied by 38 between 2013 and 2017. Between these years, 65,182 international events were held worldwide - around 13,000 per year (MINCETUR, 2020).

According to figures by the Events Industry Council (2018), business events involved more than 1.5 billion participants across more than 180 economies, generating more than USD1.07 trillion of direct spending, representing spending to plan and produce business events. On average, USD704 was spent per business event participant and the top 50 economies accounted for USD1.03 trillion of business events direct spending, representing 96% of the global total.

Due to the pandemic and travel restrictions, the meetings industry in the years 2020 to 2022 has suffered greatly in recent years. Although travel restrictions have now been lifted, the global economy and the supply chain in many sectors are still in crisis. The development of technology and the massive use of videoconferencing have led many companies to be more conservative in deciding which events to attend. As a result, they have introduced stricter cost controls on travel. The intense competition in the meetings industry segment means that organisers are spending more time understanding the latest needs of buyers, customers and other stakeholders to make their events more results-oriented. Currently, event themes and agendas are more personalised, and networks are strengthened to identify good working partners.

However, the growth of the meetings industry segment has yet to match the growth in the skills of the industry's workforce, and there is still a shortage of experienced workers in many economies. The operators of this specialized segment need to invest time and effort in attracting, training and retaining staff, using technologies to improve work efficiency, and exploring new locations and business themes (ICCA, 2024a).

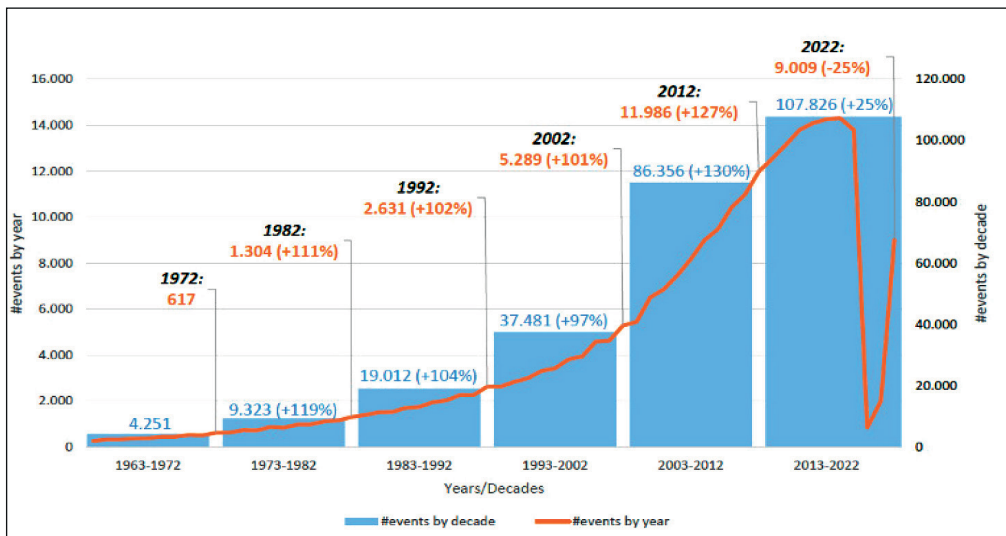
Based on the ICCA publication (2024a) on the evolution of the meetings industry worldwide over the last 60 years, the following findings are extracted:

1. Number of face-to-face events 1963-2022

Between 1963 and 2022, the number of face-to-face events roughly doubled every decade. The most significant increase was between 1993-2002 and 2003-2012, with a rise of +127%. The smallest increase was between 2003-2012 and 2013-2022, with a rise of +25%. In 2022, the number of face-to-face events was 9.009, comparable to the number of face-to-face events in 2008.

Between 1963 and 2022, the number of cities visited by associations increased more than tenfold, from 653 (1963-1972) to 7192 (2013-2022).

Chart 1: Number of face-to-face events 1963-2022



Source: ICCA 2024a

2. Number of face-to-face attendees 1963-2022

Between 1963 and 2012, the number of in-person passengers increased from +50% to +59%, +78%, and +79% in each decade. The smallest increase was between 2003-2012 and 2013-2022, with a rise of +11%. In 2022, the number of in-person passengers was 3.732 million, comparable to the number of in-person passengers in 2009.

Over the past four decades, APAC cities have hosted events with the highest number of participants, with Seoul taking the top spot from 1983 to 1992 and 2013 to 2022.

3. Number of face-to-face event venues 1973-2022

The market share for “Hotels” increased from 32% to 40% between 1973-1982 and 2013-2022, resulting in the largest market share in the last decade. The market share for “Universities” increased from 16% to 30% over the same period, resulting in the second-largest market share in the last decade.

Both types of venues have grown at the expense of “Convention Centres”, whose market share has fallen from 39% to 20% over the same period. “Other Venues” have remained stable over the decades, with a market share between 8% and 12%. There is no significant data on venues for the years 1963-1972.

The average number of participants for conference centres between 2013 and 2022 is three times higher than for hotels.



4. Top 5 subjects for face-to-face events by decade 1963-2022

The market share for “Medical Sciences” decreased from 35% to 29% between the decades 1963-1972 and 2013-2022, remaining the largest market share in all decades despite the downward trend. The market share for “Science” decreased from 29% to 24% between 1963-1972 and 2013-2022, remaining the second largest market share in all decades except for the decade 2013-2022.

The market share for “Technology” increased from 13% to 25% between 1963-1972 and 2013-2022, becoming the second largest market share in the last decade at the expense of “Science.”

The market share for “Industry” and “Education” has remained relatively stable throughout the decades, with a combined market share of 11% in 2013-2022.

Between 1993 and 2012, Computer Science overtook Engineering as the leading field of technology and has been in the lead ever since.

5. Expenditure in USD for face-to-face events 1993-2022

Between 1993 and 2017, the total estimated expenditure (in USD) for face-to-face events increased by +67%, +25%, +45%, +42% and +18% every five years. The expenditure for 2022 was USD 8.858 million, a decrease of -18% compared to 5 years ago (2017). The expenditure for 2022 is comparable to the expenditure for 2011.

Particularly for the year 2019, ICCA estimated an expenditure of USD11,102 million for face-to-face events. Compared to 2019, the loss of face-to-face spending due to the COVID pandemic for the years 2020-2022 was USD10,413 million; USD9,445 million; USD2,244 million; totaling USD22,102 million during these recession years.

There is no significant data on expenditure for the years 1963-1992. The calculation of expenditures is based on the number of events, the number of pax, registration fees, and conversion factors. This conversion factor was determined based on historical expenditure studies carried out by CVBs and was confirmed during an expenditure study by ICCA at the 58th ICCA Congress, Houston, 2019.

10. Analysis and interpretation of research findings

After the conceptual review of the research components, the following practical phase contributes to achieving the proposed objectives and goals. Therefore, it is imperative to know and analyse the results obtained in the different economies to understand the current state of the meetings industry in the APEC region. In this sense, the research focused on the study and analysis of 11 cases corresponding to the economies that responded to the survey.

