STATE OF THE BUSINESS EVENTS INDUSTRY 2010

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Executive Summary

The purpose of this report is to provide an overview of how Australia's business events sector performed in 2010 and the factors that affected this performance. It is intended that this report be produced annually and a table containing Key Performance Indicators (KPIs) has been included to help compare performance over time.

In late 2010, Tourism Australia released the '2020 Tourism Industry Potential' that seeks to ensure that Australia's tourism industry doubles its contribution to the Australian economy by 2020. Business Events Australia and the Business Events Council of Australia (BECA) have fully endorsed this strategy and have joined forces to help ensure that the contribution of the Business Events Sector to the Australian economy increases from the current delegate visitor expenditure of $8.4b to $16b by 2020. This annual report will help monitor the performance of business events in meeting this target.

Although the global economy recovered during 2010 after the serious economic downturn caused by the Global Financial Crisis (GFC), this recovery was patchy and much slower than hoped for in many economies. In a similar fashion, the international business events sector demonstrated quite strong recovery in 2010 after very poor performance in 2009 when it was seriously impacted by cutbacks in business travel.

The Australian economy was less affected by the GFC and most of its economic indicators rebounded quite strongly in 2010. The fact that the Australian dollar appreciated against leading currencies during 2010 posed serious challenges for inbound tourism and business events. This contributed to the further widening of the 'business events deficit' with the number of Australians going overseas to attend a conference or convention being some 25% higher than the number of internationals coming to Australia for the same purpose.

Whilst New Zealand continues to be Australia's major source market for international conference and convention attendees, the number of arrivals from New Zealand shrank during 2010 whilst numbers from all other source markets increased.

According to TRA (2011), the total expenditure generated in 2010 by international, domestic overnight and domestic day business events attendees was $8.5 billion, which was 7% above the result in 2009 but was still 12% down on the 2008 figure. Expenditure in Australia of international business events attendees grew by 16% over the previous year and expenditure by domestic overnight business events attendees increased by 5%; domestic day business events attendees fell by 1% compared to 2009. It should be noted that the TRA figures do not include local attendees who travel less than 50 kilometres or stay less than four hours.

During 2010, Australia's ranking for hosting international association meetings for both ICCA and UIA climbed sharply due largely to the increased hosting performance of Sydney. Australia was ranked 11th by ICCA and 12th by UIA. In terms of city rankings, ICCA listed Sydney as 10th and Melbourne as 40th, whilst UIA ranked these two cities as 14th and 20th respectively. Within the Asia Pacific region, Australia was ranked 3rd by ICCA and 4th by UIA.

In Australia's incentive market, performance in 2010 was much improved over 2009 in terms of both visitors and visitor nights (TRA 2011). Of serious concern, however, was the fact that the total yield from the incentive market was down by 19% with expenditure per visitor night being well down for both the international and domestic markets.

Australia's business meetings in 2010 were above the levels achieved in 2009 but the increase was not sufficient to recover all of the ground lost compared to 2008.

In relation to the exhibition sector, the overall performance in 2010 exceeded that of 2009 and was not too far short of the performance achieved in 2008. Although the expenditures of international exhibition attendees and domestic day attendees both fell below 2009 figures, the expenditure of domestic overnight exhibition attendees was 25% above the result achieved in 2009.

Whilst the tourism value of business events is seen as very important, substantial progress was made during 2010 in recognising the significant 'beyond tourism' value of business events, particularly in relation to their roles in knowledge and innovation creation and dissemination. BECA produced a discussion paper on this issue and studies were undertaken by the Melbourne Convention and Visitors Bureau and Business Events Sydney attempting to quantify the 'beyond tourism' benefits.

Communications technology continues to advance and is being used to enhance the meeting experience and to extend the audiences, although there are indications that some smaller corporate meetings have been replaced by technology. With growing concerns about the cost of business travel and the carbon footprint that is generated along with further advances in communications technology, it is very important for the business events sector to be acutely aware of the implications of technology.

The KPIs are presented below.

Key Performance Indicator (KPI)	2009	2010
Australia's international ranking in the ICCA Report for International Association Meetings	16	11
Australia's competitive ranking in the Asia Pacific in the ICCA Report for International Association Meetings	4	3
Australia's ranking in the UIA Report for International Association Meetings	15	12
Australia's annual growth in participant numbers in the ICCA Report	-3%	72%
Australia's ranking in Asia Pacific in the UIA Report for International Association Meetings	4	4
Australia's market share in the UIA Report for International Association Meetings (A + B Meetings).	2%	3.2%
ABS Convention / Conference arrivals to Australia	145,400	173,50

