

**AN INVESTIGATION INTO THE POTENTIAL TO ATTRACT ADDITIONAL
BUSINESS TOURISM TO THE MIDWEST REGION THROUGH THE
DEVELOPMENT OF PROFESSIONAL ASSOCIATION AND ACADEMIC
CONFERENCES.**

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Abstract

Meetings and conferences are the fastest growing segments of the business tourism area (Oh et al., 2008; Bernini, 2007; Zhang & Qu, 2006; Weber, 2000; Oppermann & Chon, 1997). Indecon (2008) reported that the expenditure of international conference delegates was worth around €200 million to the Irish economy. Both Tourism Ireland and Fáilte Ireland have recently revised their business tourism websites aimed specifically at the meetings, incentives, conferences and exhibitions market (MICE). Conference and Incentive Travel newsletter of November 2009 reported that 'Ireland plans to invest close to one million pounds in promoting its business tourism offer in 2010, with 30 percent of it's spend targeting the association market' (Wyatt, 2009). This spend is up 20 percent on the 2009 budget indicating the realisation of the importance of the business tourism market. In 2007, the Shannon region hosted 12 percent of the total number of international association meetings held in Ireland (Indecon, 2008). This is the second highest regional share after Dublin. Association conferences unlike corporate conferences tend to rotate between destinations making them an invaluable opportunity to the Midwest region.

The project aims to investigate the potential to attract additional business tourism to the region through the development of professional association and academic conferences. The research involves a demand and supply side analysis, including an audit of associations which the Midwest region has the capacity to attract as well as an appraisal of the region as a business tourism destination. LIT is used as a case example to highlight the potential access to additional business tourism in the region through staff membership of associations and their willingness to act as conference ambassadors for the region.

Introduction

This paper is part of a larger investigation into the potential to attract additional business tourism to the Midwest region through the development of professional association and academic conferences. As part of the literature review the following areas were examined; the meetings and conferences industry in general, advantages of conferences to host destinations, Irish meetings market development and the Midwest as a conference destination. As a result of this review it was possible to identify the gaps in the existing literature and try to resolve the deficit in the research that has been carried out previously.

The meetings and conventions industry has been growing steadily since its establishment in the 1800's. In the USA 'the Writing Paper Manufacturers Association and the National Education Association were reportedly meeting prior to the civil war' (Ford & Peeper, 2006: 1105). From this time there has been continual development in this sector resulting in the prevalence of convention centres, convention visitor bureaus and venues competing for the lucrative business of meetings and conventions. The industry has shown itself to be the fastest growing segment in the tourism industry (Oh et al., 2009; Bernini, 2007; Zhang & Qu, 2006; Weber, 2000; Oppermann & Chon, 1997).

There are some main players in the meetings and conference industry, namely, the US and Europe with the Asia-Pacific region now capturing some of the North American and European share of the market (Commonwealth of Tourism, 2005 cited in Weber, 2000). Emerging markets are slowly eroding Europe's hold on the meetings market but in saying that, recent figures from ICCA (International Congress and Convention Association) show that Europe still has a firm hold on the international association meetings market with a 55.4% share. However, new venues and destinations are attempting to compete for some of this share, just one example is Bahrain's announcement of plans in 2009 for the development of a new Expo City which will increase its existing Bahrain International Exhibition and Convention Centre (BIECC) tenfold (Davidson, 2009). This story is repeated worldwide. Davidson (2009) in his report for EIBTM (Exhibition for the Incentive Business Travel and Meetings) also refers to the BRIC economies (Brazil, Russia, India and China) as being areas to observe with regard to emerging markets. The British Associations of Conference Destinations' (2008) reported a decline in the conference market between 2005 and 2007 which may substantiate the role of emerging markets in eroding the growth of the meeting and convention market in Europe (BACD, 2008).

Meetings and Conferences

As we have seen the meetings and conference market is a rapidly expanding area nationally and internationally. Hanley notes that the service sector in the

majority of developed economies is the 'pre-eminent driver of economic performance and the largest contributor to employment levels' (2008:1). With this in mind, business tourism and more crucially meetings and conferences are an important area of this service sector to investigate and gain an understanding of. What is a meeting in the context of this area of tourism and who are the stakeholders involved in the area? To begin meetings can be defined as:

An organised event which brings people together to discuss a topic of shared interest. The purpose of the meeting may be commercial or non-commercial: the meeting may be attended by six or many hundreds; it may last from a few hours to a week. But the essential characteristic which makes a meeting qualify as part of business tourism is that it engages some of the services of the tourism industry, and this usually means being held away from the premises of the organisation running it (Davison, 1994:21).

Rogers defines 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. [*sic*]. Can be on an ad hoc basis or according to a set pattern' (Rogers, 1998:17).