The detailed analysis of the experiences aims to identify the most relevant factors of the meetings industry that can serve as a model for other APEC economies. The specific and general conclusions proposed from the fieldwork will allow the structuring for the management of business tourism destinations and resources.

The 11 economies analysed present similar analogies and issues in their meetings industry development models, although they also present significant differences. Therefore, the comparison and analysis require a deeper reflection that allows us to understand their reality, needs, issues, and challenges as business tourism destinations in more detail, taking into account the wide range of variables involved.

In this sense, this section will compare the parameters related to APEC meetings industry structured in different sections and subsections that allow us to analyse and understand the situation in which they find themselves in greater depth and precision. The following pages contain comparative tables that collect specific comments for each evaluated aspect and a general interpretation that reflects on the right path to achieve truly sustainable business tourist destinations at all levels.

These parameters analysed include the considerations expressed in the sections dedicated to the identification of the strengths and weaknesses of the destinations analysed. They will later articulate the identification and analysis of potential guidelines for the development of the meetings industry in the Asia-Pacific region.

The quantitative results of the survey are presented in the table below. The qualitative results are analysed as a summary for each responding economy.

Table 1: Quantitative Information on the meetings industry in APEC Economies

	AUS	CHL	JPN	MAS	PNG	PE	PHL	RUS	SGP	CT	USA
MICE travel contribution	USD20,900 million	No data	USD6,883,045 million	USD45.93 million	No data	USD575 million - 0,3%GDP	USD17.48 million - 0.8%GDP	USD43,000 million - 3%GDP	1% of GDP (2019)	No data	No data
International tourist arrivals with Business Tourism motivation	742,000	No data	4.37 million	153,529 international delegates	29,059	No data	No data	No data	1.8 million	496,816	5,45 million
Stay and MICE inbound tourism expenditure	USD2,600 million	No data	Meeting >6.7nights Incentive Travel >5.2 nights Convention >6.0 nights Exhibition/Event >5.5 nights	4.9 days – USD112 million	No data	Between 3 and 11 days - USD309/day	USD706/pax	6.95 days - USD540/day	USD2.36 billion (Jan – Sep 2019)	No data	USD329,000 million
Stay and domestic MICE tourism expenditure	USD18,300 million	No data	2.3 days – USD9,24 million	USD0,083 million	No data	3 days - USD168/day	USD140/pax	USD8,7 million	No data	1.63 days - USD120/day	25,6 days
Tourist plant (≥4*) in the 3 main MICE destinations	No data	34,152 rooms 26,330 delegates	No data	3,000	No data	Lima: 11,619 Cusco: 4,700 Arequipa: 736	4	Sochi: 8,783 Moscu: 6,148 San Petersburgo: 1,181	86 hotels providing 34,392 rooms	6,400	No data
Number of events of international character held and category	In total, 43.7 million people attended	61	530	177	No data	40	236	1,500 major exhibitions per year in 50 cities in Russia	27	No data	No data
Number of events of domestic character held and category	one of the 484,000 events held	No data	No data	38	No data	60	10.518	150,000	No data	No data	No data
Number of MICE infrastructure and equipment	No data	152 Hotels 65 venues	No data	196	No data	Lima: 10 Cusco: 5 Arequipa: 5	No data	15,000 accommodation infrastructure with 600,000 beds	6 MICE purpose-built venues and 71 hotels	No data	No data
Number of venues and specialized infrastructure for sporting and multipurpose events	No data	No data	No data	51	4	140 facilities (28 in Lima)	No data	134 stadiums and 22 indoor ice rinks	3	No data	No data
Number of PCOs	No data	No data	No data	178	2	10	No data	20	14 PCOs and 21 PEOs	No data	No data
Number of DMCs	No data	No data	No data	189	5	25	No data	1,500	12	No data	No data
Number of Convention Bureaus	No data	No data	73	5	1	4	No data	5	1	No data	No data
Number of associations with MICE capacity	No data	No data	No data	131	No data	No data	No data	3,000	No data	No data	No data
Number of academic teaching programs of MICE professionalization (>90horas)	3	No data	No data	15	4	0	No data	50	2	No data	No data
Number of agents/companies CICE	No data	No data	No data	No data	No data	No data	No data	No data	1	No data	No data
MICE tourism products	No data	131	No data	No data	No data	5	No data	50	80	No data	No data

Sour Source: Survey developed by each economy. Own elaboration.

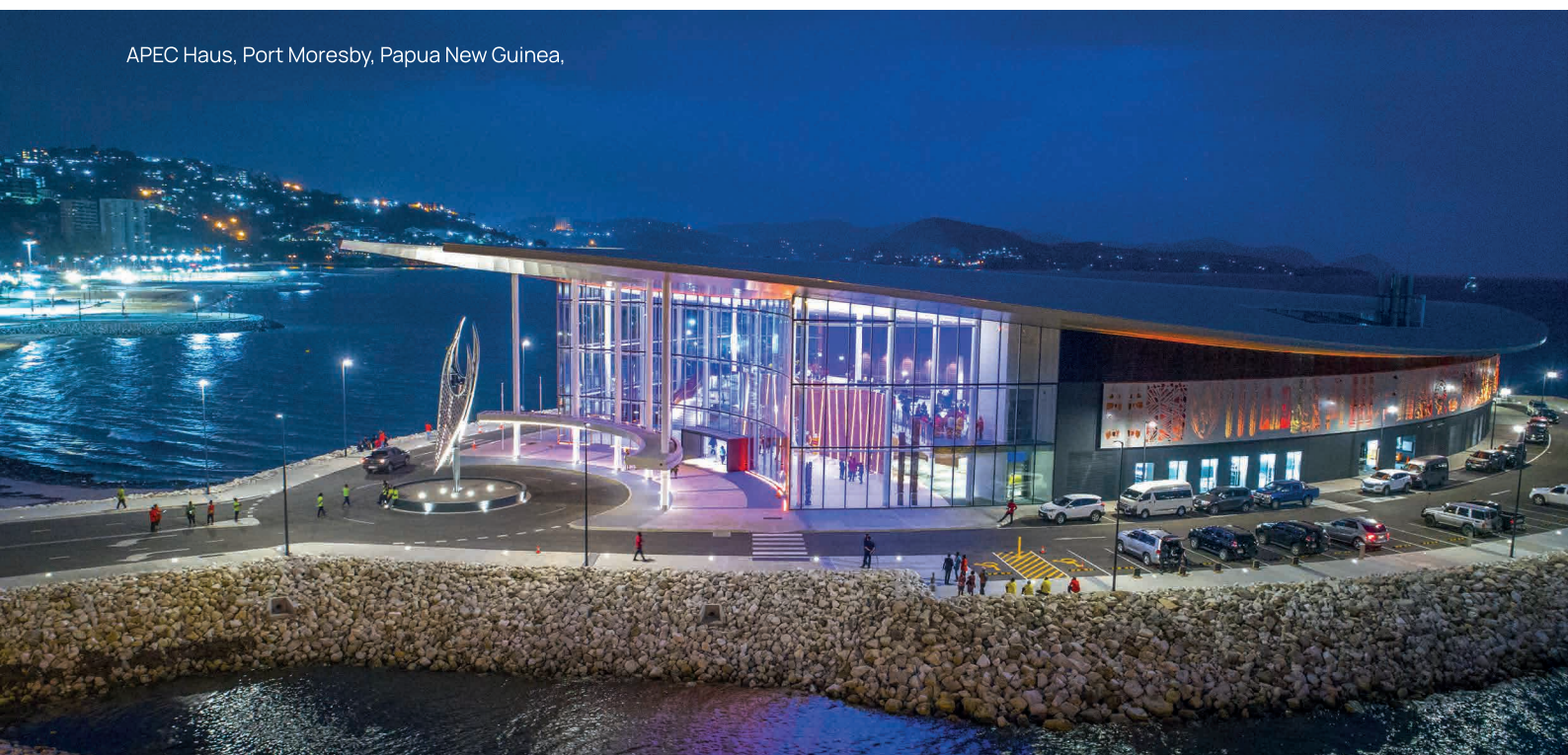
About the qualitative analysis, a consolidated summary of the main responses obtained with the tool used is presented below:

