

OVERVIEW

Under the Business Events Australia (BEA) brand, Tourism Australia focuses on the association and incentive sectors in North America, recognising that international incentive events and international conferences bring high economic value to Australia. In addition to this benefit, association conferences can drive opportunities for Australia in international collaboration, knowledge exchange, trade and investment and attract thousands of international delegates to Australia every year.

Through an integrated distribution and marketing strategy aimed at inspiring its target customers, BEA raises awareness and consideration of Australia's quality business events product offering and delivery of both association and incentive events. Activity includes brand and content marketing, educational visits, distribution development and engagement events that allow the Australian business events industry to meet with qualified buyers to grow their business.

Tourism Australia also supports the work undertaken by Australian industry in bidding for association events and in securing international delegates for these events.

In 2018, the USA was Australia's second largest inbound market in terms of expenditure and third largest in terms of visitation. In the same period, information based on the International Visitor Survey (IVS) tracked expenditure of AUD800m from 136,000 USA business events arrivals.

For more information on the North American market, visit www.tourism.australia.com/en/markets-and-stats/market-regions/americas.html

For more information on Tourism Australia's business events work and how to get involved, visit www.australia.com/businessesvents

AVIATION UPDATE

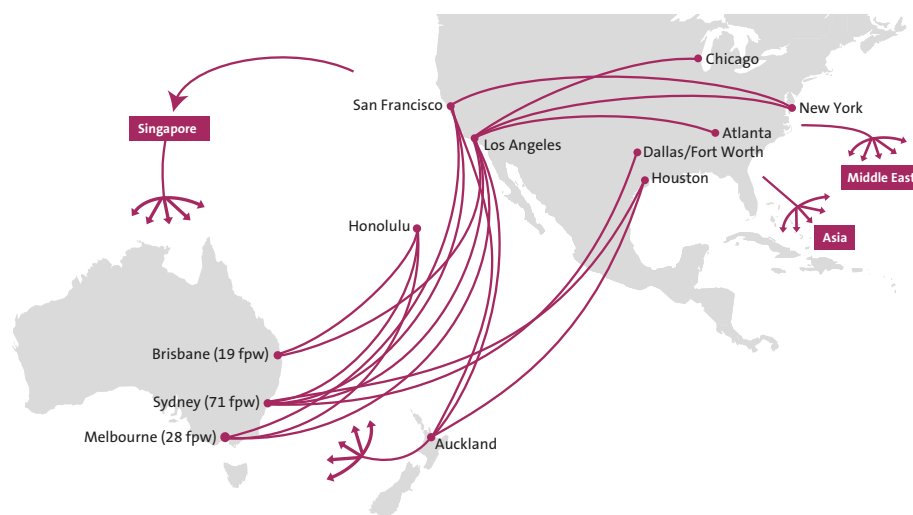
Growth in direct aviation capacity between North America and Australia is a welcome development for the business events customer to Australia. Additional capacity and services, now up to 134 flights per week, is encouraging some of the most competitive pricing ever on these routes.

Qantas now flies San Francisco to Melbourne daily, whilst United Airlines Houston to Sydney flights operate daily during the Australian summer and four times weekly in the Australian winter. New United Airlines San Francisco to Melbourne flights will also commence from October 2019.

The recent launch of Air Canada's services to Australia, (Vancouver to Brisbane, Vancouver to Sydney and Vancouver to Melbourne), is providing the Canadian incentive market with new non-stop direct service options for travel to Australia.

AVIATION ROUTES FROM NORTH AMERICA TO AUSTRALIA¹

FLIGHTS PER WEEK (FPW)



IMPORTANT FACTORS WHEN CHOOSING A BUSINESS EVENTS DESTINATION

A safe and secure destination

A destination that offers value for money

Excellent business event facilities

A range of quality accommodation

Good food and wine, local cuisine and produce

Centrally located convention centres

Strength in specific knowledge sectors relevant to the association

Tourism Australia has undertaken research to understand the path to purchase of international delegates when choosing whether to attend an association event. This information provides a competitive advantage to associations in planning their Australian event and is available at www.tourism.australia.com/statistics

WHICH AIRLINES² DO NORTH AMERICAN VISITORS USE TO TRAVEL TO AUSTRALIA?

