



## Destination Competitiveness Strategy To Asia Leading MICE Destination, Goyang



Thursday, 26 August 2021,  
10:00~13:30 (KST)

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Dongduk Women's University

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Destination Competitive Index **for Goyang**

2

Global Destination Sustainability Index **for Goyang**

3

For the Asia Leading MICE Destination, **Goyang**

## Purpose of the Research



Developing Strategies for Benchmarking, Innovation, Evolution



1

Destination Competitive Index  
for **Goyang**

## Destination Competitive Index for Goyang by GainingEdge (2020)

### Destination Competitive Index Study for Goyang

Submitted to the Goyang Convention  
& Visitors Bureau

20.August 2020



## Destination Competitive Index

GainingEdge' s Competitive Index is focused on the destination's meetings & conventions products.

the Index compares destinations in terms of:

1

Meetings infrastructure, capacity and access,  
(named as "hygiene factors")

2

Cost, market audience, destination appeal  
("competitive advantages")

3

Logistics, business environment and safety & stability  
("key differentiators")

## Destination Competitive Index by GainingEdge

The Index does not assess destinations' s 'Input' factors.

- the size of the convention bureau' s budget, size of its sales teams, the strength of sales and marketing efforts, subvention levels, etc.

The Index also does not consider uncontrollable factors.

- such as man-made or natural disasters.

If a destination is performing below the desired level, then the "controllable levers" like sales efforts and subvention can be adjusted.

If a destination is performing above levels indicated by the Index, then it' s quite possible those levers are already being pulled.

## Destination Competitive Index by GainingEdge

The Competitive Index does not attempt to measure "the best" or the "most successful" meeting destinations.

- The Competitive Index is not suggesting that any destination is better than another.

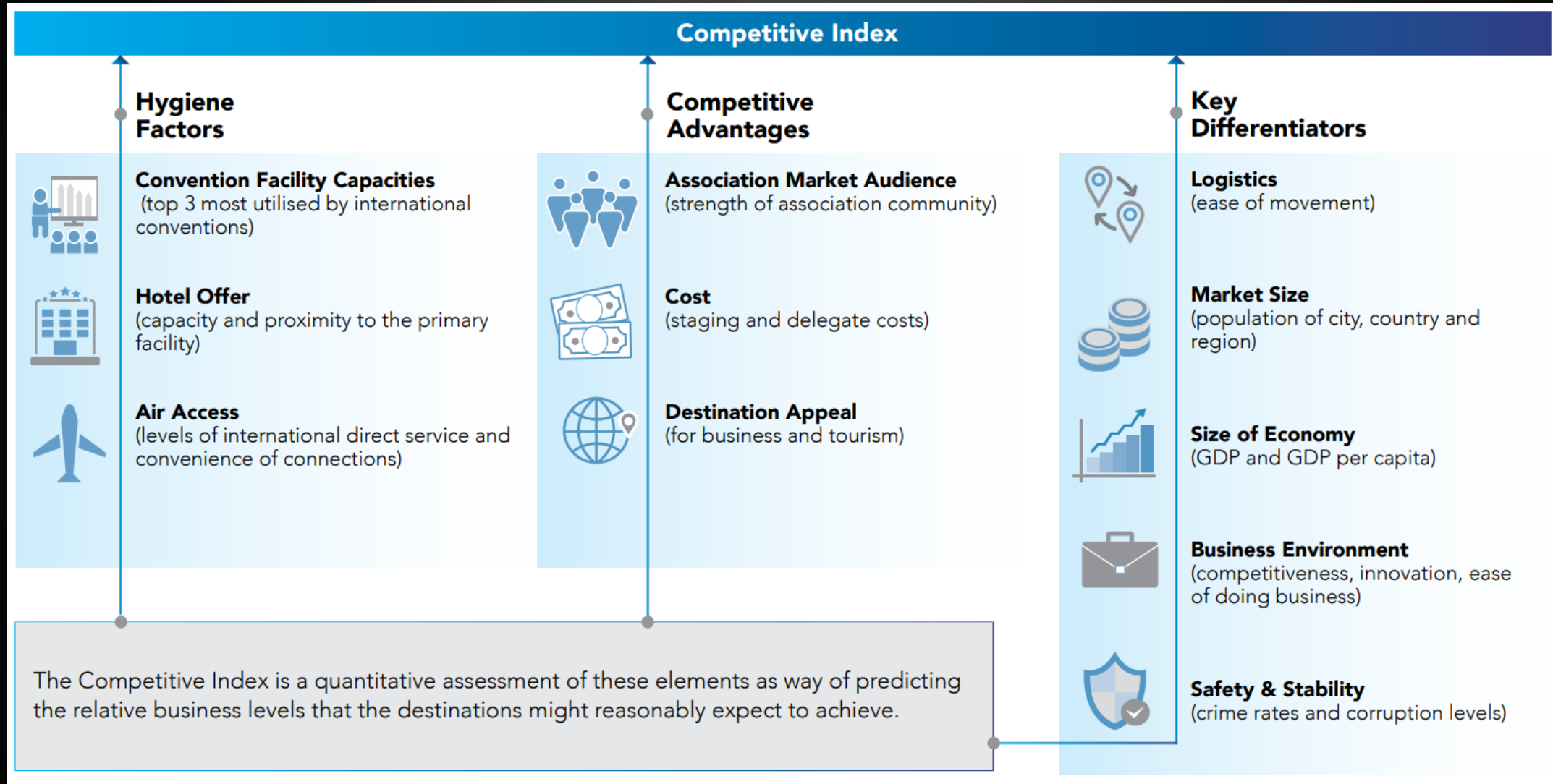
The Index is an assessment of how destinations compare in the strength of their product offering as well as other factors that impact on destination selection.

- The Index is a quantitative assessment of these elements as a way of predicting the relative business levels that the destinations might reasonably expect to achieve.

The Index is indicating that some destinations should reasonably be expected to host more or less meetings than others, within the defined competitive set, based on their relative strengths.



# Methodology



## Competitor Identification

### Principles used to select destinations

- **Rotation:** Well developed East Asian countries;
- **Size:** Second tier cities, with over one million inhabitants;
- **Profile:** Destinations adjacent to capital cities / global hubs in their countries (i.e. satellite cities of Asian global capitals);
- **Infrastructure:** Destinations in proximity to major airports in the East Asia region and which at least one large purpose-built convention center;
- **Prospective:** Good prospective for growth and possibility to develop its own meetings business brand.



### Selected destinations

- **Goyang**, Republic of Korea (near Seoul)
- **Incheon**, Republic of Korea (near Seoul)
- **Suwon**, Republic of Korea (near Seoul)
- **Saitama**, Japan (near Tokyo)
- **Chiba**, Japan (near Tokyo)
- **Suzhou**, China (near Shanghai)
- **Taoyuan**, Chinese Taipei (near Taipei)

## Analysis #1 : Goyang Destination Competitive Position

➤ Convention facilities are the strongest segment of Goyang's destination competitiveness (+ 22%) while again destination appeal (-26%), hotel offer (-21%) and logistics (-14%) are identified as relative disadvantages.

Factor/ Destination	Goyang	Incheon	Saitama	Chiba	Suzhou	Suwon	Taoyuan	TOTAL	Average	Ratio	
Convention Facilities	111	124.7	75.8	122.36	109	70.12	26	638.98	91.28	0.22	Strong
Hotel Offer	26	58.48	18.98	54.25	48.41	11.68	12.25	230.05	32.86	-0.21	Weak
Air Access	50	50	50	50	50	50	50	350	50.00	0	Weak
Destination Appeal	16.25	16.7	24.67	28.3	38.54	16.1	13.67	154.23	22.03	-0.26	Weak
Association Community	39.46	39.54	43.26	43.29	40.08	39.44	33.81	278.88	39.84	-0.01	
Cost	54.47	51.97	48.72	41.31	68.23	53.24	64.46	382.4	54.63	0	Weak
Logistics	31.45	37.54	41.6	45.02	37.58	33.86	29.3	256.35	36.62	-0.14	Weak
Market (population)	36.23	38.08	41.29	40.9	44.33	36.42	34.55	271.8	38.83	-0.07	
Economy (size)	34.58	34.58	37.16	37.16	37.8	34.58	33.28	249.14	35.59	-0.03	
Business Environment	46.54	46.54	45.51	45.51	43.53	46.54	45.71	319.88	45.70	0.02	
Safety & Stability	23.53	23.08	32.76	25.51	23.83	23.4	30.63	182.74	26.11	-0.1	
OVERALL	469.5	521.2	459.8	533.6	541.3	415.4	373.7	3314.5	473.50	-0.01	

## Analysis #2 : Goyang Destination Competitive Index / ICCA Statistics

- Since 2014 Goyang has hosted 10 meetings, similarly as Saitama and even less than Suwon and Taoyuan
- Goyang has a strong potential for growth in number of international association meetings and focus on large meetings

Meetings	Competitors	2014	2015	2016	2017	2018	2019	Total	CIR
	Goyang	1	3	1	1	3	1	10	469.5
	Incheon	5	4	17	16	12	11	65	521.2
	Saitama	0	0	1	2	3	3	9	459.8
	Chiba	4	10	6	8	6	11	45	533.6
	Suzhou	6	12	16	11	4	12	61	541.3
	Suwon	2	1	2	2	1	4	13	415.4
	Taoyuan	2	2	3	6	2	2	17	373.7

Participants	Competitors	2014	2015	2016	2017	2018	2019	Total	CIR
	Goyang	327	5,401	44,000	988	560	300	51,576	469.5
	Incheon	15,389	2,311	4,821	10,201	2,947	2,582	38,251	521.2
	Saitama	0	0	77	2,215	427	297	3,016	459.8
	Chiba	3,433	4,095	1,531	4,463	1,631	3,560	18,713	533.6
	Suzhou	2,433	2,131	6,770	2,505	321	2,183	16,343	541.3
	Suwon	154	74	179	458	123	1,624	2,612	415.4
	Taoyuan	519	460	370	1,744	870	290	4,253	373.7

### Analysis #3 : Goyang Destination Competitive 'Fair Share Analysis'

- A fair share calculation is very useful for a destination's goal setting related to the business' percentage of available inventory.
  - A destination's competitive score as a percentage (%) of the combined competitive scores in a given competitive set would represent its proportional fair share of the total business procured by that set

**Goyang was below fair share. -3.5 meetings per year in last 6 years.**

Destinations	CIR	Meetings in 2019	Meetings 2014-19	Product Share	Fair share 2019	Fair share 2014-19	+ / - per 6 years	+ / - per 1 years
Goyang	469.5	1	10	14.2%	6	31	-21	-3.5
Incheon	521.2	11	65	15.7%	7	35	30	5
Saitama	459.8	3	9	13.9%	6	31	-22	-3.7
Chiba	533.6	11	45	16.1%	7	35	10	1.7
Suzhou	541.3	12	61	16.3%	7	36	25	4.2
Suwon	415.4	4	13	12.5%	6	28	-15	-2.5
Taoyuan	373.3	2	17	11.3%	5	25	-8	-1.3
Total	3,314.1	44	220	100%	44	220	0	0