Key Performance Indicator (KPI)	2009	2010
Federal funding of business events	$4 million incl $1 million stimulus all via Tourism Australia	$3 million per annum via Tourism Australia
International business event visitors (IVS)	758K[1]	820K[2]
International business event visitor trip nights (IVS)	11,833K[1]	12,759K[2]
International business event visitor spend in Australia (IVS)	1,743M[1]	2,022M[2]
Domestic overnight business event visitors (NVS)	7,826K[1]	8,118K[2]
Domestic overnight business event visitor nights (NVS)	21,596K[1]	23,515K[2]
Domestic overnight business event visitor spend (NVS)	5,397M[1]	5,668M[2]
Domestic day business event visitors (NVS)	7,393K[1]	8,175K[2]
Domestic day business event visitor spend (NVS)	775M[1]	771M[2]
Total business event visitors	15,977K[1]	17,113K[2]
Total business event visitor nights	33,429K[1]	36,274K[2]
Total business event visitor spend in Australia	7,915M[1]	8,460M[2]
State government funding of convention bureaux	22.0M[1]	22.1M[2]
Local government funding of convention bureaux	2.5M[1]	3.3M[2]
Total cash provided to convention bureau by the private sector	9.6M[1]	9.8M[2]
Total number of members of convention bureau	1,592[1]	1,845[2]
Total number of convention bureau bids won	486[1]	640[2]
Total estimated delegate expenditure from bids won	594M[1]	604M[2]
Total number of convention bureau bids lost	375[1]	369[2]
Australia's rank in the list of Overall Country Brand	4	2
Australia's rank in the Ahnolt-GFK Nation Brand	9	9
Accredited meeting managers (MEA) – including in-house managers	50	62

Note 1: Refer to financial year 2008-09
Note 2: Refer to financial year 2009-10

State of the Australian Business Events Industry Report for Calendar Year 2010

1.0 Introduction

The purpose of this report is to provide an overview of how Australia's business events sector performed in 2010 and the factors that affected this performance. It is intended that this report be produced annually and a table containing Key Performance Indicators (KPIs) has been included to help compare performance over time.

The report first provides a brief overview of trends on the international scene before presenting a snapshot of the Australian economy and business events sector. The subsequent sections then examine the performance in 2010 of individual components of business events prior to briefly discussing some key trends.

In late 2010, Tourism Australia released the '2020 Tourism Industry Potential' that seeks to ensure that Australia's tourism industry doubles its contribution to the Australian economy by 2020. Business Events Australia and the Business Events Council of Australia have fully endorsed this strategy and have joined forces to help ensure that the contribution of the Business Events Sector to the Australian economy increases from the current delegate visitor expenditure of $8.4b to $16b by 2020. This annual report will help monitor the performance of business events in meeting this target.

2.0 Global Overview

2.1 Global Economy

After the full effects of the Global Financial Crisis (GFC) were realised in 2009 and substantive action taken by many countries to address the debt crisis, 2010 was expected to be a year of recovery. Whilst the global economy improved in 2010 with most countries moving out of recession, the recovery was slower than anticipated and uneven across the globe. Economies in the Asia Pacific returned to growth quite quickly, but many more developed economies, especially in Europe and America continued to experience serious problems associated with high levels of national debt, high unemployment rates and low consumer confidence. Early signs of political instability in a number of countries in the Middle East put a further dampener on consumer confidence.

According to the UNWTO (2011), international tourism recovered strongly in 2010 with international tourist arrivals 6.6% above the figures for 2009. International tourism receipts increased 4.7% over 2009 and tourism's direct contribution to GDP increased by 3.3%. Like the global economy, international tourism recovery in 2010 was not uniform with best recovery being experienced in emerging economies.

2.2 Global Meetings Industry

The global meetings industry recovered quite strongly in 2010 over its fairly dismal performance in 2009. Importantly, recovery occurred across all sectors of the meetings industry (conferences & conventions, corporate meetings, incentives and exhibitions), although it appears that corporate meetings accounted for the largest increase (Eventia 2011). This is not surprising given that corporate meetings experienced the sharpest decline during the GFC of all forms of business events. Conferences and conventions organised by Associations are much less susceptible to economic conditions than other categories of business events.

Whilst the numbers of most types of events have returned to pre-GFC days, clients are more cost sensitive and "want venues that are fit for purpose rather than those that impress" (Grass Roots 2011, 7). According to Advito (2011), the increase in meeting bookings placed in 2010 was offset by a fall in meeting participant spend. In the UK, the overall value of the UK business events market fell by 13% in 2010 even though the number of meetings held was constant largely due to there being a larger proportion of non-residential events (Eventia 2011).

There has also been a continuing trend of reduced booking times for business events and although the number of events has increased over the previous year, the attendance per event has fallen in many areas (Benchmark Hospitality International's Top Meeting Trends for 2010).