The policies developed for the meetings industry segment differ depending on the economy analysed, although they have points in common. The meetings industry relations between these 11 economies are essential to understand the reality of this segment and its future projections. In this respect, all the cases studied show a growing interest in this segment year after year, especially when overcoming the pandemic. All economies are increasing the number and technology of their venues, with each area offering better specialized infrastructures. In addition, the development of this type of facility offers new possibilities for tourist and non-tourist use, complementing each economy's commercial and service offerings and making it increasingly competitive.

The contrast is complex when analysing economies as different as Russia and the United States, which are clearly more prominent than the others. There is also a notable contrast in the development of some economies, such as Singapore; Japan and Malaysia, compared with other less developed economies, such as the Philippines and Papua New Guinea.

In terms of the SWOT results, almost all economies have a domestic strategy and government support for the development of the segment. For example, Australia has a THRIVE 2030 strategy, which sets out a long-term plan to grow the sector. Only Papua New Guinea does not currently have a meetings industry policy. Chinese Taipei has a programme to encourage foreign groups to engage in the meetings industry in its economy.

APEC Haus, Port Moresby, Papua New Guinea,



Although the less developed economies currently have limited venue capacity, the improvement of specialized infrastructure and facilities is growing, as are the destinations with the meetings industry capacity and, in almost all cases, there is physical capacity for this segment to develop. Convention centres and infrastructure in all economies must comply with municipal, state and federal regulations and standards. However, some economies, such as the Philippines and Papua New Guinea, face challenges with slow and costly internet connectivity, which limits the development of this sector. In contrast, another economy, Singapore, is a world-class business tourism destination with more than 7,000 multinationals and 37,400 international companies operating locally.

The pandemic has significantly slowed the international meetings industry, and the availability of videoconferencing and online event platforms has reduced the need for strictly face-to-face meetings in many economies studied. Furthermore, some economies with long-haul source markets, such as Chile, are finding it challenging to access the development of this segment. This is a very different situation from Malaysia, which has built its success on its geographical location in Southeast Asia, easily accessible from the leading economic centres of interest.

All economies base the segment on their local development, although there is also growth in the regional market sector, particularly in some economies such as Japan. In terms of threats, geopolitical tensions and global economic downturns are the main critical points for development in almost all economies surveyed.

The development of the meetings industry in the economies has a direct impact on some of the SDGs, with the most notable outcomes being infrastructure development, security measures, education, gender equality and community well-being.

In general, economies support innovation by promoting their regions as business tourism destinations or by building convention centres, expanding infrastructure and creating new jobs to develop more government and international projects. Some economies, such as Japan, have established criteria for certifying their conference venues, and Singapore stands out as one of the leading sustainable business tourism destinations in Asia-Pacific.

Development agencies, bureaus, and ministries are working together to attract the meetings industry to most surveyed economies. In particular, Chile has developed the Ambassadors Programme, which has been very successful in

attracting conventions; the United States is the second leading economy in the world in this sector; Malaysia has been recognised as Asia's preferred destination for business events; and the Philippines, despite its current limitations, was the fastest growing meetings market in Asia in 2016.

In terms of human resource awareness and training in the meetings industry, almost all economies have various business tourism courses, academic journals, professional websites, associations, workshops, exhibitions and government programmes, but formal training is not yet fully developed, especially in the more economically depressed economies. In the case of the Philippines, for example, event training programmes do not conform to international industry standards. As a result of this and other circumstances, there needs to be more specialised human resources in the meetings industry.

Some high-profile events, such as the 2018 FIFA World Cup, have attracted considerable interest from foreign groups in Russia; a similar situation is expected for the United States in 2026.

Linking the meetings industry segment with tourism is one of the key challenges for the economies surveyed. Facilitating travel within each economy and ensuring diverse, inclusive, and accessible tourism experiences are the ways forward. In the case of Peru, the economy is strengthening its meetings industry, which is supported by its gastronomy, culture and history.

Marketing for the meetings industry takes place primarily at the destination and event level. In some economies, such as Russia; the United States or Japan; the meetings industry is a mature and diverse market. In contrast, it is a new and growing sector for other economies, such as Papua New Guinea; The Philippines and Chinese Taipei.

The typical business traveller is between 35 and 45 years old and has a high purchasing power. They tend to stay longer in the destination, either because they work remotely or enjoy days off to explore local tourism products.

Given that these are globally positioned and well-attended business tourism destinations, it is surprising that, except in Singapore, in none of the cases studied, there is an evaluation of ICCA training that actually fulfils the necessary functions to develop the meetings industry. However, some economies, such as Malaysia, offer annual professional certification programmes.

In all the economies studied, there is a growing vision of the business tourism destination, understood from the different territorial levels of approach to the concept, making it easier to structure effective management mechanisms.