## Analysis #4 : Goyang Destination Competitive 'Momentum'

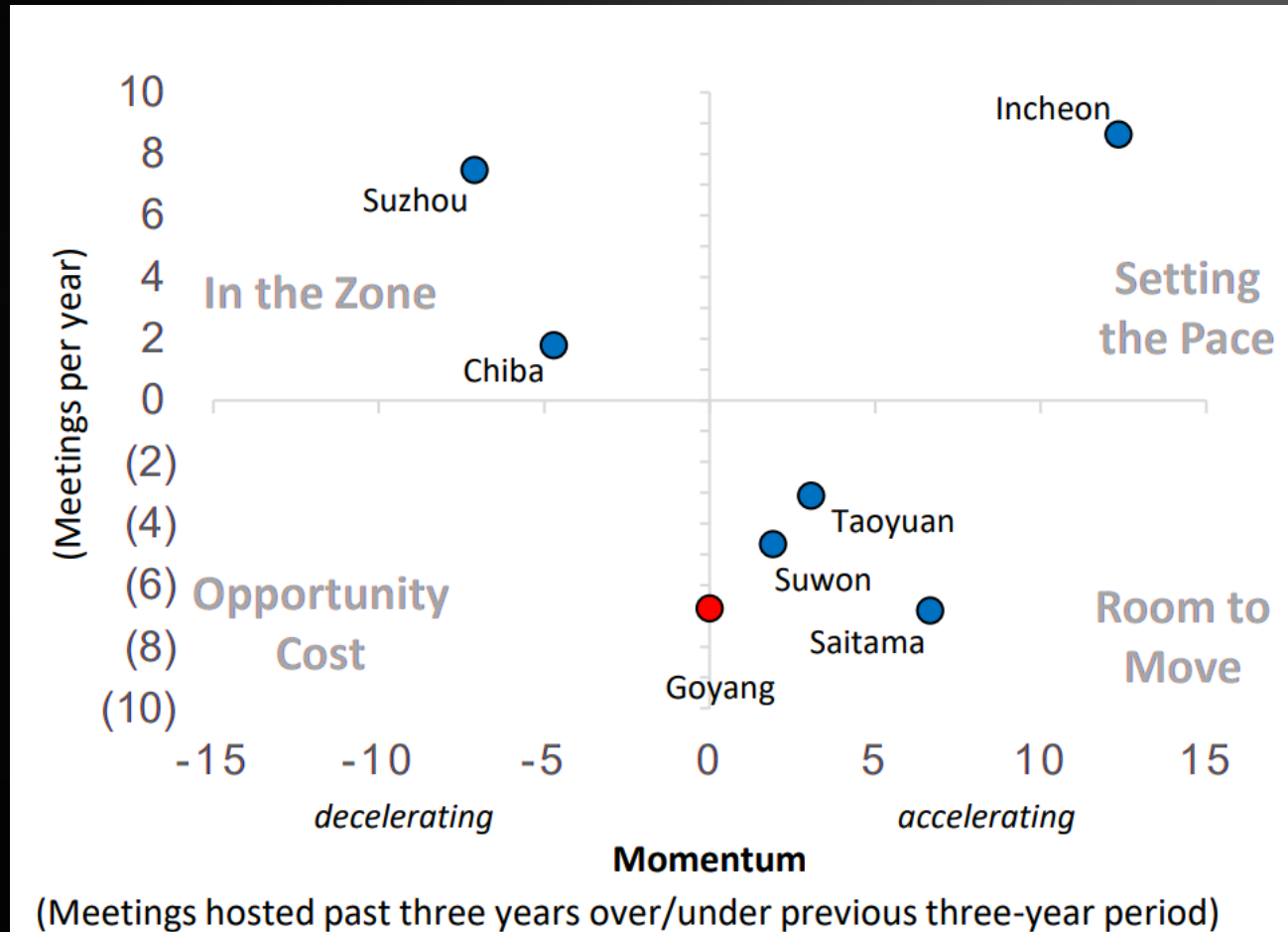
- The Momentum shows if the destination is accelerating or decelerating in terms of number of international meetings it hosted in a 3–years series.

Goyang has achieved the same number of meetings in 2014–16 as well as in 2017–19 period.

Destinations	2014	2015	2016	2014–16	2017	2018	2019	2017–19	Change
Goyang	1	3	1	5	1	3	1	5	0
Incheon	5	4	17	26	16	12	11	39	13
Saitama	0	0	1	1	2	3	3	8	7
Chiba	4	10	16	30	8	6	11	25	-5
Suzhou	6	12	16	34	11	4	12	27	-7
Suwon	2	1	2	5	2	1	4	7	2
Taoyuan	2	2	3	7	6	2	2	10	3
Total	20	32	56	108	46	31	44	121	13

## Analysis #5 : Goyang Destination Competitive 'Fair Share Scenario Dynamics'

Goyang is positioned between "Opportunity Cost" and "Room to Move".



➤ The Fair Share scenario model illustrates how cities compare in terms of their "fair share" and in terms of their "momentum."

- ✓ **Setting the Pace**: The city should be mindful that this position can be only transient if this is due to a temporary weakness on the part of the other cities who can recover their lost ground if they quickly act to remedy their gaps.
- ✓ **In the Zone**: The city are hosting fewer meetings on average than they did before but remain ahead of their fair share.
- ✓ **Room to move**: This means that they need to keep growing and leave this quadrant soon.
- ✓ **Opportunity Cost**: This means that they should look to accelerate their bid win pace significantly. Then they have an opportunity to improve their position in near future.

## Conclusion & Recommendations

# Destination Competitiveness Strategy for Goyang



### Infrastructure (Product) Improvement

A continual and long-term effort with "governance"

Improve Hotel & logistic issues to make the city's offer more flexible for business events



### Destination Branding

Goyang still does not have strong brand

Keep advantages due to its proximity to Seoul and predominant focus on the exhibition business



### Intellectual Engagement

Need to engage local leaders to bid for international meetings

Develop strong collaboration with the leading academic and scientific institutions in the city





2

Global Destination Sustainability Index  
for **Goyang**

## Global Destination Sustainability Index(GDS-I)

A destination level movement that benchmarks and improves the sustainability strategy and performance of business tourism and events cities, and their eco-systems.

Founding Members and Advisory Board :



# Development of Global Destination Sustainability Index(GDS-I)

**2012 SCANDINAVIAN DESTINATION SUSTAINABILITY INDEX**

Assessing and reporting on the sustainability performance of Scandinavian major meetings destinations

Project commissioned by the Scandinavian Chapter of the International Congress and Convention Association (ICCA)

Research sponsored and conducted by MCI



**2013 SCANDINAVIAN DESTINATION SUSTAINABILITY INDEX**

Assessing and reporting the sustainability performance of Scandinavian meetings destinations.

Project commissioned by the Scandinavian Chapter of the International Congress and Convention Association (ICCA)

Sponsored by VisitAarhus mci

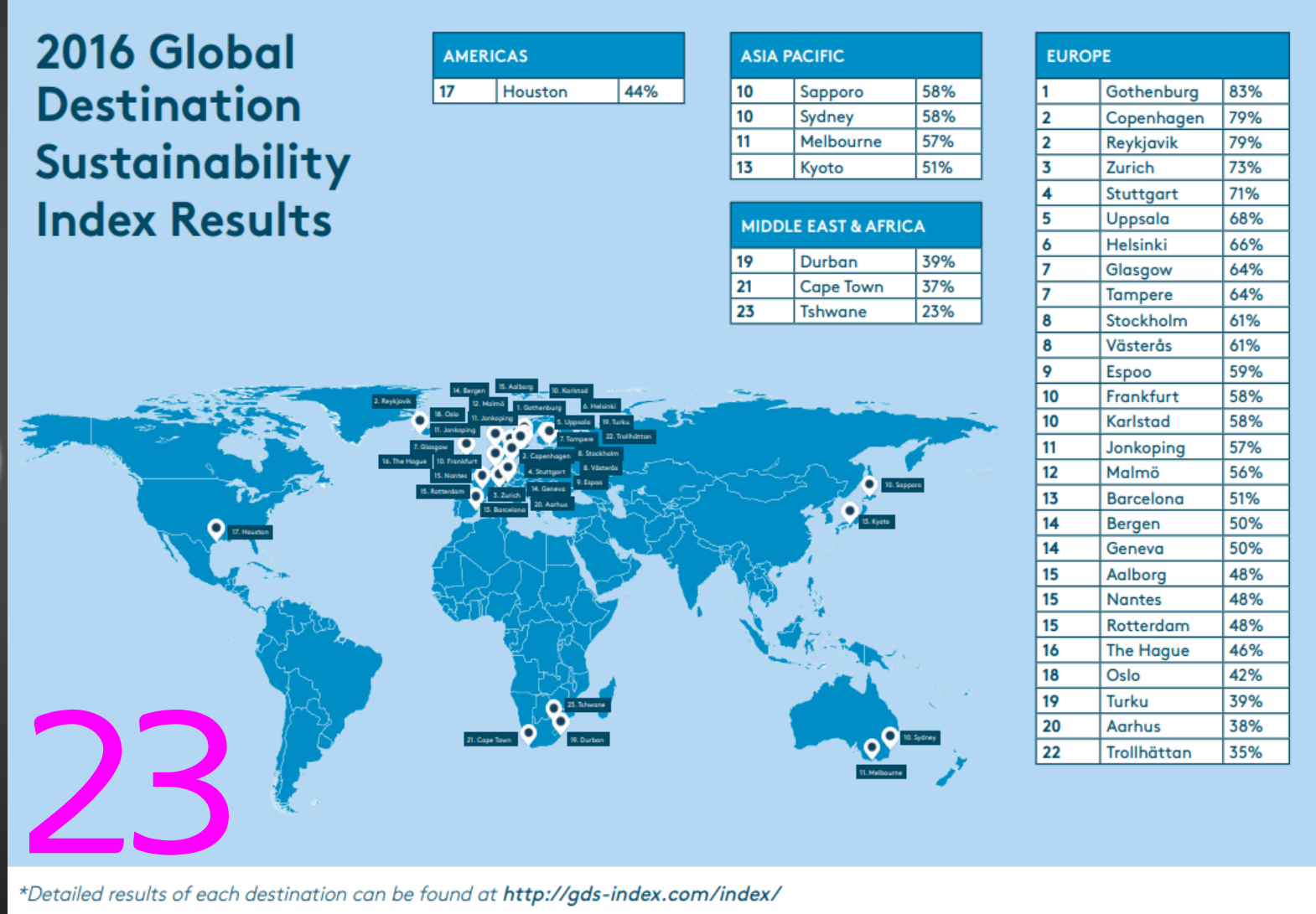
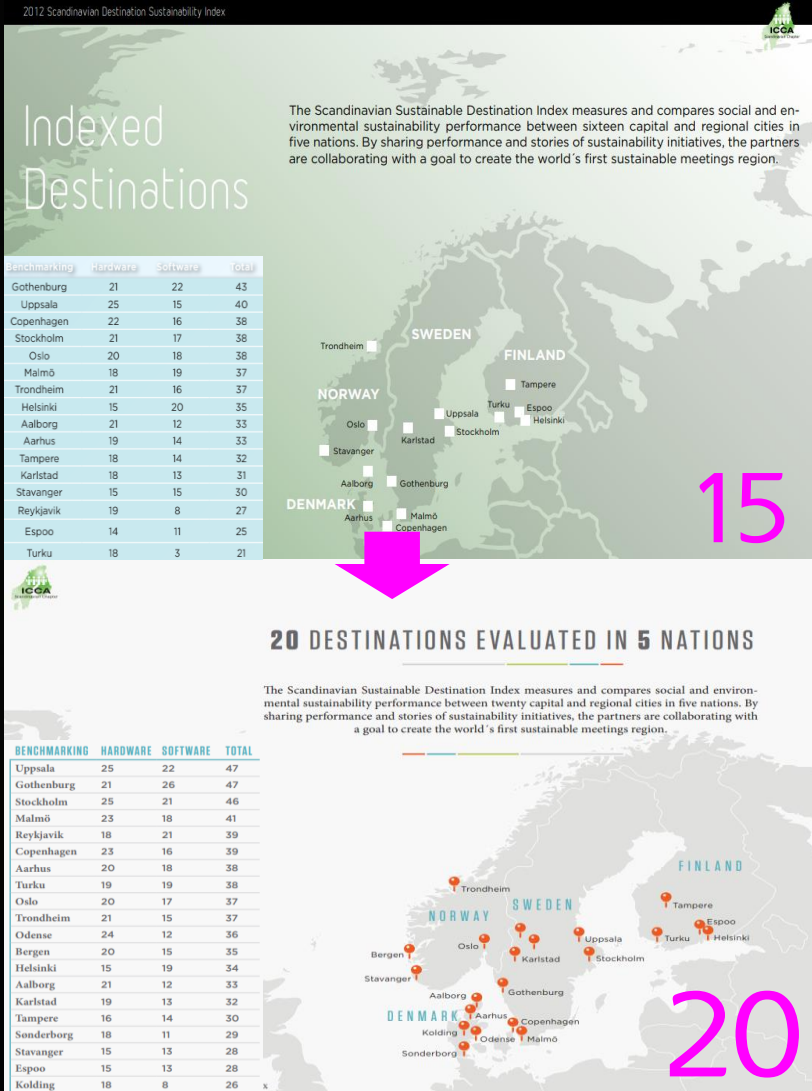