During the GFC, there was substantial pressure put on companies to reduce their travel expenditures and this clearly had an adverse impact on business events, particularly corporate meetings. This downturn was experienced most seriously in the USA where President Obama was particularly negative about the need for business travel. In 2009 and 2010, the meetings industry commissioned a number of reports that were able to demonstrate the substantial economic benefits that meetings can generate and the fact that the sector should be seen as part of the solution, not the problem. This helped alleviate some of the business travel restrictions that had applied in 2009.

The Icelandic volcano eruption in April 2010 created havoc for the travel - and travel plans - of many people and posed major problems for leisure and business travel including business events. The eruption is estimated to have cost airlines $2 billion in lost revenue and resulted in 21 countries across Europe being forced to close their airports. During the peak of this crisis, the International Air Transport Association estimated that 29% of global aviation was impacted. ICCA members reported that 44% of meetings in which they were involved during this period were cancelled and 46% said meetings were postponed.

The technology that facilitates virtual meetings is advancing at a rapid pace and there is much debate about the impact that this has had on the international meetings sector and its likely future impact. Whilst it appears that communications technology has been used to replace some of the smaller corporate meetings, this does not appear to have had much impact on conferences and conventions to date. Technology is being used to extend meeting audiences and to leverage the meeting experience rather than replace conferences and conventions; technology is increasingly being integrated into conferences and conventions.

In the recovery from the GFC, there is increasing interest amongst event organisers to ensure that they and their delegates get an acceptable return on their investment. As a consequence, more effort is now being put into setting clear objectives for meetings and then assessing success in achieving these objectives (FutureWatch 2011).

A major study entitled "The Economic Significance of Meetings to the US Economy" was completed in 2010 by Price Waterhouse on behalf of the Convention Industry Council. The key findings of this study were that "meetings generate 250 million overnight stays by 117 million Americans and 5 million international attendees. They generate $263 billion in spending, directly support 1.7 million jobs, make a $106 billion contribution to GDP and generate $25.6 billion in tax revenue". On a per capita basis, it is interesting to note that many of these key figures are broadly consistent with the figures obtained for the economic contribution of business events to the Australian economy via the National Business Events Study (2005).

2.2.1 Associations

Internationally, the total number of association meetings held in 2010 increased by 10% to 9,120 whilst the average number of participants per meeting decreased by 6% to 571. Due to the increased number of events held in 2010, total participant numbers for the year increased by nearly 147,000 over the previous year. According to ICCA (2010), the leading countries for hosting international association meetings were USA (623), Germany (542), Spain (451) and UK (399). Similarly, the cities identified by ICCA as hosting the most international association meetings in 2010 were Vienna (154), Barcelona (148), Paris (147) and Berlin (138).

As can be seen from the ICCA data presented in Table 1, the most frequent venue for staging association meetings was hotels followed by conference and exhibition centres.

Table 1: Congress Venues Used

Type of Congress Venue	Number of meetings	%
Meeting facilities in hotels	2236	43.1%
Conference/exhibition centre	1367	26.3%
University	1098	21.1%
Other	491	9.5%
Total	5192	100.0%

Source: ICCA 2010

In relation to the subjects for international association meetings, ICCA data indicate that medical science (18%) was the most common, increasing its market share and followed by technology (15%), science (13%), industry (7%) and education (6%).

2.2.2 Exhibitions

Whilst the Grass Roots Report (2011) indicated that there had been quite a strong recovery in the global exhibition sector during 2010 with many exhibitions getting back to the 2008 results, CEIR (2011) suggests that for the Exhibition Industry in America, performance only showed signs of recovery in the third quarter of 2010. UFI (2011) indicates that its member venue capacity in the Asia Pacific region has increased by nearly 50% since 2006 compared to average increases of only 10% for other regions. Much of this increase in capacity has occurred in China.

2.2.3 Incentives

The incentive market internationally is growing with an increasing proportion of corporate clients utilising travel within their incentive packages and looking for exclusive experiences (Grass Roots 2011).

According to Advito (2011), the average number of nights of incentive packages has fallen from 6.5 to 4 over the last year and there has been increased pressure for trips to be less extravagant. A more common component of the incentive package is a project that supports a local charity or community, particularly for American groups.

3.0 Australian Overview

3.1 Economy

The Australian economy weathered the GFC more easily than the USA and Europe. Australia's performance was underpinned by the relative strength and stability of its banking sector, the government's fiscal stimulus package and strong demand for its commodities, especially from China. According to the WEF (2011), Australia maintained its global competiveness ranking at 16 and the report suggests that to improve further in these ratings, Australia will need to "increase the sophistication of its businesses and strengthen its innovation capacity".