11. Potential Guidelines for the Meetings Industry Development in the Asia-Pacific Region

Guidelines	Description and implications	Indicators
<p>Commitment to the strengthening tourism policies by defining the guidelines for the development of the meetings industry in the Asia-Pacific region</p>	<p>There is a need to strengthen the overall vision and medium- and long-term planning of the meetings industry sector for APEC economies. The government agencies of the various economies in the Asia-Pacific region have different perceptions of the meetings industry forecast, which makes it difficult to develop a common strategy, aggravated by the lack of primary methodologies, integrated organisation and coordination, and the definition of specific guidelines. This affects both the public and private sectors.</p> <p>Promoting an attractive legal and fiscal environment is important to attract companies and associations related to the development of the meetings industry. This will contribute to improving the competitiveness of the destination and consequently to creating jobs and economic development.</p>	<ul style="list-style-type: none"> ■ Facilities for migratory entry to participants ■ Customs facilities ■ Tax devices to facilitate the meetings industry ■ Development degree of business tourism observatory
<p>Effective sustainable management, based on the Sustainable Development Goals (SDGs) appropriate to the meetings industry of APEC economies</p>	<p>The Sustainable Development Goals (SDGs) are a universal call to action to end poverty, protect the planet, and improve the lives and prospects of people around the world (UN, 2024). The 2030 Agenda for Sustainability has 17 goals, some of which must be adapted by the meetings industry segment to develop sustainable and responsible consumption of natural resources and the fight against climate change through energy efficiency.</p> <p>It is essential to add sustainable practices as a central axis, promoting green events and minimising the environmental impact of the meetings industry. This could include developing event-specific sustainability policies and plans that focus on reducing waste, using resources efficiently and maximising renewable energy. In addition, the achievement of other goals such as ending poverty, quality education, gender equality, economic growth, strong institutions and partnerships to achieve goals directly and indirectly interfere with the meetings industry.</p> <p>For this purpose, it is advisable to refer to the GSTC MICE Criteria with Performance Indicators and SDGs For Venues, Event Organisers and Events & Exhibitions (Global Sustainable Tourism Council, 2024).</p>	<ul style="list-style-type: none"> ■ Number of SDGs achieved in each economy event

<p>Support the creation of infrastructure and specialised facilities to promote physical and digital connectivity as a structural axis of the meetings industry development in the Asia-Pacific region.</p>	<p>The development of the meetings industry is based on having specific infrastructures and facilities that allow an adequate adaptation to the management of specialized products and processes for meetings.</p> <p>In this regard, prioritising physical connectivity through the creation of strategic alliances that promote air, land, sea and river connectivity, and promoting digital connectivity through technological integration are essential requirements for the proper development of this economic activity.</p> <p>In terms of digital connectivity, it is essential to promote the use of new technologies for event and tourism management to improve user experience and operational efficiency. This would include the implementation of digital event management systems and interactive applications to optimise the the logistics and execution of the meetings industry.</p>	<ul style="list-style-type: none"> ■ Competitiveness in hosting events: venues, facilities and tourist services ■ Annual expenditure on investment in infrastructure and specialized meeting's equipment ■ Number of strategic alliances focused on promoting physical and/ or digital connectivity ■ Number of identified events with digital event management systems
<p>Exploiting the tourism resources of APEC economies by optimising their use as a combined product of the meetings industry segment</p>	<p>Today, the Asia-Pacific region has excellent prospects for the development of the meetings industry, thanks to the diversity of its natural and cultural heritage, and the attractive services it offers. The abundance of tourist resources with which to weave a network in this sector, make the region aspire to be a leader, enhancing its identity as a business tourism destination and positioning itself correctly in the market to face the immediate future with guarantees. APEC economies have tourism products that can be valued, offering unique, memorable, and safe experiences.</p>	<ul style="list-style-type: none"> ■ Number of tourism products linked to the meetings industry offer ■ Number of business tourism service providers



<p>Understanding the demand and segmentation of the meetings industry market in APEC economies</p>	<p>Tourism demand is at the heart of any tourism development and destination planning process. All tourism development processes and initiatives have to meet the most diverse needs of demand and therefore require an adequate knowledge of its characteristics, both the current demand coming to the destination, and the potential to be attracted.</p> <p>Every tourist is different; they are attracted by the specific characteristics of the market and have their own needs. However, although business travellers are different, some are similar and have similar characteristics, needs and expectations. For this reason, it is so essential to offer unique and innovative experiences to business travellers, as they are the best marketing tool to properly communicate the destination and its related tourism products to other potential consumers.</p>	<ul style="list-style-type: none"> ■ Number of participant arrivals at events ■ Visitors typology and profile ■ Business visitor expenditure at the destination
<p>Improving the promotion, marketing and attraction of the meetings industry segment as an extension of a destination's tourism development process.</p>	<p>Improving tourism activity at the APEC economies means finding new formulas for revenue generation, destination marketing and product aggregation to avoid a fragmentation of supply. Adequate marketing of specialized products is essential for APEC tourism management to be profitable.</p> <p>Similarly, in line with the recommendations of the UNWTO Global Report on the Meetings Industry, it is essential to review the financing model of the Destination Marketing Offices, and to promote efficiency and speed in decision-making, making use of new technologies, smart campaigns and social networks; adopt a multi-channel strategy with messages adapted to each sector of the industry, avoiding bureaucratic aspects that end hampering strategies aimed at meeting the new needs of the business customer and promoting the development of destination brands for meeting destinations that are not easily imitated by the competition, can be widely reused for many markets and contribute to the benefits obtained by the end consumer.</p>	<ul style="list-style-type: none"> ■ Number of consolidated events of domestic and international significance ■ Number of promotion and marketing programs developed by each economy ■ Impact on the economy brand due to the meetings industry

Raising awareness- and educating about the meetings industry as a strategic segment for Asia-Pacific socio-economic development.

Social development is not sufficiently considered and is not seen as a factor that can be supported in the planning and management of the meetings industry.

It is necessary to have the support and involvement of the local population in the planning processes of the meetings industry development, so that they feel part of it and see their ideas, needs and expectations represented as general lines that will guide the tourism development of the destination and feel it as their own, in addition to appreciating the legacy and long-term benefits that the activity generates in the host communities, such as increase in tourism, infrastructure development, economic development, growth in sports, cultural, and academic participation, among others.

It is also important to promote the implementation of training and professional development programmes in the meetings industry management, for professionals in the sector in the APEC region, as Business events serve as catalysts for knowledge transfer, innovation, networking, and skills development, all of which are essential for advancing the knowledge economy in a society.

These programmes could focus on improving skills in event management, sustainability, and tourism-related technologies to strengthen local capacity and foster employment in the tourism sector.

Accreditation and certification must be guaranteed by the highest regional, domestic and academic authorities that leading business tourism management in this knowledge transfer system.