**Sustainable Destination Management Trends and Insights: A Path to a Brighter Future**

A WHITE PAPER AND ANALYSIS OF THE 2016 GLOBAL DESTINATION SUSTAINABILITY INDEX

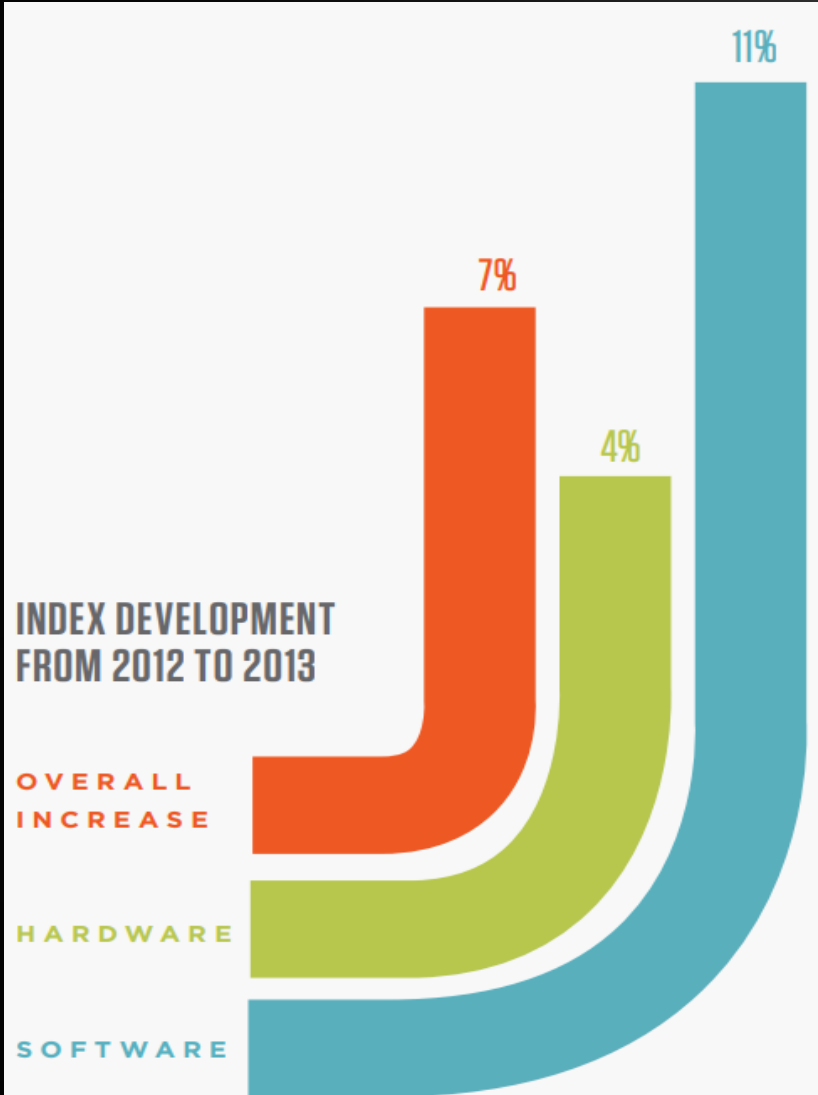
\* Source : <https://www.gds.earth>

# Development of Global Destination Sustainability Index(GDS-I)



\* Source : <https://www.gds.earth>

# Development of Global Destination Sustainability Index(GDS-I)



## ASSESSMENT METHODOLOGY

Developed by MCI Sustainability Services in close collaboration with the founding Scandinavian cities, the GDS-Index methodology measures and compares the social and environmental sustainability strategies, policies and performance of participating destinations using 35 criteria across four key areas.

After signing onto the Index, the destination Convention Bureau (CVB) or Destination Management Organisation (DMO) completes a questionnaire, gathering answers and providing key performance indicators and supporting data.

Consultants from MCI Sustainability Services assess and validate the answers, requesting corrections and/or further information as required. Each performance indicator is assigned a number of points according to how well the destination fulfils each indicator. These values are then aggregated to provide the final "Performance Score", and the website is updated to reflect the destination's ranking and performance in each category. For more details please consult [www.gds-index.com](http://www.gds-index.com).



### ENVIRONMENTAL PERFORMANCE

includes a city's performance pertaining to its policies and infrastructure, such as climate change commitment, recycling availability, public transport options and air pollution levels.



### CVB PERFORMANCE

indicates the sustainability commitment of the convention bureau itself, including questions pertaining to the existence of a sustainability policy and manager, communication of sustainability initiatives to support client planners, and the rigorosness of their reporting on sustainability operations.



### SOCIAL PERFORMANCE

indicates the development and corruption levels associated with the city's country.

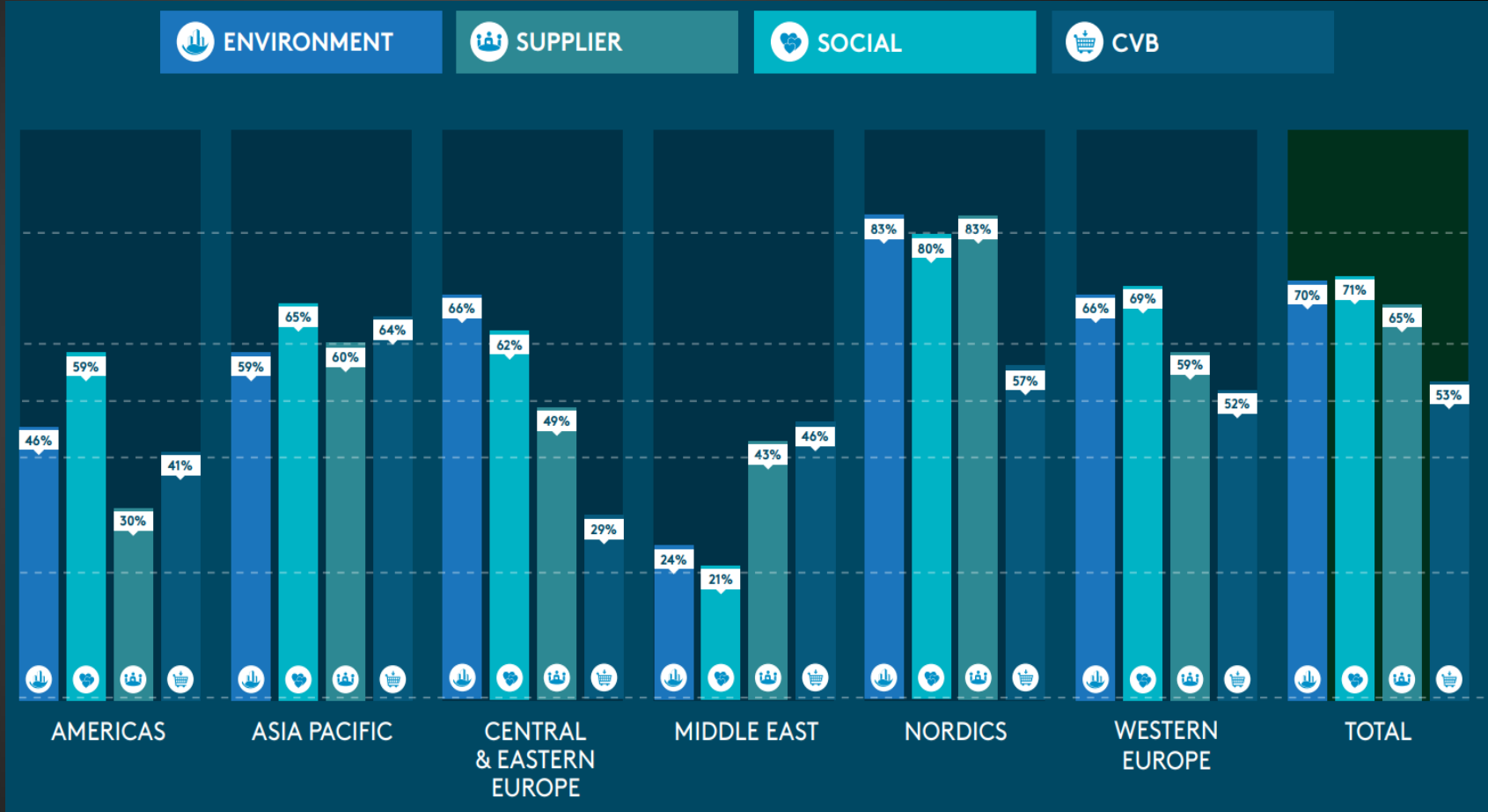
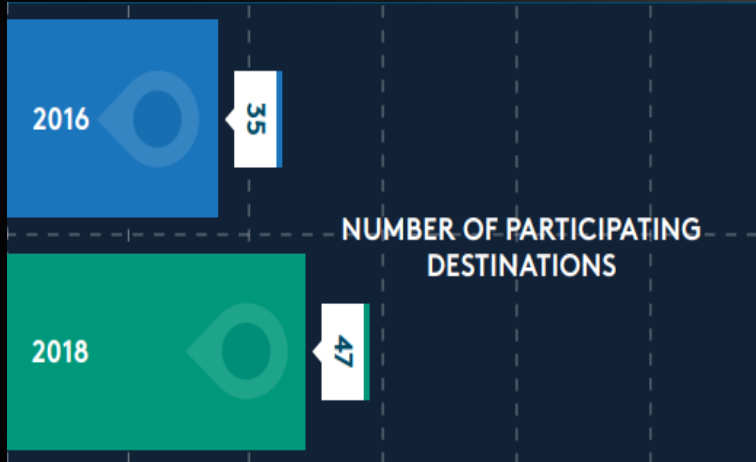


### SUPPLIER PERFORMANCE

addresses the sustainability commitment and performance of the local meetings industry supply chain, including hotels, venues and restaurants.