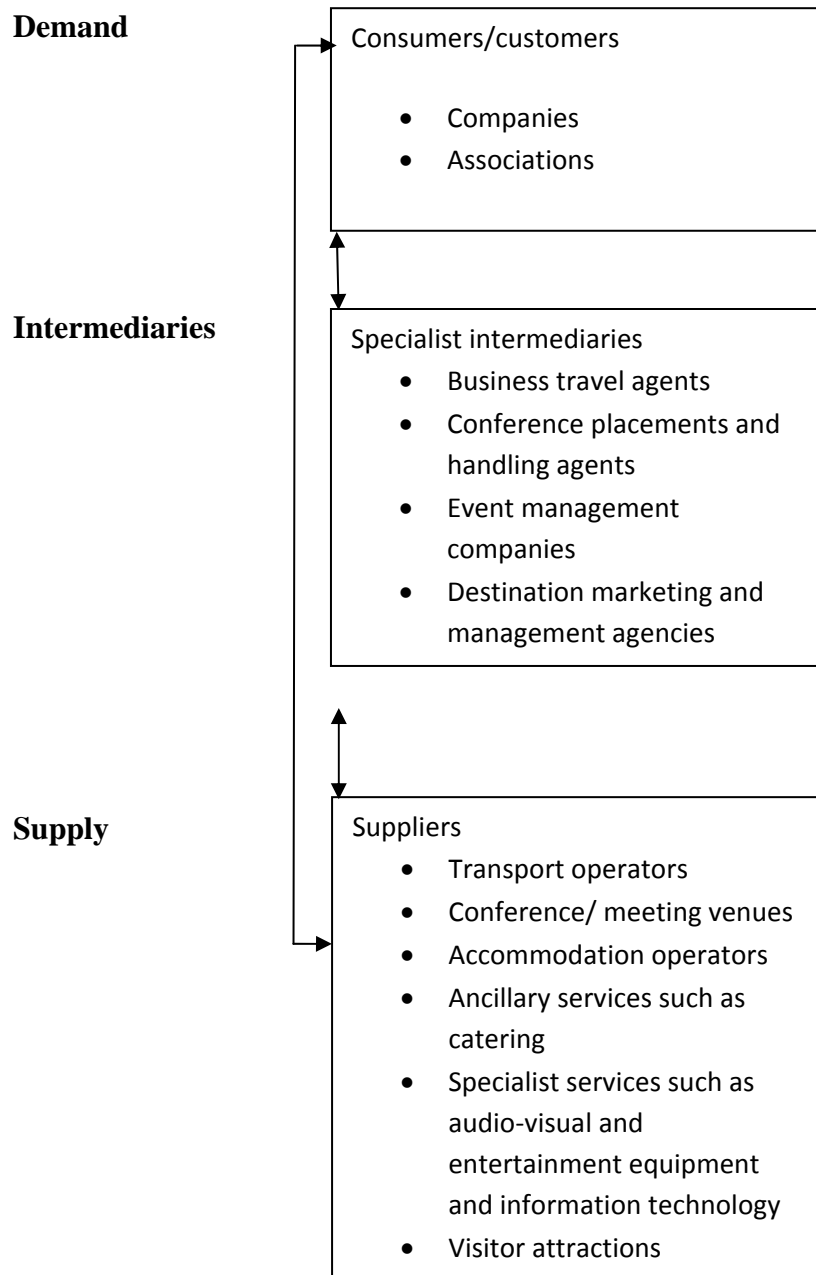
There are many terms used interchangeably throughout the meetings industry which can lead to confusion. The meetings, conferences and exhibitions industry in the USA has attempted to deal with this issue by producing a glossary through APEX (Accepted Practices Exchange) which has been made available on the Convention Industry Council website (www.conventionindustry.org/glossary) to define industry related terms. Geography can dictate the various terms used to describe meetings. 'A small gathering is a meeting but a large meeting is usually called a conference in the UK, a convention in the USA and a congress in much of mainland Europe' (Swarbrooke & Horner, 2001: 5). Globalisation of the industry has led

to use of American terminology within Europe and the UK (for example The Dublin Convention Centre). For the purposes of this research, the UK terminology of meetings and conferences will be used.

Meetings are part of the larger area of business travel which includes incentive travel, exhibitions, reunions, training courses and product launches which can all be held singularly or with meetings as an element of them. This segment of tourism is recognised by the United Nations World Tourism Organization (UNWTO) as a distinct portion of the tourism market. This classification of visitors to a country was necessary to allow governments and authorities to supply the correct infrastructure to suit incoming tourist's needs. A further breakdown of the business tourism sector leads to the identification of the meetings market. As Davidson (1994) noted, meetings can take many forms lasting from less than a day to a week or more. Hanley describes the meetings industry as 'a multifaceted and complex industry... (which) consists of numerous supply side operators connected by a wide web of consumption activity (2008: 2). Oppermann and Chon (1997) identify three main players in conference tourism; these are the organising association, the host location and the potential attendees. They believe that both the host location and the organising association have a common goal; the maximisation of the number of attendees. Swarbrooke and Horner (2001) recognize the stakeholders in the larger business tourism field dividing them into three distinct areas; demand, intermediaries and supply. Figure 1.1 is an amended version of Swarbrooke

and Horner's (2001) structure of business tourism which represents the stakeholders specifically involved in the meetings area of business tourism.