- Number of regulated training programs on business tourism
- Number of graduates of business tourism training programs

<p>Strengthening and intensifying regional cooperation, intersectoral articulation and associativity between the public and private sectors as a strategy for the development of optimal productive synergies</p>	<p>Public administrations are responsible for economic development in their areas of competence and the tourism sector is increasingly emerging as a strategic sector for the economic development of countless regions and economies.</p> <p>In this sense, they must be able to establish formulas for cooperation between the various actors involved in the meetings industry, taking into account its crosscutting nature. They must also ensure their involvement at all levels of government (domestic, regional and local).</p> <p>For this reason, it is essential to lead development processes by bringing together the interests of the living forces of the territory, so that it is assumed as a strategy for social and economic development, in the different APEC economies, promoting intersectoral articulation.</p> <p>It is also proposed to encourage the creation of cross-border alliances for the promotion of business tourism destinations and the exchange of best practices, promoting bilateral or multilateral agreements that facilitate the exchange and management of information. Within this framework, it is proposed to prioritise the exchange of research, knowledge and relevant practices in the management of the meetings industry and to identify and prioritise regulations aimed at the facilitating and developing this segment.</p>	<ul style="list-style-type: none"> ■ Direct economic impact ■ Temporary employment generated by the event ■ Fulfilment of milestones in the strengthening of the organizational system ■ Economy's event numbers of meetings of the Permanent Joint Multisectoral Commission
<p>Strengthening the safety and security of business tourism destinations.</p>	<p>It is essential to provide facilities and safety measures for tourists, organisers, suppliers and participants of events related to business tourism and to implement safety management strategies in tourist destinations, before, during and after the holding of an event, taking into account fundamental aspects such as prevention and risk management through the development and effective implementation of crisis management plans.</p> <p>Similarly, it is important to note that OPCs and DMCs are required to maintain specific insurance policies in relation to the type of service they provide. It is therefore essential to track compliance and coverage of this aspect in order to guarantee the safety and protection of all the actors involved in the management of events related to tourism activities.</p>	<ul style="list-style-type: none"> ■ Number of penalties applied as a result of business tourism ■ Degree of satisfaction of business visitors at destination



12. Conclusions

In the meetings industry segment, the 11 economies studied are developed at different paces, given the different dimensions of each economy and the markedly uneven quality of their specialized infrastructures and facilities.

12.1. Conclusions based on quantitative information

1st Conclusion: Information on the economic contribution of business travel, visitor arrivals, visitor stays, and tourist expenditure are basic indicators that should be collected in a business tourism observatory.

2nd Conclusion: In terms of tourism infrastructure for business tourism destinations, the organisation responsible for managing the destination should assume functional responsibility for control and supervision to define the type of hotel services offered.

3rd Conclusion: Regarding the indicators corresponding to national and international events, diversifying the destination's activities and events is essential to de-seasonal demand and increase the number of visitors in the low season.

4th Conclusion: In terms of the number of specialized infrastructure and facilities, the focus should be on versatile infrastructure and facilities with specialised services and advanced technology that can be used in a variety of ways to ensure investment.

5th Conclusion: Regarding the number of venues and infrastructure for sports and multipurpose events, suitable venues and a wide range of tourism services, together with their proper management, are essential to attract events. A destination with adequate infrastructure and solid institutional support will be a thriving business tourism destination for promoting domestic and international events.

6th Conclusion: Regarding the number of PCOs or event production companies, it is important to stress that they are the driving forces behind the development of the meetings industry tourism. Their formal coordination with public and private entities is a fundamental aspect that should always be considered.

7th Conclusion: Regarding the number of DMCs, it is important to note that local travel integrator agencies are essential for a destination. However, public institutions should also monitor the design, management and coordination of business events and corporate travel.

8th Conclusion: As the number of convention bureaus increases, technical assistance is needed to help attract and promote events in the destination, whether private, public or mixed initiatives. The bureaus should coordinate and centralise all initiatives for integrated management, coordinating public and private efforts.

9th Conclusion: In terms of the number of partnerships with the meetings industry capacity, it is emphasised that public-private partnerships should be directly linked to PCOs and public institutions in each business tourism destination.

10th Conclusion: Regarding the number of programmes with business tourism academic teaching, it is important to highlight that many aspects directly affect the meetings industry and should be improved by establishing formal education and training.

11th Conclusion: Regarding the number of accredited CICE agents or companies, it is crucial to consider that the International Convention Executive Certificate (CICE) proposed by ICCA should be a component that public institutions of business tourism destinations should evaluate to standardise working processes.

12.2 Conclusions based on qualitative information

1st Conclusion: The global trend towards participation in the meetings industry offers an opportunity to attract visitors. Proper event planning can attract visitors in the off-seasons, de-seasonalising tourism in any economy. However, global economic uncertainty poses a threat to event planning.

2nd Conclusion: Adequate coordination and communication between the different players involved in the planning and development of the meetings industry (event organisers, public administrations, tourism businesses and the local population) is essential in order to exploit the synergies between organisers, activity promotion and tourism.

3rd Conclusion: Regarding the development of the meetings industry segment in economies, the creation of a system of indicators is essential to ensure a correct assessment of the impact generated by business tourism. It provides crucial information for strategic decision-making. This system results in a well-designed information-gathering mechanism capable of self-sufficiently obtaining all the information necessary to assess the impact of the meetings industry segment on an economy. As a result, any severe shortcomings are detected, and appropriate corrections are planned.

4th Conclusion: The growth of the meetings industry means that it should be considered a priority, not only in tourism policies but also in any territorial policy, as it is a cross-cutting sector involving different areas. Policies that should be implemented, along with the collection of standardised data through a system

of indicators, include the exchange of best practices, the development of talent with sustainability initiatives, the development of accessibility standards to promote inclusive tourism with appropriate regulations, as well as visa facilitation to facilitate the development of the meetings industry in all APEC economies.

5th Conclusion: Education and awareness of sustainability in the meetings industry, in compliance with the 17 SDGs, are crucial to encourage stakeholders to integrate these sustainable principles into their event planning and participation.

6th Conclusion: The development of the meetings industry is a multiplier for local economies, and public investment in specialized infrastructure and facilities has a high rate of return.

7th Conclusion: For the tourism product linked to the meetings industry segment, customer satisfaction is closely related to the quality of their experience and also to the quality of the 'total tourist service of the destination'. The main obstacle lies in the adaptation of the organiser to link the two lines: event and tourism.

8th Conclusion: In terms of the business tourist profile, this is a visitor with high spending power, so local efforts must be made to create experiences that complement the event and help increase visitor spending in the destination.

9th Conclusion: Regarding the promotion and marketing of the meetings industry, it is essential to study the impact on the brand image of an economy. This could be done through surveys and data analysis of how the perception of the business tourism destination changes among potential visitors before and after the events.

10th Conclusion: Regarding awareness-raising activities for the meetings industry, the general public and a large part of the business sector are unaware of its importance as a complementary sector of considerable interest for the projection of an economy. The local and regional populations should be encouraged to develop attitudes and participate directly or indirectly in these events to have a greater impact on tourism activities.

11th Conclusion: In terms of business tourism training, adequately trained professional teams are needed to enable effective management of the meetings industry, which will positively impact the promotion of the local destination and its socio-economic development.

12th Conclusion: In terms of public-private coordination for the development of the meetings industry, cooperation between different approaches institutionally strengthens all actors involved. This allows for sustainable development, fostering the participation of local communities and synergy between public and private actors for balanced and beneficial growth.

13th Conclusion: It is necessary to recognise the importance of providing customs facilities as a legislative tool that allows the streamlining and facilitation of customs procedures and the entry of participants for local events with international participants, as is the case of Peru.

The meetings industry development is emerging as a dynamic intersection of different development approaches. These approaches need to be based on open innovation and endogenous growth, fostering collaboration and sustainability. Active cooperation between local agents, academic institutions and government actors promotes equitable and prosperous meetings industry management.