\* Source : <https://www.gds.earth>

# Development of Global Destination Sustainability Index(GDS-I)

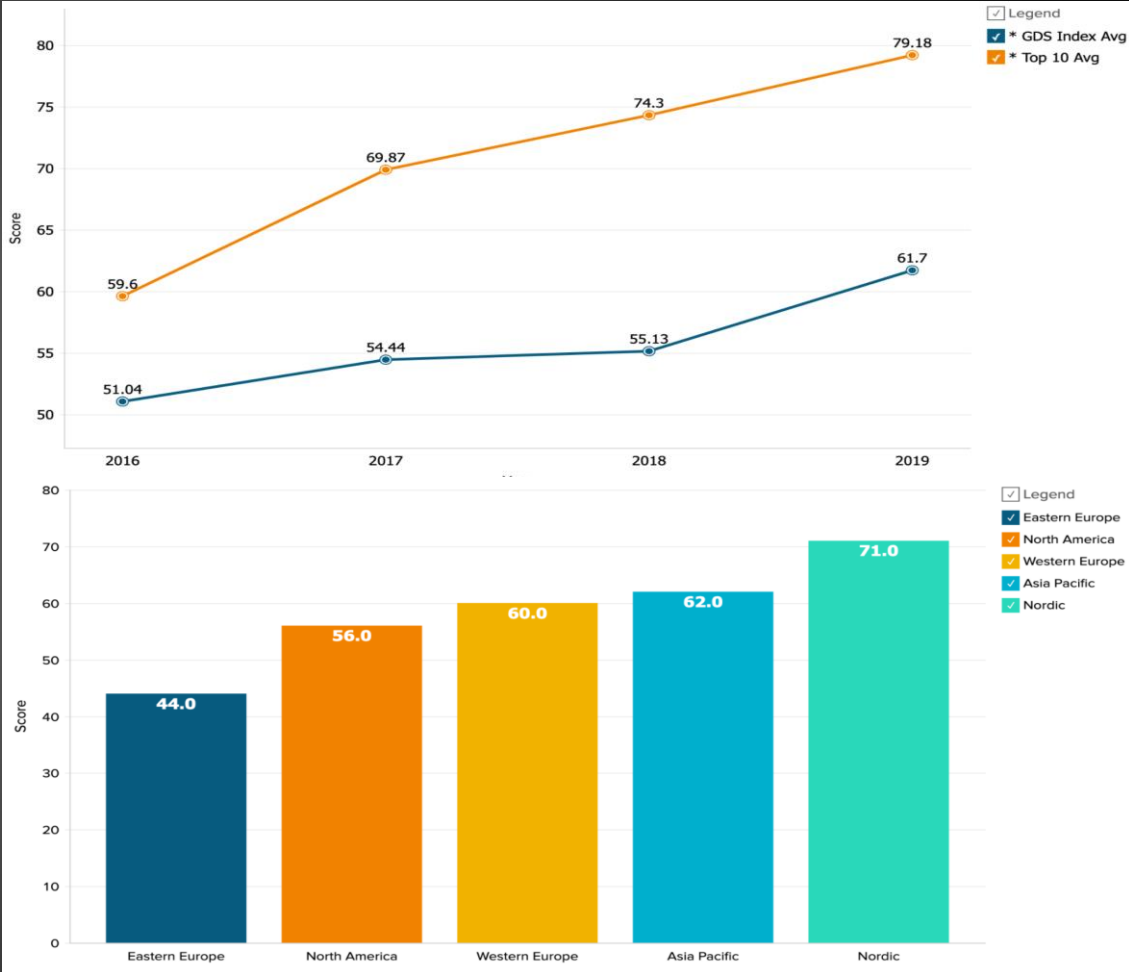


\* Source : <https://www.gds.earth>

# Development of Global Destination Sustainability Index(GDS-I)

GLOBAL DESTINATION SUSTAINABILITY INDEX  
**2019**

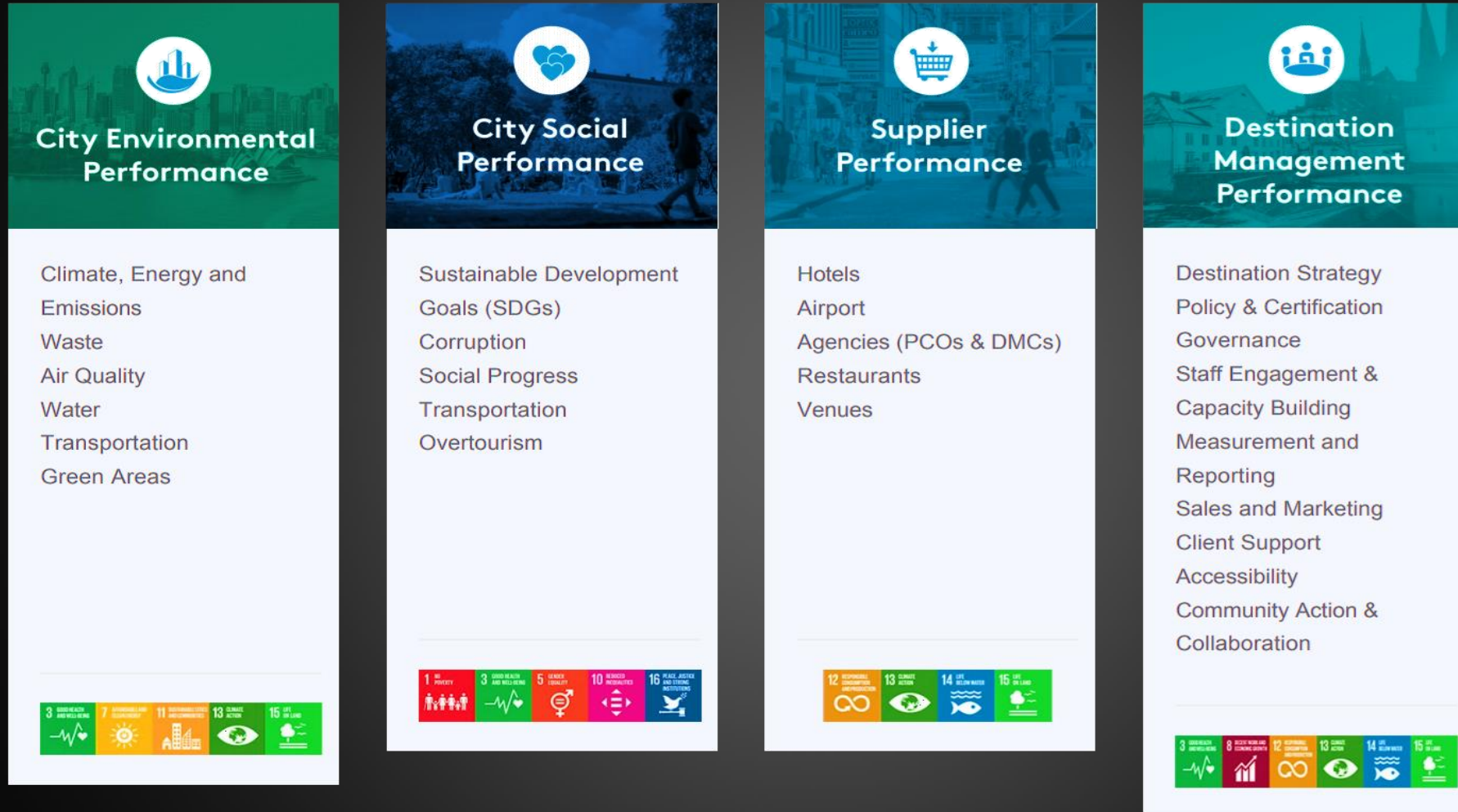
58 cities from 5 continents and growing



➤ The 2016–2018 results have been revised to include a 12% decrease on the original scores. This decrease was applied to improve comparability with the new 2019 criteria.

\* Source : <https://www.gds.earth>

## Development of Global Destination Sustainability Index(GDS-I)



- In 2019, the GDS-I developed and aligned a more demanding set of criteria with other significant stakeholders including the Global Sustainable Tourism Council, the Social Progress Imperative and the Events Industry Council



## Implementation of Global Destination Sustainability Index(GDS-I)

### 8 TACTICS FOR CHANGE

- There is no perfect sustainable destination, yet. However, this "framework" provides a set of recommendations for any DMO or Municipality, that wants to create, or improve their sustainable destination strategy.

