

Report on Convention and Exhibition Industry in Chinese Second-tier Cities 2010-2012

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Abstracts

Second-tier cities refer to those metropolitan cities with relatively great influence on domestic economy and society, which is mainly regional influence, and is less than that of first-tier cities. In terms of urban size and economic level, the second-tier cities are generally superior to other cities in the regions, and have influence on economy and culture of the third-tier and fourth-tier cities in surrounding metropolitan area. For instance, Hangzhou influences economy and culture of Huzhou, Jiaxing, Shaoxing and other cities in Zhejiang Province.

In China, no fixed standards are set for the division of the second-tier cities, which can be divided by economic level, urban size and population. The division is largely related to the grade (municipalities or sub-provincial cities) and the development of the local real estate industry in cities.

In this report, Chinese second-tier cities include Tianjin, Nanjing, Hangzhou, Chongqing, Chengdu, Wuhan and Xi'an. The report gives an introduction of urban industrial layout and major conventions and exhibitions held in 2010-2011, and carries out estimation for direct revenue of the convention and exhibition industry. Besides, the report also makes a prediction on development tendency of the convention and exhibition industry in these cities in 2011-2015, and proposes development recommendations.

In China, the convention and exhibition market has become gradually saturate in the first-tier cities represented by Beijing, Shanghai and Guangzhou, and is bound to expand to neighboring regions. With development of Chinese economy and gradual perfection of the regional convention and exhibition market, rapid development of various hardware and software services has become the focus of competition of brand exhibitions held by famous convention and exhibition enterprises.

The convention and exhibition industry in Chinese second-tier cities develops rapidly, and has initially taken shape. The convention and exhibition industry in cities of the Yangtze River Delta Region such as Nanjing and Hangzhou becomes prosperous relying on that in Shanghai, while the industry in the second-tier cities in Central and West China such as Wuhan and Chengdu gradually improves as well, and begins to possess the ability of hosting large national and international exhibitions. It is worth mentioning that the direct revenue of the convention and exhibition industry in Wuhan and Chengdu has surpassed that in Nanjing, Hangzhou and other cities located in the Yangtze River Delta Region, which reflects that these cities will become the hotspots of China's convention and exhibition industry.

Analyzed from the angle of economy, flow of factors of production from developed regions to other regions is normal. However, early layout of exhibitions in second-tier cities reflects the strategic thoughts of exhibition sponsors. There were precedents for the transfer of international exhibitions, e.g., German convention and exhibition industry with a long history has already become the center of European and even world's convention and exhibition industry for a long time. Due to the rise of other emerging convention and exhibition market in the world, an increasing number of brand exhibitions begin to expand to the whole world, which can be seen as the layout of German convention and exhibition industry in the world. From China and India in Asia to Brazil and Argentina in South America, these countries all begin to host internationally renowned brand exhibitions and enjoy good development trend.

View from development experience of international convention and exhibition industry, China's convention and exhibition market will also show the same trend. In terms of current situation of China's convention and exhibition industry, exhibition halls and urban infrastructure fail to meet the demand of the industry's development in first-tier cities due to high concentration of brand exhibitions, which leads to the transfer of the industry to the second-tier and even third-tier cities.

Market investigation of China Research and Intelligence shows that the convention and exhibition industry in Chinese second-tier cities presents a rapid development momentum, and annual direct revenue of the convention and exhibition industry increases at the rate of 20%-30%, having surpassed the growth rate in the first-tier cities including Shanghai and Beijing. Generally speaking, other second-tier cities in addition to Tianjin all possess metropolitan area surrounding core cities, such as Hangzhou metropolitan area including Huzhou, Jiaxing and other third-tier and fourth-tier cities, and Nanjing metropolitan area including Zhenjiang, Yangzhou, Ma'anshan

and other third-tier and fourth-tier cities. To a certain extent, the convention and exhibition industry in core second-tier cities may give an impetus to the development of the industry in satellite cities within the metropolitan area. However, as Chinese convention and exhibition industry started late with small market scale, the convention and exhibition industry in the second-tier cities is still in the rapid development period, and fails to show the indication of transferring from the second-tier cities to the third-tier and fourth-tier cities, where the convention and exhibition industry is generally small in scale, low in popularity and little in influence. These third-tier and fourth-tier cities generally lack professional convention and exhibition halls, mainly rent governmental facilities such as gyms, and even hold open air exhibitions. And many activities held in these cities such as "talent affair of the machinery manufacturing industry", "sales exhibition of Taiwan leisure food" and "sales of extremely cheap knitted sweater" do not belong to conventions and exhibitions in the strict sense. It is predicted that the tendency of large-scale transfer of the convention and exhibition industry from the second-tier cities to the third-tier and fourth-tier cities will only come into being after 2015 as the convention and exhibition industry in Chinese second-tier cities becomes gradually mature.

In terms of development strategy, though Chinese convention and exhibition enterprises can meet the requirements in terms of scale and visitors to set up all the large exhibitions in the first-tier cities, they lose preemptive opportunities to develop in the second-tier cities when they meet development bottlenecks in the first-tier cities. China's convention and exhibition enterprises should early take action to set exhibitions in the second-tier cities, and realize the transfer of the convention and exhibition industry and the exploration of new market, which are the general trend.

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