Figure 1.1 Structure of business and travel tourism



Source: Adapted from Swarbrooke & Horner (2001:7).

Unlike other industries such as manufacturing and agriculture, meetings and conventions continues to grow, not as quickly it has to be said, despite present economic factors. Abbey and Link (1994) observe that the main reason the meetings and conventions industry fares better during economic lows is due to the increased need for face-to-face meetings for business travellers to stimulate trade. Conferences also are less affected by global shocks such as the events in the US on 9/11/2001, Sars and swine flu as they are planned so well in advance (Madden, 2007).

Hanley (2008: 61) links the rise in the importance of the quaternary sector to the increased need for conferences. The quaternary sector can be described in short as the intellectual, research and development or informational sector of an economy. Hanley notes that this part of an economy is only to be found in advanced economies and requires conferences to disseminate the 'new information and updated knowledge'. Hanley (2008:62) lists a number of factors that have led to the development of the meeting and conference industry such as:

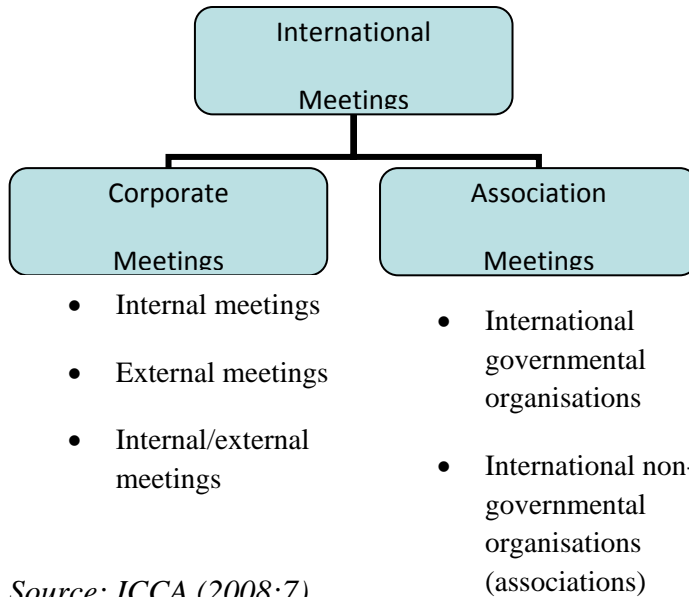
- Expansion of government organisations and an increasing need for meetings between public and private sectors;
- Prevalence of multinational corporations and pan-national organisations necessitating meetings;

- Increased membership of associations, cooperatives, professional and pressure groups;
- Development of sales techniques, product launches and sales meetings;
- The need to disseminate information and methods within corporations, and the professional development opportunities on offer;
- Subject specialisation and the need for conferences to pass on this information.

Association meetings and corporate meetings

The meetings and conference industry can be segmented into two parts; the association and the corporate sectors. The association sector can be further divided into professional associations (work related) and voluntary associations (personal interest related) or 'international governmental organisations and international non-governmental organisations' (ICCA, 2008:7).

Figure 1.2 ICCA's segmentation of meetings market



Corporate and association sectors can be differentiated in a number of ways. Weber (2000) says that corporate meetings require shorter lead times than association meetings. Braley (cited in Weber 2000) notes that association meeting attendance is significantly higher than at corporate meetings. In saying that, the international trend recently is more towards smaller meetings, the percentage of meetings with attendance figures between 50 and 149 has increased, the meeting size of 250 to 499 delegates is still the most popular but is losing its share steadily since 2000 (Indecon, 2008: 11). ICCA note that most of the associations on their database have between 250 and 500 participants but North America and Latin America buck the trend with average attendances of 1,027 and 667 respectively (2009:10). Association conferences also occur less frequently and tend to be held in the shoulder and low seasons. ICCA list the

most popular months for organising association meetings as September, June October and May, in order of popularity (2009:10).

Site selection is also an area of differentiation between association and corporate meetings, as corporate site selection can usually be based on the location of corporate headquarters or offices, whereas associations can vary their site selection on the basis on national of international membership. As Weber states, site selection for association conferences ‘depends to a large extent on association executives, and in many instances equally so on association meeting planners’ perceptions of the destination’(2000:600). ICCA have discovered the a ‘growing minority of about 25-30% of the decision-making processes no longer include an official bidding procedure, but have a “central initiator” who selects the location and venues based on pre-determined and strict criteria’ (2009:7). Site selection will be studied further later in this paper. Oppermann and Chon (1997) note that spousal attendance is a feature of association meetings which is not commonplace in corporate meetings.