In 2010, Australia's real GDP grew at about 2.7% and unemployment fell to 5.1%. The table below provides a summary of the real GDP growth rates for some of Australia's key inbound markets.

Table 2: Real GDP Growth Rates for 2010

Country	Real GDP Growth Rate
China	10.3%
USA	2.8%
Australia	2.7%
UK	2.3%
New Zealand	1.5%

Reflecting the strength of the resource boom, the Australian dollar has gained value against most currencies posing challenges for Australia's export industries and inbound tourism.

Table 3: AUD Exchange Rates

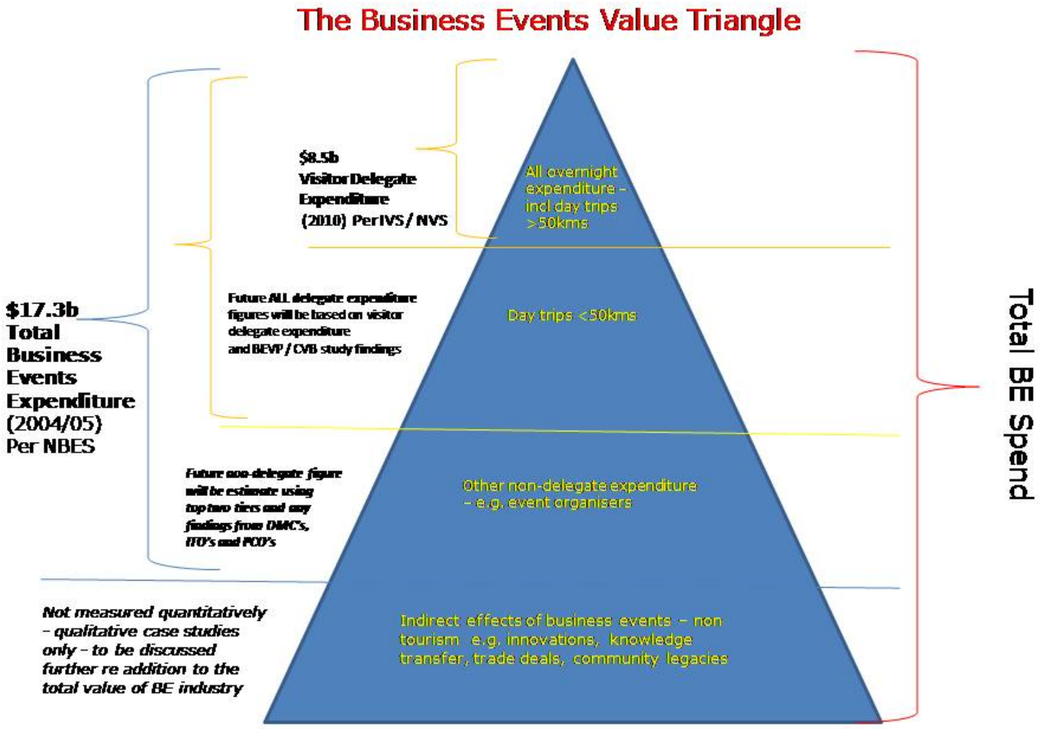
Date	USD	Pound Sterling	Euro	NZ	China CNY
1 January 2010	0.90	0.56	0.62	1.26	6.13
31 December 2010	1.02	0.66	0.76	1.32	6.76

During 2010, the Australian hotel industry recorded one of the highest occupancy rates and RevPAR increases in the world. In the year to June 2010, the average occupancy rate in Australia was 73% (up 4.7%) and RevPAR was up 34.8% (Grass Roots 2011).

3.2 Business Events

In order to overcome the confusion caused by inconsistencies in the terminology used to estimate the economic value of business events, industry and government came together in early 2011 to produce the 'Business Events Value Triangle' presented in Figure 1 below. This figure highlights the difference between the visitor expenditure contribution estimated by Tourism Research Australia (TRA) that relates to tourism and day tripper definitions and the broader value of business events that includes expenditure made by local attendees and event organisers. It is important to note that although TRA includes day tripper expenditure in its estimates, to be included as a day tripper, one must have travelled at least 50 kilometres and have been away for at least four hours. Clearly, this definition excludes many local people who attend business events.

Figure 1 The Business Events Value Triangle



3.2.1 Total Value of Business Events

Internationally, the value of a business event has long been assessed as the expenditure that is generated in the host region by visitors coming to the region to attend the event. However, this approach grossly understates the contribution made by business events as it ignores the value that delegates and employers derive from event participation and the flow on benefits that are derived by the host destination. A report released by BECA in early 2010 (Jago and Deery 2010) examined the important role of business events in the creation and dissemination of knowledge and innovation and acted as a catalyst for further studies in this area. The *Melbourne Convention and Visitors Bureau* and *Business Events Sydney* have both undertaken studies to examine the longer term benefits of business events.