In summary, these collective findings confirm that successful and sustainable tourism management of the meetings industry segment in APEC economies results from a unified approach and the harmonious fusion of diverse perspectives and collaborations. This synergy forges the path towards holistic and effective management and a future where the meetings industry development thrives in balance.

13. Recommendations

The analysis of the current situation of the meetings industry development in the APEC economies studied shows that there is still a long way to go in terms of information and specific data on the meetings industry segment to ensure its sustainability, as well as that of the resources and services that they make it up. The 11 examples analysed present a similar problem; each has associated destination and resource management formulas with noticeable differences but whose objective is to provide solutions to similar challenges of tourism development and profitability.

1. Land development as a result of the meetings industry

The land is seen as an essential complement to the organisation and development of the meetings industry. The overlapping of a thematic tourism layer around events has the advantage that the relationship between the land's potential and the promoters' mentality is largely very favourable in structure and predisposition. Some of the key aspects to be worked on are as follows:

- ◊ The development of the meetings industry requires a specific risk of experimentation. The starting point is its integration into the city's development plans, based on "horizontal" cooperation that brings together local public and private actors. In the context of highly fragmented realities, it is difficult for an overall vision to emerge from an initial analysis, even if the various interests and perceptions can be brought together.
- ◊ In this way, actions should be planned at the local and regional levels without sacrificing the possibility of considering all the processes and needs arising from the development of tourism.
- ◊ Each economy should constitute an essential part of the annual strategic planning, clearly reflected in its budget line.
- ◊ The approach to the meetings industry must be able to combine the potential of its tourism resources with the leisure of these event experiences in such a way as to benefit from new avenues of socio-economic impact.

- ◊ The success or failure of developing the meetings industry for local economies will depend on the structure of the interests and relationships between stakeholders, i.e., the collective capacity to observe the local reality, articulate priorities and agree on the organisation of available resources.
- ◊ There is a need to promote a specific network of intersectoral cooperation that contributes to the development of sufficient concurrence to enable a structured parallel leisure offer to be organised.

2. APEC's Competitive Position and Growth of the Meetings Industry Segment

The success of the meetings industry development must be measured in terms of the socio-economic impact it can generate in the region. APEC economies need to develop strategies and policies to continue creating areas of economic dynamism and differentiated products and experiences for visitors. Some of the key aspects to work on would be the following:

- ◊ The development of events must be approached from a flexible and efficient structure capable of combining the needs of organisers with those of public and private bodies. This synergy is an indispensable element for the successful completion of the components related to the economic, social and cultural impact of the meetings industry segment.
- ◊ A scenario must be created in which the leading promoters in each economy can share their knowledge and know-how in organising events. This will enable them to develop differentiated proposals, organise relevant training courses and create the necessary conditions for a new valorisation of this know-how. In this way, many local services and products can be reintroduced at each event.
- ◊ In order for the meetings industry to benefit society, it is imperative to develop a Business Tourism Observatory. This will make it possible to standardise the information on this segment while creating and promoting an original, innovative, and attractive structured offer. It is not enough to have a specialized infrastructure and equipment; it is necessary to have standardised information in order to transmit the ambitious communication objectives of each destination in each economy, exceed expectations and achieve complete satisfaction of the visitor.

- Customer satisfaction is closely linked to the quality of their event experience and the quality of the destination's "total tourism service". The main obstacle is for the organiser to adapt and reconcile both lines: event and tourism.
- In most cases, the involvement of event organisers is often limited to organising the competition itself and proposing a few simple leisure experiences. There needs to be more activities and innovative leisure proposals to increase the economic impact of each destination.
- A key factor that contributes to the competitiveness of a business tourism destination and one that APEC economies should address, given the high value placed on it by international corporations and professional associations, is security management and crisis response capabilities. To adequately address these issues, governments need to establish clear and compelling security and crisis management protocols, which will significantly contribute to the destination's competitiveness and attractiveness in the global the meetings market.

3. Strategic Management and Governance

The term governance has several meanings, one of which is worth highlighting: it refers to the management of "public affairs" through the interaction of public administrations with the private sector (companies, organisations, etc.). In addition to promoting effectiveness and efficiency, governance seeks to give legitimacy and sustainability to the actions proposed by public entities through participation, transparency, and accountability, as well as by encouraging the support and commitment of private sector actors. Some of the critical aspects to be worked on would be the following:

- ◇ Regions, economies and cities compete to attract the interest of event organisers because of the undeniable benefits they bring to the economy. Meetings destination planning must create a framework for communication and exchange that allows stakeholders to express their knowledge, expectations, conflicts, and capacity for collective actions and organise around new ideas.

- ◇ The meetings industry has a significant direct and indirect economic impact on a destination. However, this can be greater if event organisers are actively involved and willing to work with tourism professionals to create a supply that meets demand. The challenge is not to attract more participants to each event but rather to develop their loyalty or to capitalise on their stay with parallel tourism programmes that can have a significant impact on each destination.
- ◇ Stable public-private partnerships must be established as the only means of ensuring the maintenance or creation of domestic and international events that can deseasonalise demand in destinations.
- ◇ In short, the current challenge is to make the meetings industry as profitable as possible in social and economic terms. To achieve this, the public and private entities responsible for each economy must have a broader vision, understand its integration within a destination, and assume coordination protocols between all the destination's management entities.
- ◇ On the other hand, the only way to develop a business tourism destination in a controlled manner and within the channels of prior planning is to have a management entity capable of leading the other actors involved in the development processes. In this context, specialized infrastructures and facilities must be integrated into a broader process and contribute their point of view and needs. Well-managed and organised, the meetings industry can make the value of the destination's resources economically profitable and generate opportunities for the local population towards a more comprehensive vision of the tourism industry in a destination.

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ЧТО ДАЛЬШЕ

Игорь
Смирнов
Губернатор
Москвы
и
Генеральный директор
Сбербанка России

Кирилл
Царев
Сбербанк

Саиф Хумайд
Аль Дахери
Центральный банк ОАЭ

Ольга
Скоробогатова
Банк России



15. Annexes

SURVEY: MICE TOURISM REPORT ON APEC ECONOMIES

REQUIRED INFORMATION

MICE TOURISM REPORT ON APEC ECONOMIES

Peru has been selected to host the Asia-Pacific Economic Cooperation (APEC) in 2024. Peru's commitment as a volunteer for the activity "Identify the potential of thematic travel and tourism corridors such as sports tourism, MICE tourism (Meetings, Incentive Travel, Conferences/Conventions, and Events/Exhibitions), quality tourism, etc." of the Priority Area 3: Travel Facilitation and Competitiveness of the 2020-2024 TSP. In this context, the Ministry of Foreign Trade and Tourism of Peru (MINCETUR) has committed to prepare the report "Identification and Analysis for Potential Guidelines for the Development of MICE Tourism in the Asia-Pacific Region", linked to the Institutional Operational Plan: OEI 05: Promote the development of a sustainable supply of the tourism sector; AEI 5.2: Specialised tourism products; Goal 17: Training and technical assistance aimed at the development and management of tourist destinations; and, activity N°002: Strengthening of tourism products - specialised segments: MICE.