Freedom of choice is also discussed by Oppermann and Chon, who state:

Yet the main distinction appears to be the “freedom of choice” on the side of the association meetings attendees, while corporate meetings are usually a requirement for the employees. Hence, whereas expenses incurred at the latter are generally covered by the organizing company, participants of association meetings have to fund their travel expenses themselves or obtain funding from a third party (Oppermann & Chon, 1997: 179).

Rogers (1998) summarises the difference between association and corporate conferences outlined in *Table 1.1*.

Table 1.1 Characteristics of corporate and association buyers

<i>Corporate Buyers</i>	<i>Association Buyers</i>
<p>Corporate buyers are employed by 'for profit' organisations</p> <p>Corporate organisations are to be found in both the manufacturing and service sectors</p> <p>Event decision making process is straightforward and more or less immediate</p> <p>Events have a relatively short lead time</p> <p>Corporate buyers may organise a wide range of events</p> <p>Delegate numbers are typically less than 100</p> <p>Mostly use hotels, purpose built conference centres and unusual venues</p> <p>A higher budget per delegate, with the company paying</p> <p>Events are organised year-round</p> <p>Events typically last 1-2 days</p> <p>Accommodation normally in hotels (3 star and upwards)</p> <p>Delegate partners rarely attend</p>	<p>Association buyers are employed by 'not for profit' organisations</p> <p>Associations are to be found in both the manufacturing, service and voluntary sectors</p> <p>Event decision-making process is prolonged, often involving a committee</p> <p>Major conferences have relatively long lead time</p> <p>Association buyers organise a more limited range of events</p> <p>Delegate numbers are often several hundred, for the larger associations, can be several thousand</p> <p>Mostly use purpose-built conference centres, civic and academic venues</p> <p>A lower budget per delegate, with the individual often paying</p> <p>Major events primarily in the Spring and Autumn, with some in the summer</p> <p>Major conference typically last 3-4 days</p> <p>Wide range of accommodation required</p> <p>Delegate partners frequently attend</p>

Source: Rogers (1998:32).

As is outlined in *Table 2.1* corporate meetings and conferences are more frequent, smaller and require less 'red tape'. Association meetings and

conferences are planned well in advance (sometimes over five years), with a prolonged decision-making process involving committees, have much larger attendance and are held less frequently. All these factors with regard to association conferences are understandable considering the revenue importance of conferences to associations. Although they are less frequent, most associations depend on conferences to boost income to the organisation. Rogers observes that the associations may be 'not-for-profit', but the events must cover their costs and can be expected to produce a return which 'can be re-invested in the administrative and promotional costs of future conferences' (Rogers, 1998: 29).

In Ireland the association conference market is 38.5 percent of the total business tourism market, coming a close second to the corporate sector which stands at 51.2 percent. In the Midwest region there is less of a gap between corporate and association sectors with corporate accounting for 49 percent and association taking 47 percent of the share.

Advantages of conferences to host destinations

Conferences and meetings are important revenue providers to destinations worldwide and with the current economic situation competition is fierce to host conferences. Hanley notes that the meetings industry is 'considered resilient and sustainable in the long run' (2008:3) making it an attractive investment