1

Integrate The Sustainable Development Goals(SDGs)

2

Footprint And Set Science Based Reduction Targets

3

Engage Strategically With Stakeholders

4

Champion Certification

5

Promote The Food Revolution

6

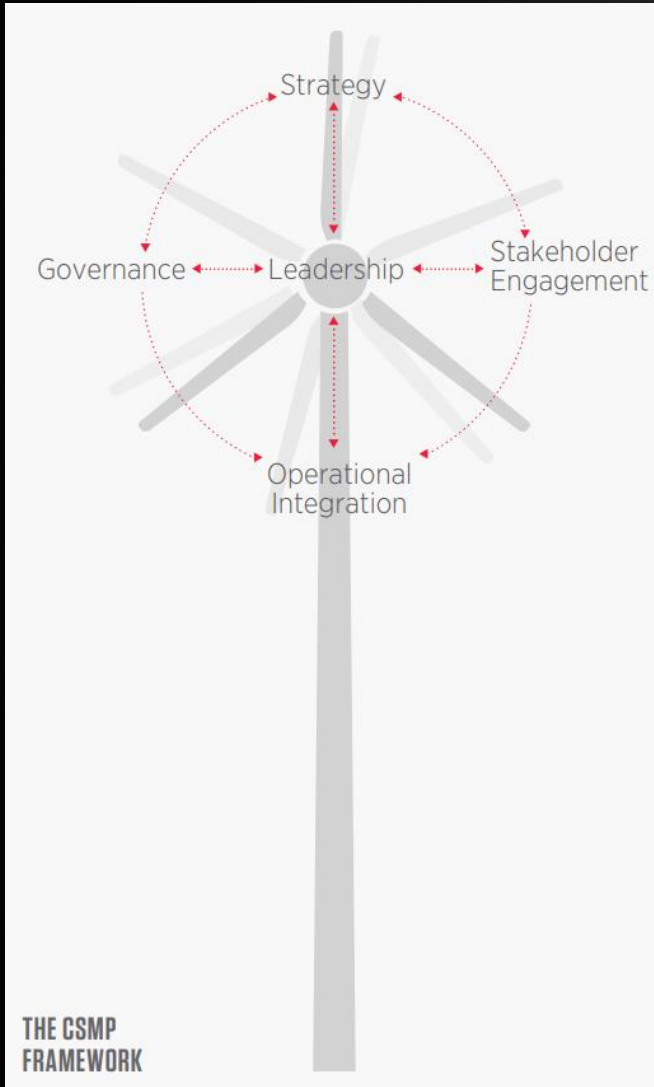
Boost Demand

7

Build An Authentic Story

8

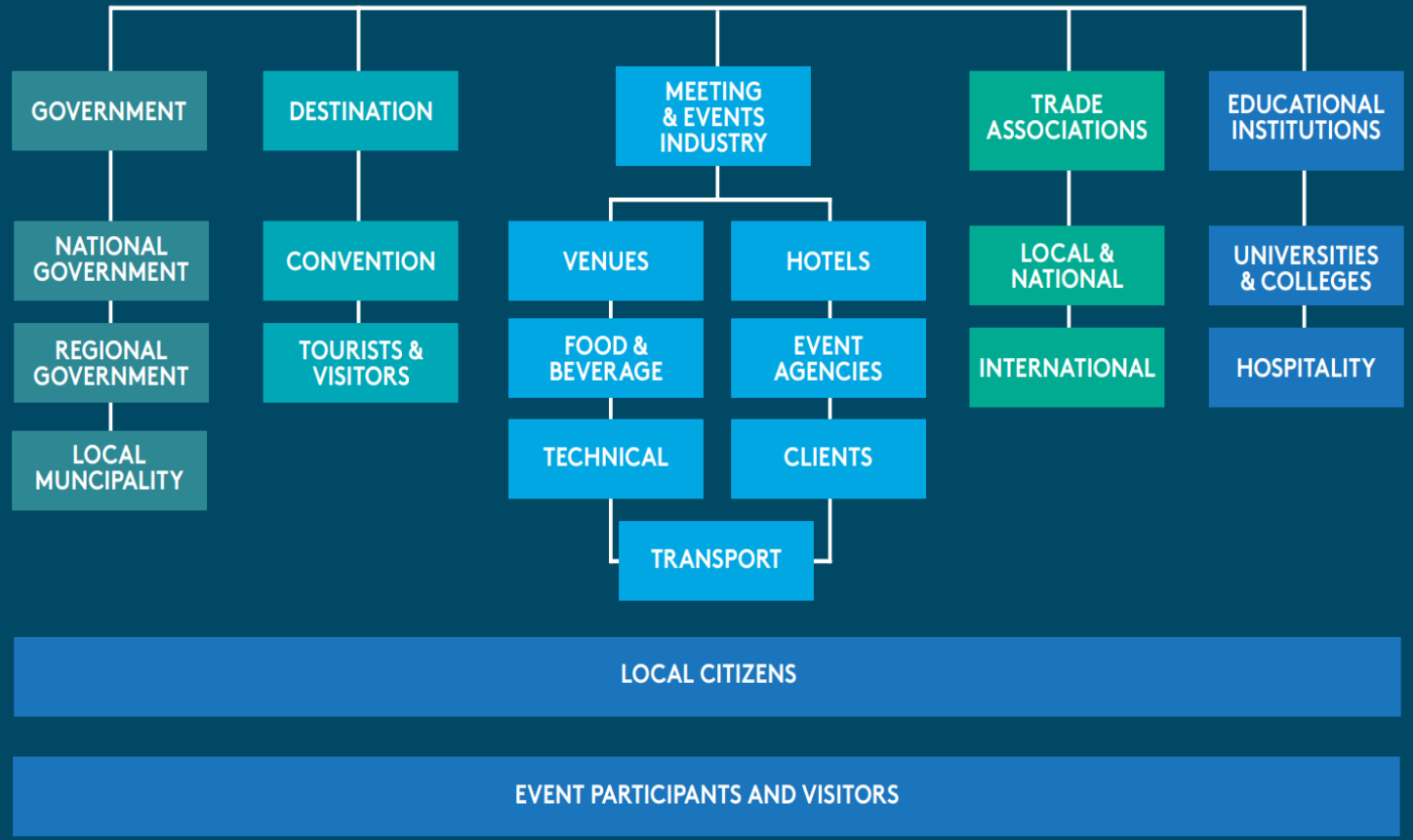
Report Impacts And Actions



# Implementation of Global Destination Sustainability Index(GDS-I)



## MEETINGS AND EVENTS SUSTAINABILITY STAKEHOLDERS



\* Source : <https://www.gds.earth>

## Implementation of Global Destination Sustainability Index(GDS-I)



### GDS-INDEX

Benchmarking  
Awards  
Whitepaper



### GDS-CONSULT

Strategy  
Social Innovation  
Impact Measurement &  
Reporting  
Communications  
Research



### GDS-FORUM

Online and Offline  
Knowledge Sharing And  
Co-creation



### GDS-ACADEMY

Capacity Building  
through Training And  
Coaching



### GDS-CERTIFY

Destination  
Certification Powered  
by Earthcheck

EXTREME COLLABORATION

# Global Destination Sustainability Index(GDS-I) for Goyang(2020)



 GLOBAL  
**DESTINATION  
SUSTAINABILITY**  
INDEX

**BENCHMARKING and IMPROVEMENT REPORT**  
**Prepared for the Goyang Convention & Visitors Bureau**

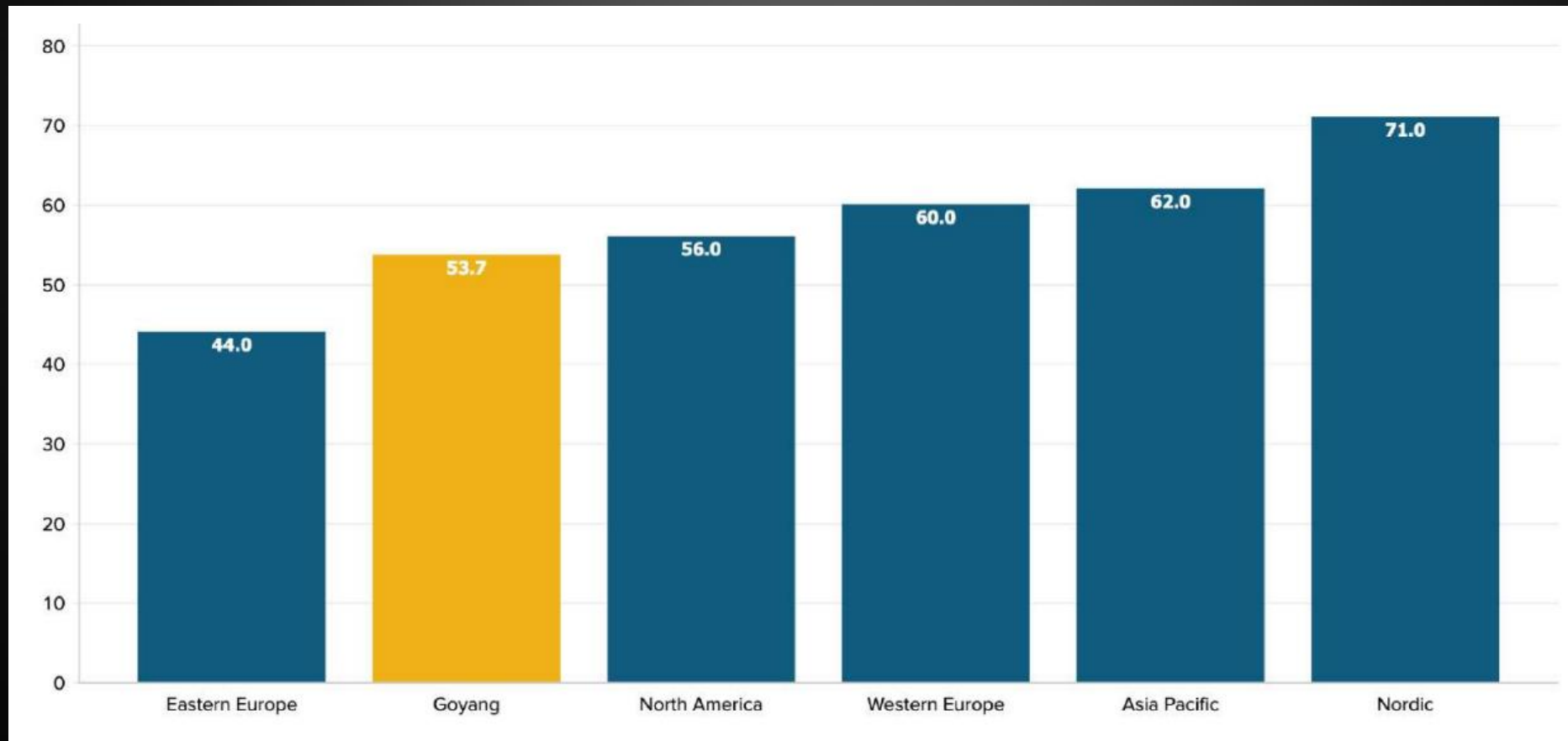
Presentation by Noah Joubert and Guy Bigwood  
6th of February 2020