These studies, along with the Return on Investment (ROI) studies that are now being undertaken more frequently on event attendees seek to identify and quantify the 'beyond tourism benefits' of business events that form the bottom segment in Figure 1. Whilst these benefits are much more difficult to quantify than the traditional tourism measures, they are now recognised as being of fundamental importance and bigger in scale than the tourism benefits.

3.2.2 Tourism Measures of Business Events Performance

Over the last two years, supplementary questions relating to business events have been added to the International Visitor Survey (IVS) and National Visitor Survey (NVS) that are managed by TRA. These supplementary questions have provided additional data to more effectively understand the visitation performance of Australia's business events sector. The following table presents a summary of the TRA data that indicates the performance of the sector over the last three years.

Table 4 provides details of business events activity between 2008 and 2010 using the International Visitor Survey and National Visitor Survey data on visitor numbers, nights' stay and spend.

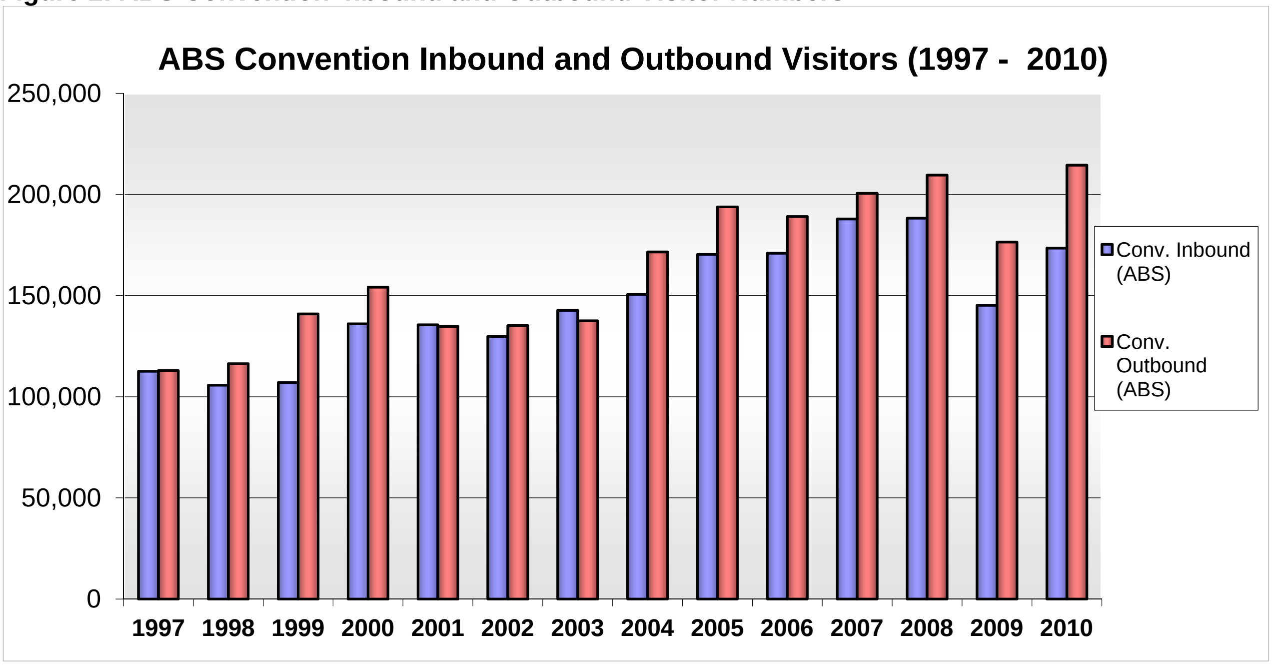
Table 4: Results from Tourism Research Australia's International Visitor Survey and National Visitor Survey: Business Events – visitors, nights and spend