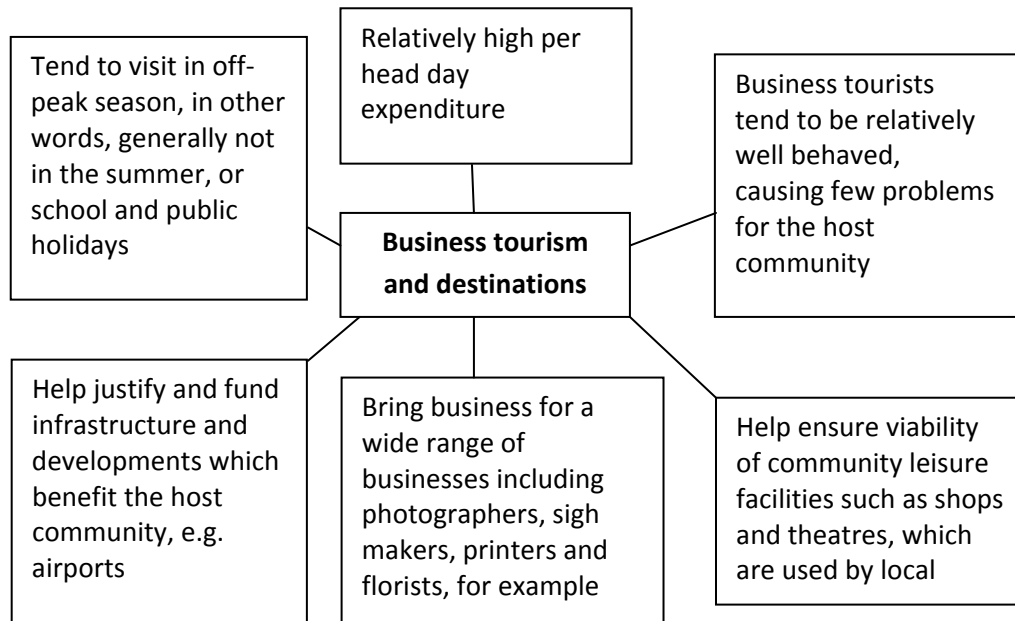
opportunity for any country or city. Although the importance of the industry is recognised by many governments and authorities, information regarding visitor spending is hard to rely on due to the splintered nature of the industry and the sheer number and variation of suppliers. As seen in Swarbrooke and Horner's diagram of the benefits of business tourism (*figure 1.3*), delegate expenditure is a significant reason for destinations wanting to attract conferences. Delegate expenditure is generally higher than that of the pleasure traveller. The average expenditure per delegate in 1997 was €18, this increased to €630 in 2006 (Indecon, 1998:19). Opperman (1996) says that the conference delegate in New Zealand spends almost three times the amount of the average tourist per day. In Ireland the average expenditure of association conference attendees over a period from 2004 to 2007 was €76.8 million (2008: 28). Not only is the expenditure an important result of conferences, New Zealand has identified the conference delegate as an important tool for promoting their tourism industry. Oppermann (1996) says that the customs process upon entering the country had been simplified for attendees to make their visit to New Zealand a memorable and pleasing one from the moment they arrive in the country. This positive impact can result in returning visitors and complimentary word-of-mouth reviews of a destination resulting in a powerful promotional instrument.

Due to the shoulder and off season nature of conferences they are an attractive addition to any tourism industry, resulting in the stabilisation of annual turnover in the tourism trade. Oppermann and Chon note that conference

attendees bring many economic benefits to the host location though their expenditure on accommodation, food and beverages, transportation and varied spending (Oppermann & Chon, 1997: 180). Fenich (1992) observes the value of direct expenditure by visitors which is spent on transportation, restaurants, accommodation and so on. This in turn leads to indirect expenditure when the companies involved pay their employees, suppliers and taxes and this money is returned to the economy of the destination.

Related to the seasonality aspect of conferences is the time of week that conferences may be held, Thursday to Sunday may be the domain of the leisure traveller but conferences can even out the weekly demand. Oppermann (1996) says that the conference market is a valuable asset for destinations as it is a good source of repeat business and word-of-mouth advertising. The type of people who are discussing the destination is also of importance as 'convention attendees are normally opinion leaders, who are in a very good position to influence others about a country or region and its offerings' (Zhang, Leung & Qu, 2006: 1123). Swarbrooke and Horner's diagram (*Figure 1.3*) outlines the main benefits of business tourism to destinations.

Figure 1.3 The main benefits of business tourism for destinations.



Source: Starbrook and Horner (2001:9)

All of this interest in the convention market can be seen in bricks and mortar around the world with the prevalence of new convention and meeting facilities being built or updated. The surprising thing is that many of these convention centres will never make a profit (Fenich, 1992). Most locations judge the success of a conference on the amount of revenue generated in the area rather than profit in the conference facility itself. Fenich (1992) lists some of the benefits for a destination of conference centres as being;

- Convention delegate spending;
- Levels of employment ;
- Enhanced image;

- Counteracting blight (developing rundown areas of a city);
- Improved fiscal benefits for communities.

Destination choice/ Site selection

As we have seen, attendance is an important element of any meeting or conference and the location of these events is an important inhibitor or motivator to attendees, therefore site selection can be classed as a vital decision for planners. Severt, Wang, Chen and Breiter (2007) referred to Rittichainuwat et al.'s 2001 study on motivating factors which listed sightseeing, among others, as a primary motivating factor for attendees deciding to attend. Severt et al. also discovered as part of their investigation that 'attendee considerations for participation and planner criteria for site selection share similarities. This is good news that suggests the gap between meeting planners and attendees could be small' (Severt et al., 2007: 406). As part of that, each destination may or may not have the attributes required by the planner such as 'price, type of venue, quality of facilities and proximity to tourist attractions' (Rogers, 1998:100). As mentioned previously, the corporate sector site selection for meetings is generally dictated by the location of headquarters or branches, association conferences are more flexible and site selection information is generally in relation to association conferences. To understand how site selection decisions are carried out it is important to know what exactly is required by the planner. Previous research has attempted to establish this and

there are many different lists in existence as to what is required. Throughout the research into the needs and wants of conference planners some features are common to most, these are issues relating to:

- Access to destination
- Accommodation
- Meeting/ conference facilities
- Affordability/ price
- Restaurant/ dining facilities
- Transport to and at the destination
- Location Image
- Climate
- Security/ safety/ stability
- Local attractions/ sightseeing

Site selection also depends on those making the decision, which can differ from association to association. Those involved in the decision can be referred to as the buying centre. Clark and McCleary list the possible members of an association buying centre as ‘meeting planners, association executives, board members, members of the site selection committee, or powerful individual members’ (1995:63). Who has the most influential role in these buying centres? It is commonly agreed that the meeting planner has the most power. Both Oppermann (1996) and Baloglu and Love (2005) class meeting planners as being an important target for destinations trying to attract conferences, as they have the power to include possible destinations on the final shortlist.

Baloglu and Love say that meeting planners 'play a key role in including convention cities in the final consideration set...because of their expert and information power' (2005:744).

Destinations wishing to place themselves in the running for selection must be included in the evoked set. Opperman (1996) recommends familiarisation trips as a way of improving a destinations competitive edge by increasing chances of being included in the evoked set.

Irish Meetings Market Development

Hanley (2008:10) notes that Europe held 53.6 percent of the world in 2007 which was a drop from previous years. According to Indecon (2008) the Irish market has been in decline in relation to the number of association meetings since 2005, but with the introduction of the Convention Centre Dublin and the opening of the Aviva Stadium for conferences this decline is set to change. Already the Dublin Convention bureau has noticed an increase of 34 percent on 2009 in enquiries (Fletcher, 2009). Henderson (2009) reported that the Convention Centre Dublin had 29 confirmed bookings which equals 200,000 delegate days and is worth €64.8 million to the city. It also has to be noted that the Convention Centre Dublin is not due to officially open its doors until 1st September 2010. ICCA's 2008 report on association meetings ranks Ireland

32nd on the list of meetings per country, and Dublin 28th for the number of meeting per city.

As with the worldwide meetings market, Ireland has recognised the importance of business tourism to the economy. Hanley notes that due to the competitive nature of tourism globally it ‘necessitates the decomposition of the tourism industry into subcomponents to be analysed and marketed on an individual basis’ (2008:2). This can be seen in the focus of many countries, including Ireland, moving towards business tourism.

Indecon (2008) reports that the expenditure of international conference delegates between 2004 and 2007 was worth around €200 million to the Irish economy. The change in the economy has encouraged more promotion of this sector by stakeholders in the industry such as Tourism Ireland and Fáilte Ireland. Both have recently revamped websites aimed specifically at the meetings, incentives, conferencing, exhibitions market (MICE). Conference and Incentive Travel (2009) reported that ‘Ireland plans to invest close to one million pounds in promoting its business tourism offer in 2010, with 30 percent of it’s spend targeting the association market’ (Wyatt, 2009). This spend is up 20 percent on the 2009 budget indicating the importance of the business tourism market. The Minister for Arts, Sports and Tourism in 2007, Seamus Brennan, while visiting the site of the new convention centre in Dublin, said that his department forecast business tourism visitors to grow from 295,000 to

600,000 by 2013. This increase in monetary terms would be a jump from €475 million to one billion by 2013 (Department of Arts, Sports and Tourism, 2007). In 2009 Miriam Kennedy, manager of the Convention Centre Dublin (CCD) reported that there was a 34 percent increase in inquiries at the Dublin Convention Bureau from 2008 (Fletcher, 2009) which has resulted in confirmed bookings as discussed previously. These figures may suggest the potential for a success story but Hanley notes some issues which may hinder this development, namely Ireland's competitiveness. Hanley pinpoints a change in the level of competitiveness occurring in 2000, he identifies a number of issues relating to this; inflation and price increases in key tourism sectors of the economy including accommodation and restaurants, also comparatively high VAT rates and high insurance costs (2008:12), which in this price sensitive time could become a mitigating factor in the expansion of this area of the economy. Linking to the change in competitiveness in 2000 was the harmonization of the European currency which accentuated the differences in prices being charged across Europe, this change made price comparison a simple task for incoming tourists and delegates resulting in dissatisfaction. From 1999 to 2005 Ireland has seen a price disparity with the rest of Europe of 11.7 percent (Hanley, 2008:12). However, the Irish Independent recently reported that Dublin was becoming more competitive, ranking cheaper than cities such as New York, Barcelona, Berlin, Amsterdam and London, to name a few suggesting that the tide may be turning.

The Midwest of Ireland as a Conference Destination

The promotion and investment in the East of Ireland could be seen as a concern for the West, but in the past the Shannon region hosted 12 percent of international association meetings held in Ireland (Indecon, 2008:43). This is the second highest regional share in the republic after Dublin. As with Dublin and Cork, the Midwest region has an airport, university, sufficient accommodation and access to the third largest city in the republic, Limerick. Conferencing facilities are widely available across the region as are tourist attractions.