This document explores and analyses the development and potential of this segment in APEC economies. To this end, MINCETUR is collecting and analysing available information on MICE tourism in the 21 APEC economies. The report will target tourism professionals, officials and decision-makers from APEC economies, and relevant stakeholders in the tourism sector.

Reporting on this segment is relevant because MICE tourism has direct, indirect and induced economic impacts. It helps regulate the seasonality of tourism demand, improves the quality of services the tourism industry provides, attracts tourists who might not have travelled for any other reason, and promotes investment, trade and technological development¹.

This segment represents approximately 20% of international arrivals worldwide and is characterised by sustained growth rates and high profitability. It also contributes to the development of other related sectors. It also has a significant impact on the environment and local communities, as companies organise events and exhibitions to promote the local region and market their

1 UNWTO (2006).

products². In fact, in 2019, the business events industry was driving global GDP with USD1.5 billion and 26 million jobs³, and its post-pandemic development is achieving exponential growth.

According to the report of the Strategic Information Portal of the Meetings Industry in Latin America (PEIIR)⁴, the meetings industry reports a year-end 2023 with an increase of 9.4% over the same period last year.

The information to be included in this report will cover data on statistics, market trends, policies, sustainability plans, risk management programmes, MICE infrastructure and facilities, complementary tourism products to the MICE tourism offer, associative and corporate market segments, marketing and awareness strategies and, finally, productive synergies between the public and private sectors for the MICE segment. In this regard, each economy will prepare and submit the requested information according to its reality and management, which will be turned into a case study in this report.

Peru, through MINCETUR, will be responsible for editing and organising the content of this report. Each economy will be responsible for the accuracy of the information, terminology, grammar, typography and wording. MICE tourism content will be collected and submitted using the Peru-designed template.

To define the scope of MICE tourism activities, please refer to the following definitions⁵:

Bidding Book: a document that contains a mapping of the MICE segment, detailing the calendar of events and air connectivity, among others.

Capacity: the capacity of a space expressed by the number of people in the space according to the different formats.

Congress: a periodic meeting attended by an association, organisation or entity members to discuss previously established issues.

Conference: an event organisations use to exchange views, communicate messages, debate or promote a topic or point of view.

2 Global Sustainable Tourism Council (2024). GSTC MICE Criteria. Version 1.0. Performance Indicators and SDGs For Venues, Event Organizers, and Events & Exhibitions. <https://www.gstccouncil.org/gstc-criteria/>

[gstc-mice-criteria-for%20events-exhibitions/](https://www.gstccouncil.org/gstc-criteria/gstc-mice-criteria-for%20events-exhibitions/)

3 ICCA (2019). Growth is imminent in the Asian - Pacific association space. <https://www.iccaworld.org/articles/post/growth-is-imminent-in-the-asian-pacific-association-space/>.

4 PEIIR (2024) Meetings Industry in Latin America and Mexico: perceptions and expectations. Newsletter N° 48.

5 UNWTO (2024). Glossary of tourism terms. <https://www.unwto.org/es/glosario-terminos-turisticos>.

Punto MICE (2024). MICE Glossary. <https://puntomice.com/glosario-mice/>

Convention: a formal and generic event organised by an association to provide information about a particular situation and then to deliberate and reach consensus among its participants.

Convention and visitors' office: Organisations that promote cities, regions or economies as attractive destinations for events and meetings. They can provide information on venues, facilities, and activities that are available to attract MICE events.

Convention Bureau: Entity that develops a set of strategic actions to facilitate the attraction of meetings and events to a destination. They may be exclusively public capital, mixed (public capital and contributions from local partners) or only private (financed by their partners).

Convention Centre: This is infrastructure specially designed to host different types of events, ranging from trade fairs to congresses, including corporate conventions, product launches, meetings, and cultural and musical events.

Digital connectivity: The ability to connect and communicate between devices, people or systems through digital technology channels.

DMC: Destination Manager Company. A local company offering creative itineraries and exemplary operational logistics management with extensive knowledge of incentive travel. They usually specialise in local knowledge and offer touristic and non-touristic services and products. They are distinguished from local operators by their specialisation and ability to provide all kinds of event solutions beyond the purely touristic.

Event Attraction: Refers to activities that attract an event to a specific venue, space or destination. This activity is coordinated between the suppliers, the organisations involved (whether public or private), and the convention bureau of an economy or city to ensure that a meeting, trade fair, congress, incentive trip, corporate convention, or event is ultimately held in the place it is bidding for.

Event organiser: The company in charge of organising the meeting or venue rental, publicising the event, inviting participants, organising presentations, etc.

Fair and exhibition: An event where products and services are exhibited and promoted to members or guests of a particular industry.

Fam Trip: A visit to a destination offered to travel agents and organisers of MICE events to show them what they can offer their clients.

Host: The company or institution that had the initiative to organise the meeting or event.

Incentive event: An award event or incentive trip that focuses on recognising people who have met or exceeded set goals. The participants are rewarded for their excellent performance and receive a travel experience.

MICE tourism: A type of tourism activity in which visitors travel for a specific professional and business reason to a location outside their place of work and residence to attend a meeting, activity or event. The main components of business tourism are conferences, conventions, congresses, incentives, trade fairs and meetings.

MICE tourism destination: A specific geographical area, with its infrastructure and services and the administrative capacity to host conferences, conventions, congresses, incentives, trade fairs and local and international meetings.

Meetings: Diverse cultural, social, political, sporting or religious events (such as concerts, masses, championships, rallies, award ceremonies, etc.). It also includes international governmental meetings such as the OAS and UNESCO.

Networking: Professional contacts made in a particular situation or event.

Participants: People who attend meetings, either as delegates or exhibitors.

PCO: Professional conference organiser. This company or professional is dedicated to organising and planning all types of events.

Physical connectivity: Part of the basic infrastructure necessary for economies to safely and efficiently transport local and international tourists.

Press trip: A site visit offered to journalists to inform them about the offer they can include in their content.

Site Inspection: A visit to an infrastructure (conference centre, convention centre, hotel, event space) with the aim of getting to know in detail what can be done there.

Suppliers of other goods and services: Food, transportation, accommodation, tourism services, and meeting equipment rental services, among others.

Tourism product club: A management and planning tool through which a group of companies and organisations agree to work together in an organised way to develop new products or enhance the value of existing products for a specific market segment within a framework of public-private cooperation.

Venues: Spaces where it is possible to organise a MICE event.

Workshop: A commercial presentation held during a congress, where different organisations or private companies offer services through stands and audiovisual equipment.

Complete all fields and return to the nomination focal point below before April 09, 2024:

Ms. Paola Jimenez Bielich

Tourism Specialist.