Visitor Type / Event type	Visitors ('000) 2008	2009	2010	% Share	% Ch	Trip nights ('000) 2008	2009	2010	% Share	% Ch	Spend in Australia ($ million) 2008	2009	2010	% Share	% Ch
International[a]															
Conference/convention/seminar	307	230	293	36	27%	4 995	3 654	4 540	36	24%	732	537	694	34	29%
Trade fair/exhibition	59	38	45	5	17%	1 627	1 381	1 369	11	-1%	244	199	171	8	-14%
Incentive[b]	49	34	39	5	17%	334	267	317	2	19%	57	55	55	3	2%
Business meeting[c]	548	525	532	65	1%	8 322	8 119	8 150	64	0%	1 314	1 199	1 382	68	15%
Total[d]	868	758	820	100	8%	13 242	11 833	12 759	100	8%	1 987	1 743	2 022	100	16%
Domestic overnight															
Conference/convention/seminar	2 451	1 987	2 202	27	11%	7 697	6 429	6 688	28	4%	2 160	1 466	1 653	29	13%
Trade fair/exhibition	473	399	475	6	19%	1 748	1 337	1 856	8	39%	434	362	454	8	25%
Incentive[e]	191	170	175	2	3%	616	463	461	2	0%	131	120	85	1	-29%
Business meeting[c]	6 945	5 899	5 967	74	1%	18 624	15 274	16 690	71	9%	5 001	3 953	4 000	71	1%
Total[d]	9 211	7 826	8 118	100	4%	25 735	21 596	23 515	100	9%	6 901	5 397	5 668	100	5%
Domestic day															
Conference/convention/seminar	1 956	1 835	1 817	22	-1%						189	199	145	19	-27%
Trade fair/exhibition	908	1 018	1 062	13	4%						103	119	105	14	-12%
Business meeting[c]	4 775	4 806	5 460	67	14%						529	474	546	71	15%
Total[d]	7 424	7 393	8 175	100	11%						779	775	771	100	-1%
All															
Conference/convention/seminar	4 714	4 052	4 312	25	6%	12 692	10 083	11 228	31	11%	3 082	2 202	2 492	29	13%
Trade fair/exhibition	1 440	1 456	1 582	9	9%	3 375	2 718	3 225	9	19%	782	680	730	9	7%
Incentive[b]	240	204	214	1	5%	950	730	778	2	7%	188	174	140	2	-19%
Business meeting[c]	12 268	11 230	11 959	70	6%	26 946	23 393	24 840	68	6%	6 844	5 626	5 928	70	5%
Total[d]	17 503	15 977	17 113	100	7%	38 977	33 429	36 274	100	9%	9 667	7 915	8 460	100	7%

(a) Excludes visitors to Australia for the purpose of education.
(b) International incentive visitors are those who visited as part of a job related reward or bonus provided by their employer for performance or sales and travelled with business associates and/or on a group tour (excluding
sporting tours, guided holiday tours and school excursions).
(c) Includes some visitors who attended business meetings that would not classify as Business Events. Visitors who attended Business Event specific meetings cannot be separately identified in the available survey data.
(d) Components may not add to total as visitors may have attended more than one type of event.
(e) Domestic overnight incentive visitors are those who visited as part of a job related reward or bonus provided by their employer for performance or sales and travelled with business associates.

As can be seen in Figure 2 below, the business events visitor deficit further increased in 2010 with many more Australians going overseas to attend a conference or convention than there were visitors coming to Australia for the same purpose. This negative gap has been widening since 2003 and is likely being exacerbated by the current strength of the Australian dollar.

Figure 2: ABS Convention Inbound and Outbound Visitor Numbers



Graph: BECA, 2011 (based on ABS statistics)

During the GFC, Australia's business event sector experienced a serious set back with the visitor related expenditure of the sector falling 18% in 2009 to $7.9 billion. TRA (2011) indicates that the sector recovered about a third of this loss during 2010 with visitor related expenditure rising to $8.5 billion. The recovery in the first half of 2010 was slow but in the second half of the year, stronger recovery was noted on most dimensions. Expenditure by international business event attendees increased by 16%, which is slightly above the 2008 figure. Whilst spending by national business event attendees increased by 5%, the total expenditure figure was still 18% below the 2008 result.

As business events visitors have a much higher yield than the average visitor, there is considerable interest in the performance of the sector. TRA (2011) states that business event visitors spent on average $212 per night during 2010 compared to $136 per night for all visitors.

The number of international association meetings held in Australia increased sharply in 2010 reaching its highest level largely as a result of the improved performance of Sydney. As a consequence, Australia's international ranking more than recovered the loss it experienced in 2009, climbing to 11th place.

4.0 Key Performance Indicators

In order to assess and monitor over time the performance of Australia's business events sector, a range of Key Performance Indicators (KPIs) has been identified and listed in the table below. Where possible, values for 2009 have also been listed for comparison with the 2010 figures and it is likely that additional KPIs will be added in subsequent reports.