Airline	2019
Qantas Airways	26%
United Airlines	16%
Virgin Australia	10%
Air New Zealand	7%
Delta Air Lines	7%
American Airlines	7%
Others	27%

Sources: 1. OAG, data for the week of 8th April 2019
2. Department of Home Affairs, January 2019

BUSINESS EVENT INSIGHTS AND TRENDS – ASSOCIATION EVENTS

- » Whilst decisions on where to host events are led by USA-based associations, the majority of these events require bids to be led by the association chapter or key industry figure based in the proposed host country, ie; the Australian chapter of an international association bids for Australia to host.
- » Working with international associations to secure events is a complex undertaking and requires not just a thorough understanding of the goals and structure of the association, but also the specific bidding process for the particular event. This work can take years to develop and involve multiple partners and activities and the specific expertise of a destination in the relevant knowledge sector of the association – science, technology, medical research, etc – is a key decision factor in securing the bid.
- » Establishing strong relationships is crucial to securing events. Association decision makers, key advocates for a destination and suppliers should all form part of the bid strategy.
- » Event decision makers vary from association to association – some seek recommendations from event planners, others have decisions made by the head of the association, whilst a voting system that can include general membership voting or votes by members of the board, or a select committee can also be used to determine event destinations.
- » Providing associations with an understanding of competitive pricing for hosting an event in Australia, such as, taxes are included in all pricing and gratuities are not required, can further enhance the cost benefit of choosing Australia.
- » Additionally, while North American-based major hotel chains such as IHG, Marriott, Hilton and Hyatt have recently reduced venue commissions to planners, this does not affect properties in Australia – demonstrating an additional value to hosting events outside North America.
- » Associations are looking to expand their global membership with new members, sponsors and exhibitors. It is important to provide information on Australia's expertise in their relevant sector, and how hosting their event in Australia can assist in growing memberships and exhibitors. It is also important to highlight Australia's proximity to Asia, as associations are looking to increase membership and sponsors from this region.
- » Traditionally most associations based in North America operate on a 10-20 year geographical rotation, taking events internationally in a set pattern, ie; Americas then Europe then APAC. However, global safety and security concerns have led to a change in this model. Associations are increasingly choosing destinations based on criteria including economic, political and security conditions rather than traditional rotation models. A continued trend for US-based associations is to organise leadership study missions as a precursor to larger events. This allows them to see a destination in action, visit venues, and meet local hosts. Larger associations may also choose to hold smaller regional events in a destination to test the suitability and feasibility of holding their larger events within that destination.

- » Washington DC and Chicago continue to be traditional key markets for Australia in the associations sector, however Texas, Philadelphia and New York also offer potential.
- » Sydney, Melbourne and Brisbane continue to be the best-known Australian destinations in the North America association market. Cairns and Adelaide are also seeing traction in the market, particularly for smaller-sized events.
- » International associations place great importance on the potential legacy benefits of their event and can request this element be included in a presentation/bid to consider how the destination/suppliers can support this goal.

BUSINESS EVENT INSIGHTS AND TRENDS – INCENTIVES

- » Business events planners in North America (see North America Business Events Distribution System for details) are actively searching for new and inspiring long-haul destinations and Australia continues to be an aspirational incentive destination.
- » North American planners understand the value of convention bureau services and see them as a reliable and unbiased resource when planning incentive itineraries. They will then engage a Destination Management Company (DMC) to deliver the program.
- » Experiencing Australia's natural landscapes via outdoor dining, aquatic experiences, scenic flights, and encountering iconic animals such as koalas and kangaroos are highly appealing activities for the North America market.
- » Incentive programs that offer immersive experiences, such as cultural encounters or wellness activities are becoming more prevalent, taking precedence over Corporate Social Responsibility (CSR) inclusions.
- » Key source industries for North American incentive groups are insurance, finance, IT and automotive.
- » The east coast of Australia, including iconic destinations of Sydney and the Great Barrier Reef, (with Cairns as the gateway for Port Douglas) and The Whitsundays (Hamilton and Hayman Islands) are still the main destinations of choice for the North America incentive market.
- » Incentive trips from North America are becoming shorter in length, with three/four-night stays over weekends gaining in popularity with time-poor and time sensitive delegates.
- » All-inclusive resorts are also popular for North American incentive programs, in destinations such as Mexico and the Caribbean as well as cruising with all-inclusive pricing for groups.
- » New air routes from Canada are driving increased interest in Australia from both planners and corporate end users.