 **GOYANG CVB**  
Convention & Visitors Bureau

## Result of Global Destination Sustainability Index(GDS-I) for Goyang(2020)

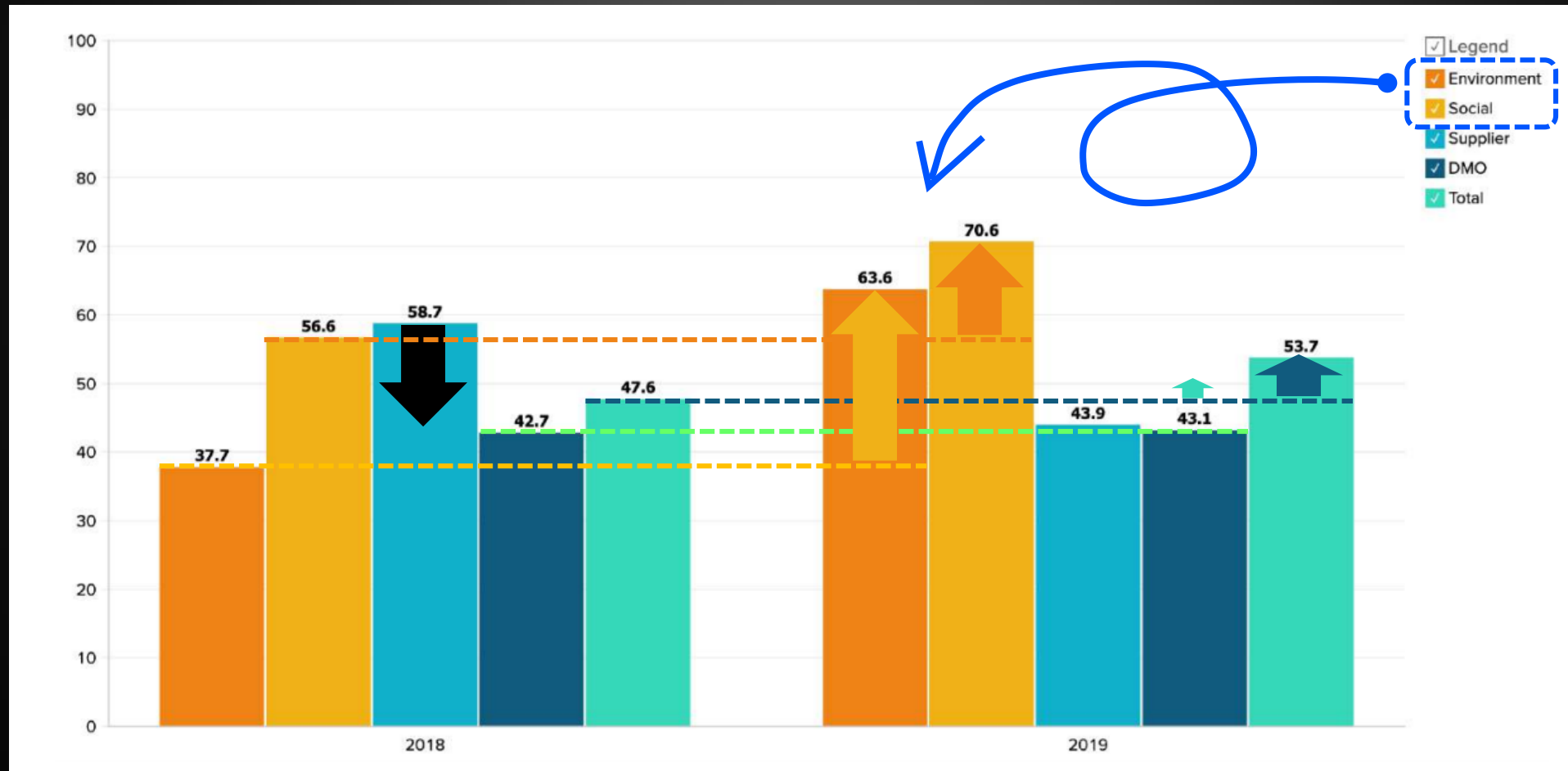
**Goyang is in the 35th position in 2019 (from 32nd in 2018).**

- Goyang performs well against the average total score of Eastern Europe. Compared to all other regions, however, it falls short of their averages.



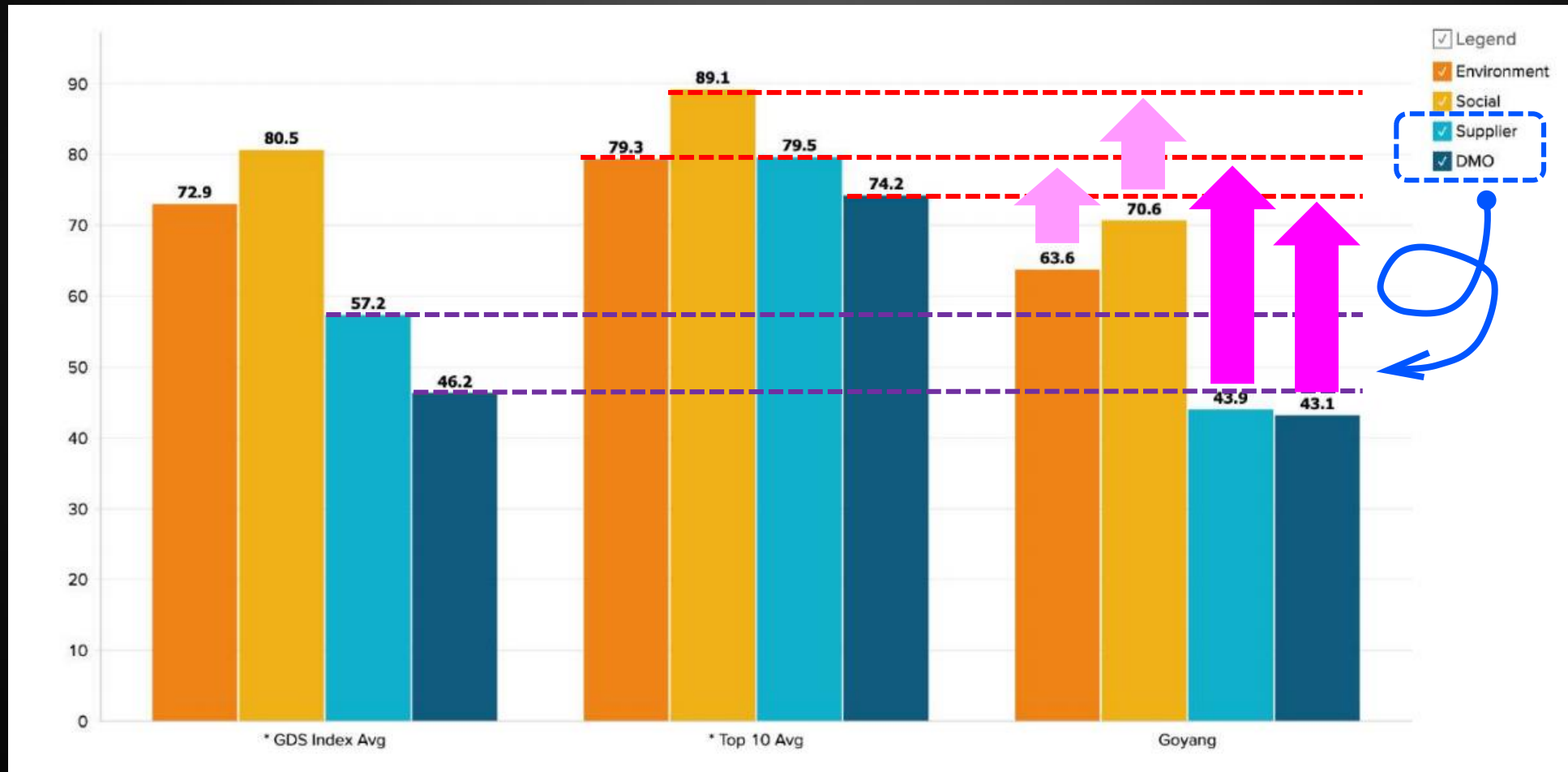
## Result of Global Destination Sustainability Index(GDS-I) for Goyang(2020)

➤ Goyang, while dropping 3 spots in the overall ranking, has still managed to improve upon its performance compared to last year.



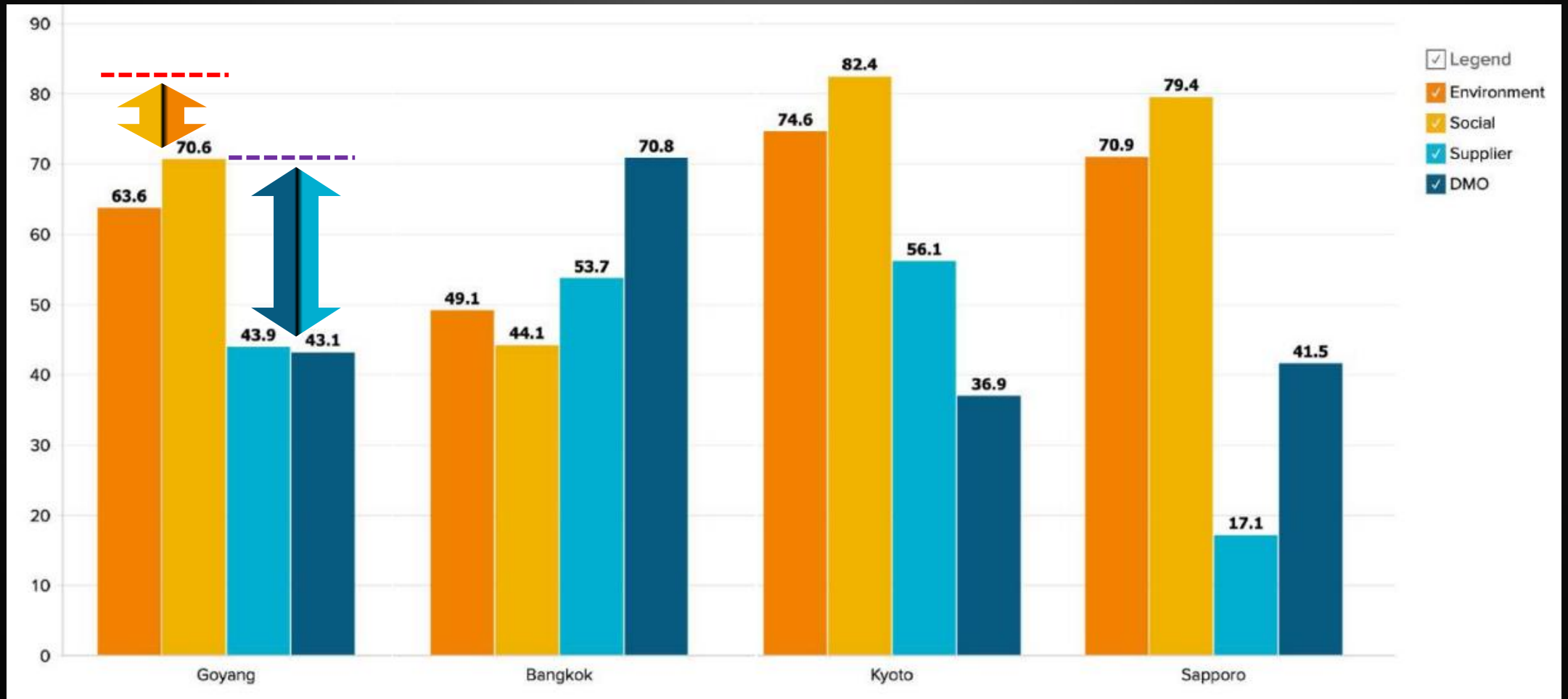
## Analysis #1 : Goyang's GDS-I Performance Against Leaders

- When compared to the GDS-Index average scores, Goyang's 2019 performance almost meets that average.
- Compared to the Top 10 average score, the Supplier and DMO sections need to show the biggest improvement