Table 5: Key Performance Indicators for 2009/2010

Key Performance Indicator (KPI)	2009	2010
Australia's international ranking in the ICCA Report for International Association Meetings	16	11
Australia's competitive ranking in the Asia Pacific in the ICCA Report for International Association Meetings	4	3
Australia's ranking in the UIA Report for International Association Meetings	15	12
Australia's annual growth in participant numbers in the ICCA Report	-3%	72%
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Australia's market share in the UIA Report for International Association Meetings (A + B Meetings).	2%	3.2%
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Total number of convention bureau bids won	486[1]	640[2]
Total estimated delegate expenditure from bids won	594M[1]	604M[2]
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Australia's rank in the list of Overall Country Brand	4	2
Australia's rank in the Ahnolt-GFK Nation Brand	9	9
Accredited meeting managers (MEA) – including in-house managers	50	62

Note 1: Refer to financial year 2008-09
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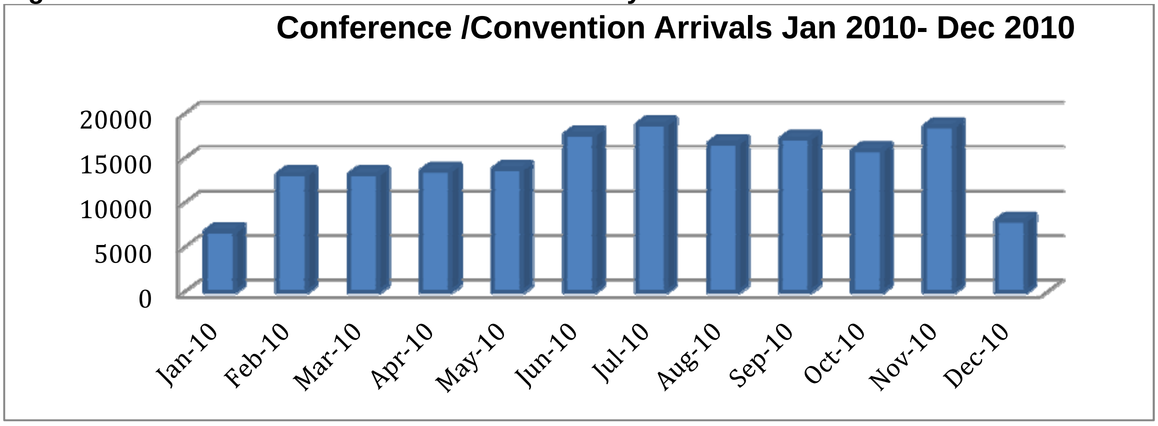
5.0 Sectoral Analysis

5.1 Conference/ Convention Arrivals

According to ABS data, arrivals to Australia for the purposes of attending conferences & conventions during 2010 totalled 173,500 which represented a 19% increase on the previous year. The fact that the total growth in arrivals to Australia during 2010 compared to the previous year was only 5% indicates that conference & convention visitation outperformed leisure tourism. The following figure presents the monthly arrivals pattern of conference and convention visitors indicating that the peak months during the year were July and November.

It is important to note that the purpose of visit in the ABS data is based on the categories that visitors mark on their arrival cards. It has been found in earlier studies that quite a number of visitors whose trip is prompted by a business event also have a holiday whilst in Australia and mark the 'holiday' category for purpose of visit or, indeed, mark the 'business' category. Whilst this results in a substantial under-estimation of the number of business event visitors, the figures are useful for inter-period comparisons.