The capacity of the conferencing facilities in the Midwest range from less than 149 delegates (34 percent of venues providing this capacity) to over 1000 delegates, four venues in the region can cater for this capacity (Indecon, 2008: 58). It is believed that the Midwest is:

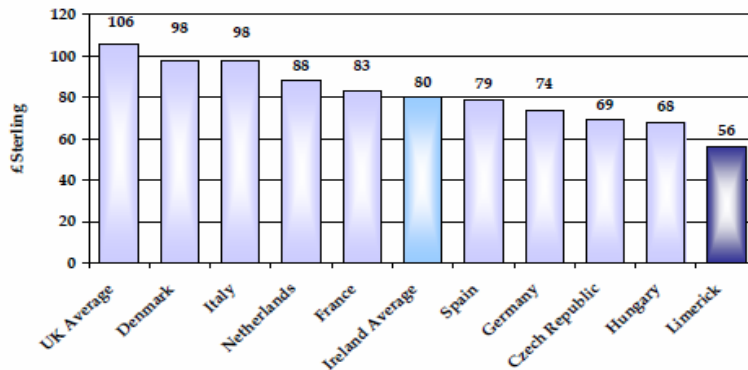
...well-served in terms of meeting facilities that can provide for events involving up to around 400-500 delegates, with particular capacity to accommodate events entailing up to approximately 250-300 delegates (Indecon, 2008:59).

As mentioned previously, the ICCA's 2008 report identified most meetings in the ICCA Association Database as having between 250 and 500 delegates which reinforces the position of the Midwest's ability to facilitate international association meetings. County Cork could be seen to be the nearest competitor both geographically and with the conference and tourist products on offer.

Cork can also cater for conferences from less than 149 delegates to over 1000. In the mid-range of 250-500 capacity, 34 percent of conferencing facilities meet this demand (Cork Convention Bureau, 2010).

Accommodation supply in the Midwest is high with the total number of hotels (82) accounting for 10 percent of the national number of hotels (Indecon, 2008:65). Although there are plenty of beds available, the quality of the accommodation has come under scrutiny. The Shannon/ Limerick region falls behind Dublin and the South West with regard to the number of five star hotels in the region. The region's offer of four star accommodation is even more noticeable in its deficiency with Dublin, the South West and the West all leading in their offer of accommodation at this level (Indecon, 2008:65). In summary there is an adequate supply of hotel beds in the region, but the category of hotel may pose an issue when attempting to attract the international conference market. Although the type of hotel on offer may not be of a preferred standard, the pricing of the rooms on offer in the region make it competitive in comparison with other destinations, which when the current economic situation is taken into account may be the advantage needed to compete with other destinations. *Figure 1.4* shows Limerick's competitive performance with regard to hotel pricing in comparison with other European cities.

Figure 1.4 Average price per room per night 2007 – Selected Countries



Source: *Indecon analysis of hotel price index (Indecon, 2008:68)*

As mentioned previously the location of an airport in the Midwest is an advantage in terms of attracting international conferences. Shannon Airport receives flights from transatlantic destinations such as Chicago, Boston, New York, Atlanta, Philadelphia and Newark and European destinations such as Paris, Biarritz, Krakow and Tenerife. Within the UK destinations such as London Stansted and Luton (Indecon, 2008: 72). Recently the number of flights has decreased as some airlines such as Ryanair and Aer Lingus have ceased to operate a number of routes from Shannon. Aer Lingus terminated the Shannon Heathrow route in 2007 which was a major cause for concern at the time, but this route was reinstated in March 2009 due to political pressure. Ryanair removed 18 routes from the airport as of March 2010. Some of the routes included were; Murcia, Birmingham, Bristol, Brussels, Barcelona and Venice. This may not bode well for the future of the airport, especially as Ryanair brings the largest amount of passengers, 60 percent, through Shannon (Commane, 2010). With this in mind Cork airport is a major competitor with

Shannon and the Midwest, as it has access to many major European destinations, major American cities, Asian and Middle Eastern cities (Indecon, 2008:73). In a survey of overseas professional conference organisers (PCOs) only 50 percent believed that air access to Shannon/ Limerick area was adequate (Indecon, 2008:74), which needs to be addressed by the relevant agencies.

Shannon Development has focused on promoting tourism in general for the Shannon region and The Shannon Region Conference and Sport Bureau have focused on the sports and business tourism sector. Indecon note that the Midwest retained a nine percent share of the national promotable business tourist market in the period 2004-2007 (2008: 36). Promotable business tourists can be described as those business travellers that don't necessarily have any business contacts or colleagues in the location and could in theory go elsewhere. As seen in *table 1.2* 2007 saw the percentage share of international association conferences stand at 12 percent making it the second most successful region for attracting association conferences behind the capital which was discussed previously.