## Analysis #2 : Goyang's GDS-I Performance Against Regional Destinations

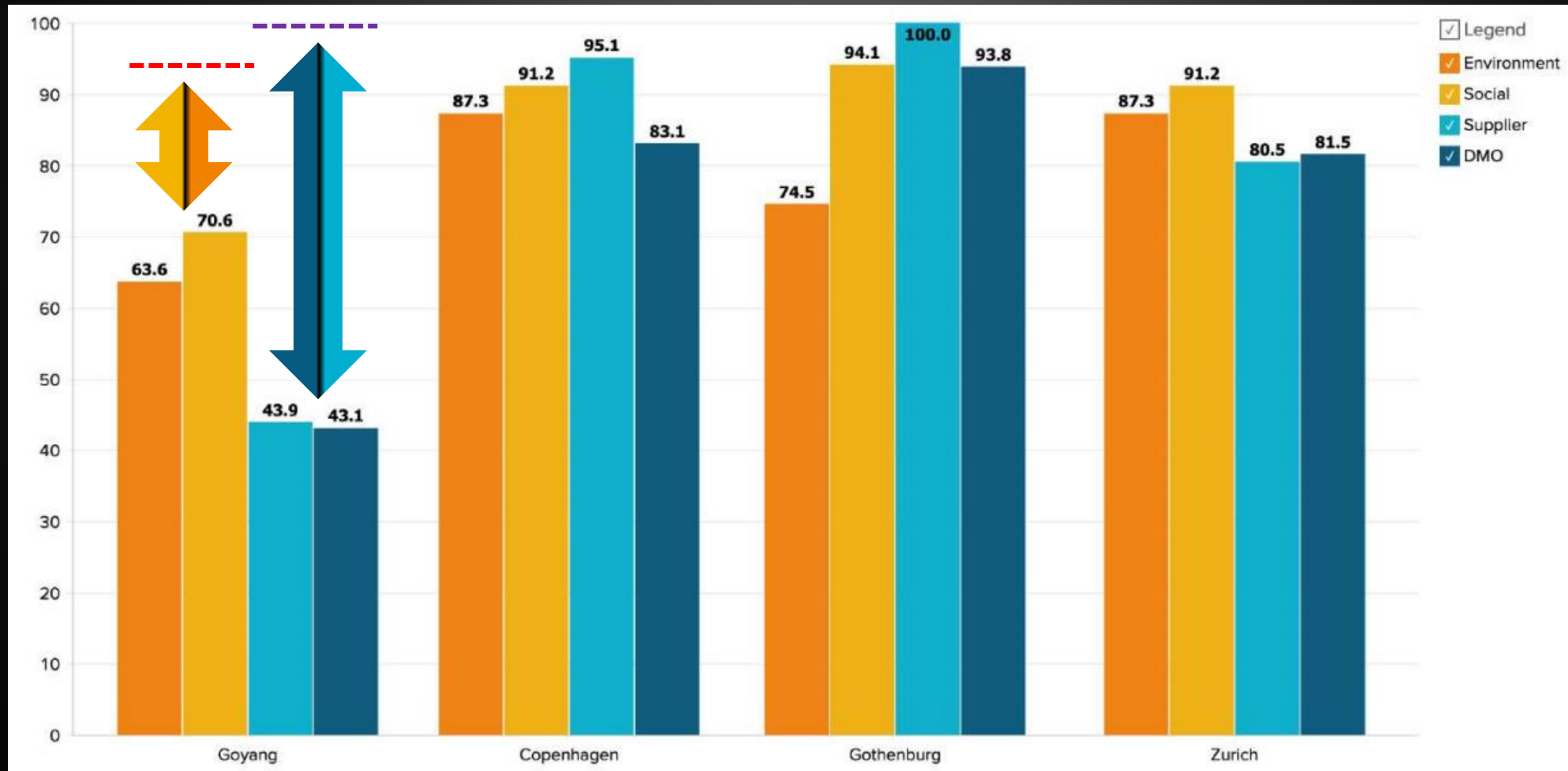
- Goyang's performance is higher than Kyoto for the DMO section, and Bangkok for the environment and social sections.
- However, Goyang's performance is worse than Bangkok's DMO section, Kyoto and Bangkok's Supplier section.





### Analysis #3 : Goyang's GDS-I Performance Against Global Leaders

- When compared with the GDS-Index Top 3 cities, Goyang is at a similar, though lower, social and environmental performance.
  - And Goyang still has a large gap to be overcome for DMO and Supplier sections.



Conclusion & Recommendations


Global Destination Sustainability Strategy for Goyang



**Build your Taskforce**

Build a destination sustainability partnership with key stakeholders

key industry partners, clients, event attendees, and citizens



**Update Strategy**

your task force input to improve your long term vision and SMART Goals

Create sustainable procurement policy and align destination strategy with city goals and SDGs



**Communication**

Measure and report on progress and impact of your SMART goals

Using Website, RFPs Messaging, & Develop best practices/case studies to inform to stakeholders

\* Source : Goyang CVB



3

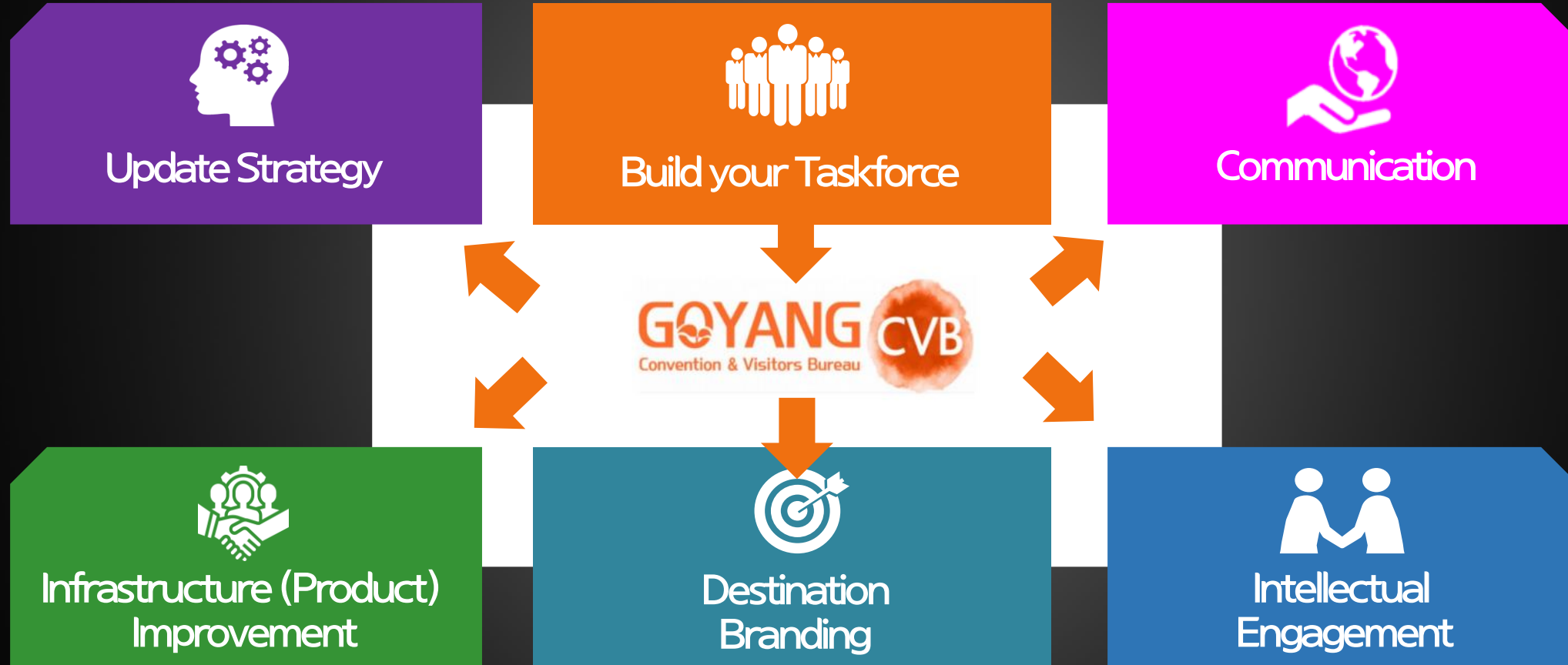
For the Asia Leading MICE Destination,

**Goyang**

## Strategic Framework



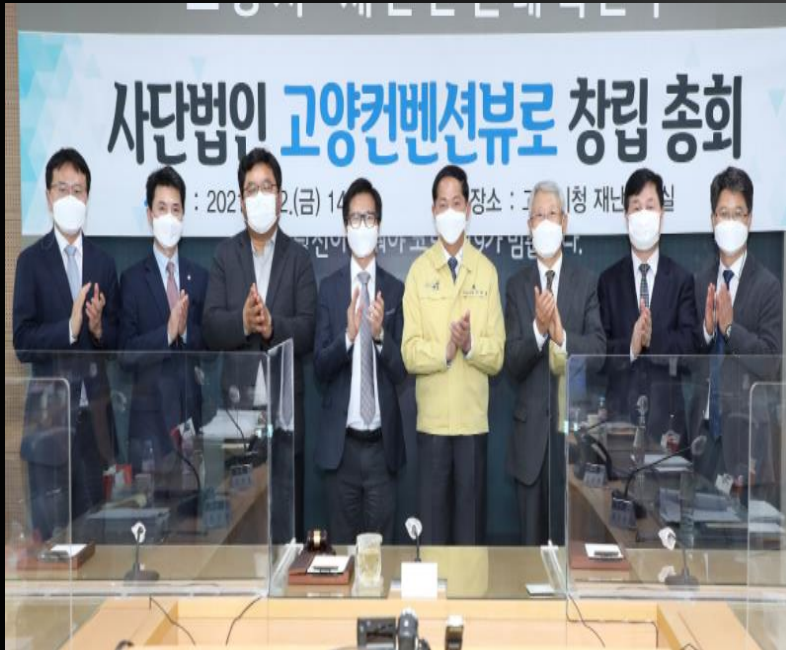
## Developing Internal Competitiveness & Sustainability Program



## Developing Internal Competitiveness & Sustainability Program



Build your Taskforce



# Developing Internal Competitiveness & Sustainability Program



# Developing Internal Competitiveness & Sustainability Program



Communication

2021 고양 데스티네이션 위크  
**GOYANG DESTINATION WEEK 2021**

MICE, 도시를 되살리다!  
 MICE, REBOOT THE CITY!