- ◇ Below is a template for considering specific and official information for the last three years (2021, 2022, 2023) to be included in this report. In addition, each aspect has more detailed questions to provide the information.
- ◇ It is suggested that tables show the statistical information and a text to explain the main trends. Tables should be in Word or Excel and should never be sent as images.
- ◇ For monetary figures, consider expressing them in US dollars.
- ◇ Remember to cite all references in APA format for inclusion in the bibliography of this report.



MICE TOURISM REPORT IN APEC ECONOMIES

NAME OF ECONOMY:

1. Quantitative information on MICE tourism in APEC economies.

- a. MICE travel contribution is the direct contribution of MICE tourism to the economy.
- b. International business tourist arrivals are the number of tourists travelling on business to an economy other than the one in which they usually reside for a period not exceeding 12 months.
- c. Stay and MICE inbound tourism expenditure refers to the number of nights spent in the destination and the tourism expenditure of a non-resident MICE visitor within the economy of reference during their stay for the event, fair or incentive trip.
- d. Stays and domestic MICE tourism expenditure refers to the number of nights spent in the destination and tourism expenditure by a resident MICE visitor in the destination economy.
- e. A tourist plant with more than 4* in the three main MICE destinations has the maximum capacity to accommodate travellers in accommodations of outstanding category in the main MICE destinations (2 or 3) of each destination economy.
- f. The number of events of an international character held and the meeting category are conferences, conventions, congresses, incentives, trade fairs, and meetings organised by the private sector, with international attendees (>20%) from the destination economy.
- g. Number of local events and meeting categories: conferences, conventions, congresses, incentives, trade fairs and meetings organised by the private sector, with domestic attendees (>80%) from the destination economy.
- h. The number of MICE infrastructure and facilities. These are exhibition centres, convention centres, venues and hotels with rooms for meetings with more than 200 participants.
- i. The number of venues and specialised infrastructure for sports and multipurpose events, i.e. facilities, stadiums, and equipment that provide sports services to a given community and allow for event spaces.
- j. A number of PCOs (Professional Congress Organisers) and event production companies are private entities that advise the institutions organising the event and then plan all its aspects to make it a success.
- k. DMCs (Destination Manager Companies) are local companies with specialised itineraries and extensive knowledge of incentive travel; they

provide tourism and non-tourism services and products.

- l. The number of structures promoting the destination: Convention Bureaus, which are public, private or mixed entities that facilitate the destination, are ideal places to host professional events within the destination economy.
- m. A number of associations with MICE capacity, such as professional associations, companies, universities, ministries, or entities in general, have managed to organise meetings with more than 200 participants in the last three years.
- n. Public or private schools or universities offer a number of academic training programmes for MICE professionalisation, each offering at least 90 hours of training.
- o. Number of agents/companies holding the Certified International Convention Executive (CICE), the only globally recognised certification for suppliers in all sectors of the meetings industry offered by ICCASkills.
- p. MICE tourism products are combined products created explicitly by public and private tourism agencies for MICE travellers within the destination economy.

2. Qualitative information on MICE tourism in APEC economies

- a. Briefly describe the main strengths, weaknesses, opportunities and threats (SWOT) for the MICE segment in your economy.
- b. Briefly describe what guidelines are appropriate to the development of MICE tourism in APEC economies.

2.1. Tourism policies

- a. Briefly describe how MICE has developed in the last 20 years:

Is there a strategic plan for MICE tourism in your economy? If so, what are its main guidelines? What have been the top 3 or 5 milestones of this MICE tourism segment in your economy? What are the major MICE meetings currently taking place in your economy? (Mention at least 3 MICE meetings).
- b. Key policies, regulations or standards: Briefly describe the most relevant policies, regulations or standards approved by public institutions that have supported the development of MICE tourism.

What were the results of the implementation of these policies, regulations or standards? (Mention 2 or 3) What significant changes have driven these policies, regulations or standards? (Mention 2 or 3).
- c. Government policies on MICE infrastructure: Briefly describe the policies for developing MICE infrastructure and facilities within the economy.

2.2. Sustainable Development Goals

Briefly describe how the 17 Sustainable Development Goals are met in the MICE segment within your economy, taking into account the following points: Sustainability policy and plan according to the Sustainable Development Goals, contingency plans, etc.

2.3. Infrastructure and Facilities

Briefly describe the main MICE infrastructure and facilities in the economy. What are the minimum criteria or characteristics considered for the development of infrastructure public investment projects for MICE tourism?

2.4. Combined tourism product

Briefly describe the combined tourism products marketed to the MICE segment.

- ◊ What are the main tourism products (2 or 3) marketed to MICE destinations (2 or 3 destinations) in your economy?
- ◊ What activity, itinerary or route is most frequently undertaken by MICE tourists on a complimentary basis?
- ◊ Does your economy have a MICE tourism product club? If yes, what does it consist of?

2.5. Demand and segmentation

Briefly describe the profile of the MICE traveller within your economy.

- ◊ What is the origin, age and gender of MICE tourists within your economy?
- ◊ How many nights does a MICE traveller typically stay in your destination?
- ◊ What is the typical frequency of MICE tourists in your destination?
- ◊ How are MICE traveller visits distributed over the year?
- ◊ In addition to your primary MICE motivation, what tourism activity/resource/tourism product is most in demand by MICE travellers in your economy?

2.6. Promotion and Marketing

How are MICE meetings promoted and marketed in your economy?

- ◊ Briefly describe whether convention bureaus in your economy are solely publicly owned, mixed (with public capital and contributions from local business partners) or solely private (funded by their partners) and describe your appreciation/recommendations regarding this type of management.
- ◊ Do you have policies encouraging the creation and management of convention bureaus?

- ◇ Briefly describe how you manage the attraction of meetings, incentive travel and domestic and international events.

2.7. Awareness raising and training

- ◇ Briefly describe how MICE awareness activities are carried out in your economy.
- ◇ Are there any government training and professionalisation programmes for human resources in MICE tourism? If so, what do they consist of?

2.8. Public and private sector

Briefly describe how coordination is established between government entities, tourism companies and agents in the MICE segment

- ◇ Does the public sector organise coordination meetings between the private and public sectors? If so, who are the participants, and how often do they meet?
- ◇ Who are the main sponsors of MICE events within the destination reference?
- ◇ What institutional tools are used to articulate MICE tourism with the policies of other economic sectors within your economy?

NOTE: To make the content livelier, each economy should provide about 3 high quality photographs (300 dpi in JPG or TIFF format and horizontal orientation) for each content section according to the template. For example: MICE infrastructures and equipment, Crowd events. Each image, illustration, table or graphic must be accompanied by its respective title, caption, reference source and image credits correctly. Emblems, flags or maps are not accepted, in order to comply with APEC nomenclature.

Please upload the photos to the corresponding economics folder at the following link:

<https://drive.google.com/drive/folders/1pG0OZ6vrthmzIN6HzIDPsrC3wSHNxDqt>