Table 1.2 Regional breakdown of International Association Conferences held in Ireland in 2007

Region	Number	% of total
Dublin	89	66
Shannon	16	12
South West	12	9
West	9	7
Midlands	7	5
South East	2	1
North West	0	0
Total	135	100

Source: Indecon Analysis Fáilte Ireland Data (Indecon, 2008:43)

To attempt to profile the promotable business tourists referred to previously, Indecon revealed that most came by air from Britain (67 percent of corporate visitors and 66 percent of association visitors), with the majority of other delegates originating from mainland Europe and transatlantic destinations, they stayed from one to three days and mainly used hotel based accommodation, and over the three year period spent €34.7m. These figures may change downwards in the coming years with the opening of the Conference Centre Dublin, but the capacity of the centre is geared more towards larger conferences and the sightseeing and attractions on offer in the Midwest may prevent a major loss to the market.

The Midwest has long been a popular region for pleasure tourists, with many attractions and activities on offer. As mentioned previously Severt et al. (2007) referred to Rittichainuwat et al.'s study on motivating and inhibiting factors affecting association members attending international conferences listed sightseeing as a high scoring reason for attendance. It was also listed in all

studies mentioned previously in the section on site selection. In the Midwest there are natural attractions; Cliffs of Moher, Ailwee Caves and the Burren to name but a few, historical features; Bunratty Castle, Holycross Abbey, and Cragaunowen, activities; surfing, canoeing, horse riding and walking and finally arts and entertainment offers such as traditional music festivals, the University Concert Hall and many bars and restaurants in the region. Indecon note that these offers by the Midwest region 'can be used as a complement to and a lever for the development of promotable business tourism in the area' (Indecon, 2008: 80) which is reinforced by the findings of a survey which found that nine percent of overseas PCO's surveyed found the access and availability to high quality tourist attractions in the Shannon/ Limerick region exceeded requirements and 82 percent found it to be adequate to requirements (Indecon, 2008:80). However it can be argued that Cork also offers many attractions such as; Blarney Castle, Jameson Heritage Centre, Fota Island, Cork Gaol and Cork Harbour and its Islands.

Lack of research

Though the meetings and conventions industry is a multi-billion euro industry worldwide, it is still an area that has not been researched to the full extent. Only relatively recently has the area been investigated academically (Oppermann & Chon, 1997: 188). Abbey and Link describe it as an 'untapped market for researchers' (1994:283). To date the research has been carried out by:

1. The industry itself through meeting associations
2. By trade publications within the convention field
3. By universities
(Abbey & Link, 1994: 276)

Even though these groups are carrying out research there is still a huge amount to be investigated. Abbey and Link also note that this lack of ‘information is a handicap to operating managers and tourism officials responsible for marketing and promoting their product and services’ (1994: 283), in addition they believe this omission affects meeting and conference planners. Previous research has focused on a number of key areas such as; images and perceptions of convention cities (Oppermann, 1996; Baloglu & Love, 2004), site selection (Clark & McCleary, 1995); decision making process regarding conference attendance (Oppermann and Chon, 1997, Zhang, Leung and Qu, 2007, Var, Cesario and Mauser, 1985) and convention centres (Fenich, 1992, Breiter and Milman, 2006); CVBs (Getz, Anderson and Sheehan, 1998, Morrison, Bruen and Anderson, 1998, Ford and Peeper, 2006).

Most of the existing published literature is related to UK, US or Australian research. Fáilte Ireland could be seen as one of the exponents of tourism research in Ireland offering funding and scholarships. Their website contains much information and statistics related to tourism in general and meetings and conferences, but there is always more research needed in an ever changing landscape both economically and in relation to trends.

Hanley (2008) examines the conference market in general in Ireland, focusing on the economic analysis of the market using an input-output method to ascertain the value of the conference market nationally to the economy. He also looks at the tourism market in general, the business tourism market and the Irish meetings market which is all of interest to the current study. However this does not focus on the Midwest region in particular which is the area of interest to this research. Indecon's analysis of the feasibility of having a regional conference centre in the Shannon/ Limerick area also touched on parts of the subject being investigated in this study, but the focus of this report was on past performance and the ability of the region to support a dedicated conference centre. The report also concentrates on the potential demand, size and capacity of the conference centre being suggested and the potential economic benefits to the region. As with Hanley's research Indecon does supply useful information which is relevant to this research such as a review of the international business tourism and conferencing market and assessment of the Shannon/ Limerick area but it does not investigate innovative ways to attract additional business tourists as this research aims to do. The current study will continue by focusing on the methodology to gather primary data through interviews, questionnaires and an audit of the associations the Midwest has the potential attract.

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