8월 25일 (수) ~ 26일 (목)

**DAY 1 - 8.25. 수 | 1일차 | 09:00 ~ 17:30 | Hybrid Event**

국제 데스티네이션 경쟁력 포럼 ※ 오프라인 | 컨텍스 제1차(신)그랜드 불룸

<b>09:00</b> Moderator & The City <b>Jeffrey Sachs</b> Professor, Columbia University, MCI Group * 의정부 및 서울 도봉구 후원 공식 행사	<b>09:30</b> 2021 10월 19일 아시아 MICE CEO 2019 <b>Oscar Cereales</b> Chief Strategy Officer, MCI Group	<b>10:00</b> MICE & The City: Legacy & Vision <b>Kai Holtendorf</b> President of 20th Meeting Industry Council(AMIC)	<b>10:30</b> Women 1st & 2nd <b>Sigrun Jungertsted</b> CEO & Founding Partner, Group M&O	<b>11:00</b> MICE & Digital Transformation in MICE <b>김문호</b> i2&S, S&S
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**DAY 2 - 8.26. 목 | 2일차 | 10:00 ~ 17:30 | Virtual Webinar**

ASIA MICE 아시아 데스티네이션 라운드 테이블 MICE & City Competitiveness | GSOM 아시아 래랑양 포럼 GSOM : Global Destination Sustainability Movement

<b>09:00</b> Adding Value to Convention <b>Amelia Rociman</b> CEO, Business Events, Sarawak	<b>09:30</b> Korea MICE <b>Lance Ferguson</b> Assistant Manager, Sales, Convention & Visitors Bureau	<b>10:00</b> The Future We Want <b>Edi Gallopini</b> Director, Enterprise	<b>10:30</b> The Sustainable Destination <b>Gary Bigwood &amp; Noah Joubert</b> Managing Director & Head of Communications, GSOM
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**11:00**  
Destination Building & Planning in Asia  
**Gary Grammer**  
Chairman, Learning Edge

**11:30**  
Partnership in Accelerating  
**Medusa Board**  
Communications, GSOM  
Chairman, GSOM  
General Manager, GSOM  
CEO, MICE IMPACT

※ 자세한 사항은 홈페이지 [GOYANGDESTINATIONWEEK.COM](http://GOYANGDESTINATIONWEEK.COM), [GOYANGDCOF.COM](http://GOYANGDCOF.COM)을 참조해 주시기 바랍니다.

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**GOYANG MICE**

**GOYANG SUSTAINABLE MICE CAPITAL OF KOREA**

고양 마이스 - Goyang MICE @MICEGOYANG

좋아요 공유 ...

메시지 보내기

GOYANG CVB

**고양시 2기 고양시 MICE 전문인력 2기 모인**

**모집대상**

- MICE 산업에 관심이 있는 고양시 거주 중장년 남녀 20명
- \* 서비스업종 경력자, 경력단절여성, 재외국어 가능자 우대

**교육일정**

- 장소 : 고양시 관내 (컨텍스 인근 예정)
- 기간 : 11월 중순부터 주 2회\*3주 (총 6회)
- 내용 : 취업준비 멘토가 들려주는 MICE 산업 개요 및 실무, 서비스 마인드 등
- 비용 : 무료

**모집기간**

2018년 11월 5일 ~ 11월 15일 18:00 마감  
 (지원서 도착시간 기준, 마감 이후 접수분은 받지 않습니다)

**수료혜택**

- 70% 이상 출석자에 한해 아래 혜택 제공
- 교육 수료증 및 임명장 발급
- 고양시 MICE 전문 운영요원 정식 활동 (2019년)
- 고양시 지역특화(컨벤션 및 고양시 개최행사 참여)의 우선 제공
- 능력향상을 위한 지속적 보수교육 진행
- 고양시 MICE 인적자원으로 양성

**합격발표**

2018년 11월 19일 (월) 예정

**문의사항**

고양컨벤션뷰로  
 031-994-8041 / [sophielee@goyangcvb.com](mailto:sophielee@goyangcvb.com)



# Developing Internal Competitiveness & Sustainability Program



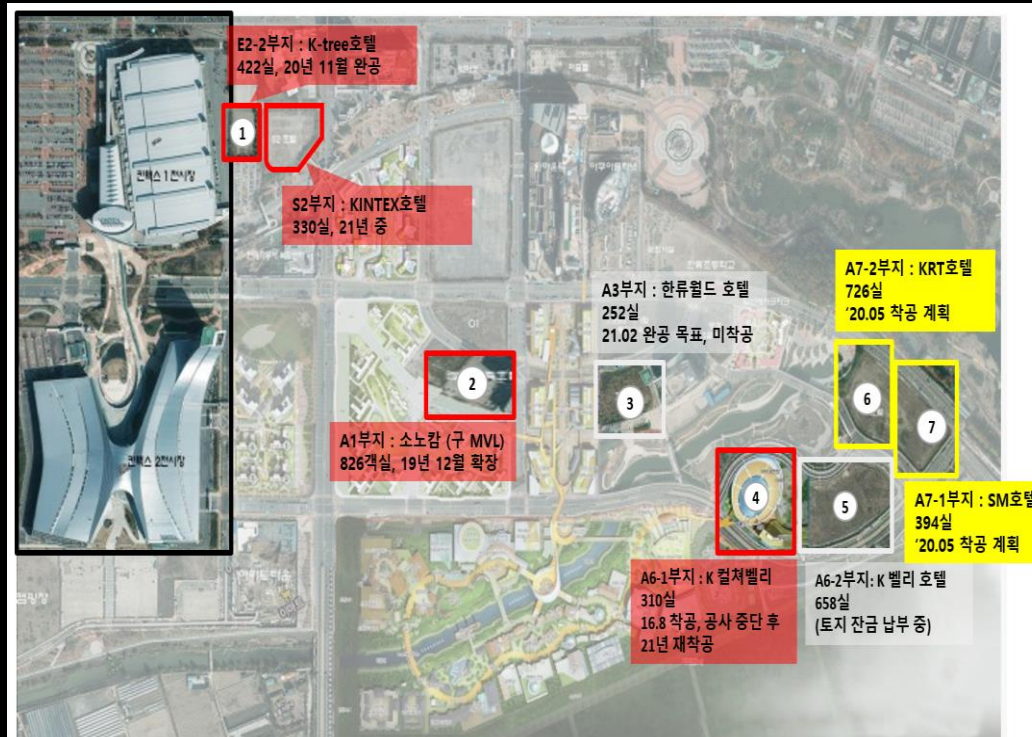
Destination  
Branding



# Developing Internal Competitiveness & Sustainability Program



## Infrastructure (Product) Improvement



\* S2부지 : 다은21이 호텔건립 외투유치(2천만 달러 유치 조건 계약, 2014말~2018말)에 실패, 고양시 계약해지(소송 중)



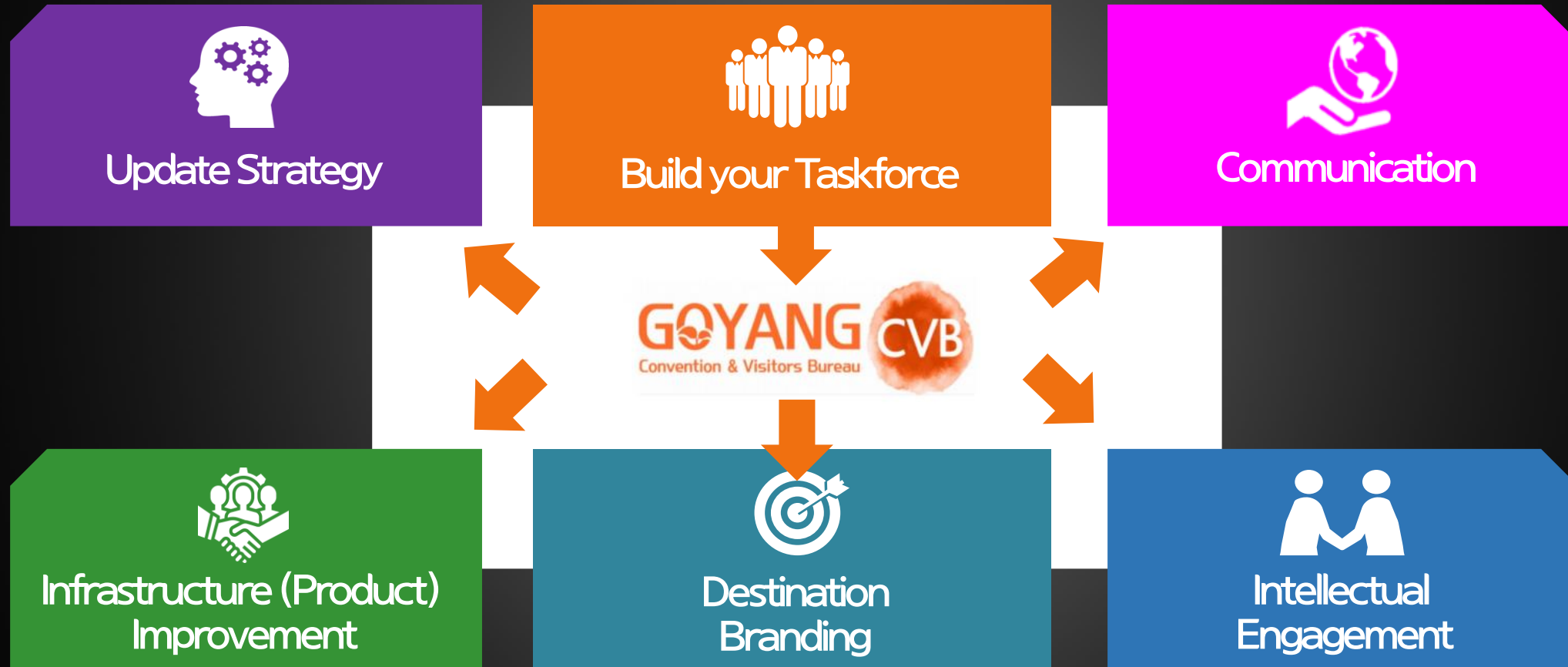
KINTEX 인근 호텔 개발 현황

□ 확정 □ 착공 □ 미착공

부지	호텔명	사업자	대지면적(m <sup>2</sup> )	착공일	준공일	객실 수	성급	동향	
킨텍스 지구	S2	KINTEX호텔	미정	미정	'21년 중	'23~'24	330	비즈니스	3전시장 건립계획 포함
	E2-2	K-TREE	우리하우징㈜	4,053.1	'18년 초	'20.11	422	비즈니스	공사 중
	소 계			30,823.9			752		
한류월드 지구	A1	소노캄2	대명종합건설	6,543.7	'17.08	'19.12	449	특1급	19년 12월 확장. 운영중
	A2	소노캄호텔	대명종합건설	7,139.1	'10.06	'13.08	377	특1급	운영 중
	A3	한류월드호텔	한류월드호텔	10,458.0	'20.06	'21.02	252	특2급	미착공
	A6-1	케이벨리호텔	케이벨리㈜	23,028.4	'16. 08	'20.12	310	특1급	공사 중단, 21년 재착공 예정
	A6-2	케이벨리호텔	케이벨리㈜	24,125.0	'21. 12	미정	658	비즈니스	토지 대금납부 미완료 전금납부까지 기한 남음
	A7-1	SM관광호텔	삼라미디어스	10,157.0	'20. 05	미정	394	비즈니스	SM관광호텔과 KRT호텔 필지 합병, 통합 개발 예정
	A7-2	KRT호텔	케이알티여행사	16,500.0	'20. 05	미정	726	비즈니스	계획은 올 5월 착공이나 변동 가능
소 계						3,166			
총 계			128,775.1			3,918실			

※ A3~A7-2 부지는, 2020년 3월 경기도도시공사 북부판매부에 제출한 사업계획서상의 내용이며, 변동 가능

## Developing Internal Competitiveness & Sustainability Program





Thanks for your attention.



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