NORTH AMERICA BUSINESS EVENTS DISTRIBUTION SYSTEM

The definition between association and incentive agencies is starting to shift as some agencies in North America start to work in both incentive and association events. Broadly however, the traditional distribution system still applies.

Venue sourcing services such as Cvent are being used more often by planners in the North America market.

Associations market: Associations will often engage a professional conference organiser (PCO) or an association management company (AMC) to assist in the delivery of their event. A PCO will act as a consultant to the association's organising committee to help deliver the event, including management of registrations, marketing and communications, IT and logistics, as well as creating pre and post touring itineraries.

An AMC offers event management but also undertakes extended services including membership administration, strategic and financial planning as well as management and leadership development.

Incentives market: In the North American incentive market, business event planners can be known as incentive houses, conference and incentive agencies, or corporate meeting planners. Some planners are in-house, (within the actual company organising the incentive) with external agencies known as 'third party'. Regardless of this difference, most planners will engage a destination management company (DMC) to deliver the program in Australia, manage the ground arrangements and deliver bespoke incentive experiences.

Professional Conference Organisers (PCO) and Association Management Companies (AMC)

Key PCOs and AMCs in North America include:

- » Conference Direct
- » JPDL (based in Montreal)
- » HelmsBriscoe
- » Kellen Company
- » International Conference Services (ICS) (based in Vancouver)
- » MCI
- » SmithBucklin
- » Talley Management
- » Venue West (based in Vancouver)

Incentive and Corporate Meeting Agencies (includes incentive houses, conference and incentive agencies, corporate meeting planners etc.)

Key agencies in North America include:

- » BI Worldwide
- » BCD Meetings & Events
- » Carlson Wagonlit Travel (CWT)
- » ITA Group
- » Maritz/Experient
- » Meridian
- » Motivaction
- » One10 Marketing
- » Wynford (based in Toronto)

Destination Management Companies (DMC)

Key DMCs active in North America include:

- » AOT
- » Arinex Events
- » Australia Conferences & Incentives
- » Destination Pacific
- » ID Events Australia
- » Ovation Australia
- » Unique Concepts

PLANNING A VISIT TO MARKET

- » Tourism Australia encourages the Australian industry to undertake trips to North America to develop their knowledge of the market and recommends contacting the in-market BEA representatives to gain relevant insights.
- » Allow a minimum of three months prior to travel to start communicating and establishing relationships with key agencies, which are essential to a successful trip. Cold calls and emails are strongly discouraged in this relationship-driven market.
- » North American agencies tend to be more willing to meet and/or attend an event during slower times in their own business. The best time for sales calls is typically from January to April as well as June and July. August to October is a peak time for events, tradeshow, meetings, business travel and holidays, and is not recommended for sales calls.
- » Accredited education sessions, where agents can gain professional credits for their attendance, have greater appeal and attendance than networking drinks, receptions or workshops. Australian industry planning to visit North America are encouraged to research industry organisations such as PCMA (Professional Conference Managers Association), MPI (Meetings Professionals International) and SITE (Society for Incentive Travel Excellence) to understand the opportunities on offer to engage with agents.
- » Tourism Australia suggests Australian industry tailor information on their product offering to the North American market, taking into consideration their knowledge levels about Australia. Educating agents on the product's location in the wider context of the destination, providing details on transport options, travel times, and other logistics as well as the specific product experience and suggested itineraries are highly recommended.

KEY BUSINESS EVENTS DISTRIBUTION ACTIVITY

Event	Location	Date
BEA Roadshow	Three USA cities	15 July 2019
IMEX America	Las Vegas	10 – 12 September 2019
IMEX America	Las Vegas	15 – 17 September 2020

The Business Events Australia (BEA) USA Roadshow is a new event for the North America market, designed to showcase Australian business events destinations and product. The Roadshow will assist Australian industry to meet with qualified USA based association, corporate meeting and incentive planners to raise awareness and consideration of Australia as a business events destination.

IMEX America is a key business events trade show, which attracts both association and incentive planners and decision makers, as well as PCOs and AMCs. The show offers the chance to meet during scheduled appointments with qualified buyers, as well as networking opportunities during which relationships can be developed.

Other activity in market throughout the year includes sales calls, training events, and attendance at accredited events via organisations such as PCMA, SITE and MPI.

As part of its distribution development activity, Tourism Australia also conducts educational visits to Australia from the North America market.

For more information on any of these trade activities, contact bea@tourism.australia.com

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For more information please visit

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