Figure 3: Conference/Convention Arrivals January 2010-December 2010

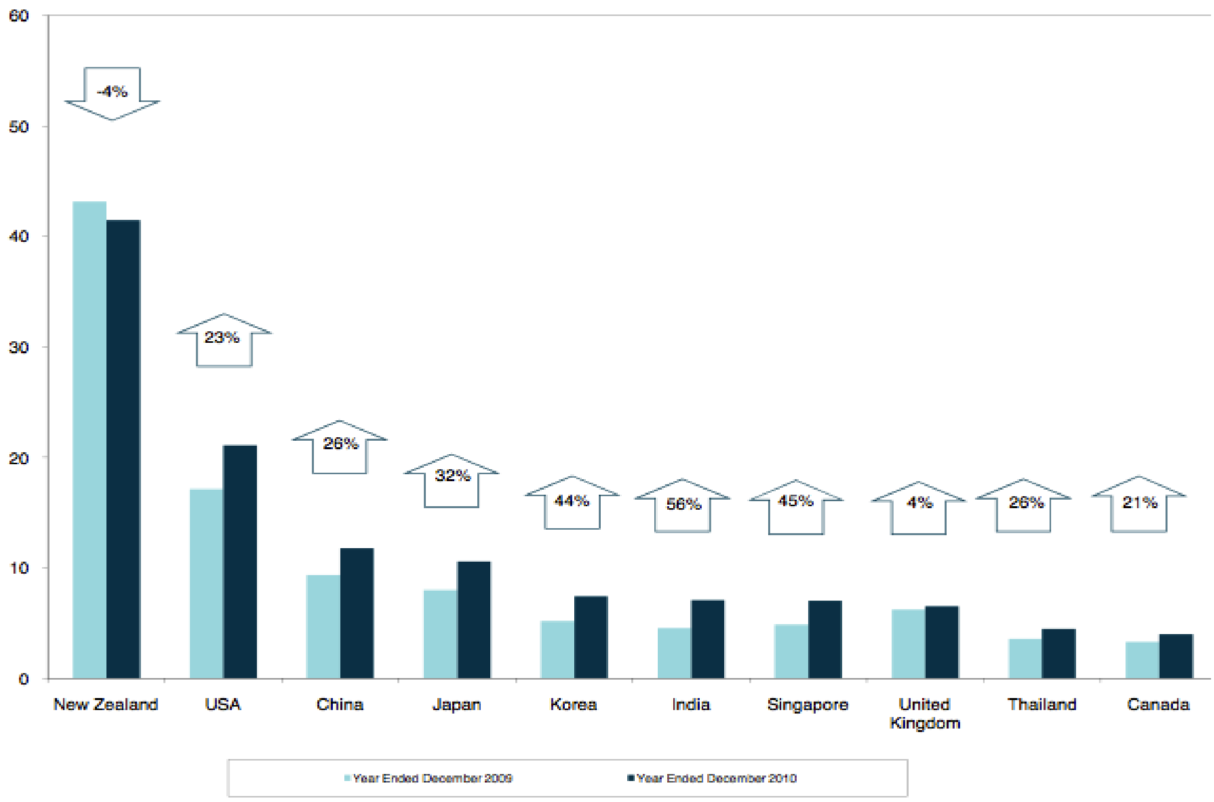


Source: ABS, May 2011

As can be seen in the following graph, New Zealand (NZ) remains Australia's major source market for conference visitors, providing approximately double the number of visitors that the next market (USA) provides. It is important to note, however, that there was a 4% reduction in the number of conference visitors from NZ in 2010 compared to 2009 whilst all of Australia's other key conference visitor source markets increased in visitation between 2009 and 2010.

Figure 4: Number of convention or conference visitors to Australia by country of residence. December 2009-December 2010

Australian Bureau of Statistics, Overseas Arrivals and Departures



Source: TRA 2010

The following table provides a summary of the performance of Australia's various visitor source markets by purpose of visit.

Table 6: Number of visitor arrivals to Australia by purpose of visit and country of residence.

Rank	Country of residence	Convention or conference arrivals: Year ended 30 April 11	% ch	3 mths ended April 11 % ch	Total business arrivals*: Year ended 30 April 11	% ch	3 mths ended April 11 % ch	Total arrivals: Year ended 30 April 11	% ch	3 mths ended April 11 % ch
1	New Zealand	43,248	↑ 1%	↑ 15%	206,444	↑ 8%	→ 0%	1,178,092	↑ 5%	↑ 5%
2	USA	20,333	↑ 9%	↓ -13%	114,196	↑ 12%	↑ 2%	471,224	↓ -3%	↑ 1%
3	China	12,443	↑ 33%	↑ 19%	64,897	↑ 30%	↑ 10%	490,205	↑ 30%	↑ 9%
4	Japan	10,734	↑ 27%	↑ 5%	36,428	↑ 10%	↓ -7%	375,150	↑ 5%	↓ -17%
5	Korea	7,816	↑ 41%	↑ 27%	15,626	↑ 23%	↑ 16%	207,947	↑ 9%	↓ -13%
6	Singapore	7,402	↑ 33%	↑ 19%	66,629	↑ 13%	↑ 10%	314,846	↑ 9%	↑ 6%
7	India	7,304	↑ 59%	↑ 17%	29,579	↑ 19%	↑ 6%	144,087	↑ 12%	↑ 12%
8	United Kingdom	6,846	↓ -1%	↑ 36%	53,923	↑ 13%	↑ 12%	637,349	↓ -3%	↓ -3%
9	Thailand	4,215	↑ 8%	↓ -12%	15,361	↑ 6%	↑ 1%	83,884	↓ -1%	↑ 4%
10	Indonesia	3,749	↑ 14%	↑ 12%	16,305	↑ 12%	↑ 17%	129,808	↑ 12%	↑ 21%
11	Malaysia	3,703	↑ 23%	↑ 55%	20,349	↑ 11%	↑ 1%	243,422	↑ 14%	↑ 7%
12	Canada	3,684	↑ 4%	↓ -35%	16,480	↑ 16%	↑ 6%	119,706	↓ -4%	↓ -2%
13	Germany	3,033	↑ 34%	↓ -12%	17,130	↑ 13%	↓ -7%	159,266	↓ -2%	↓ -3%
14	Philippines	2,997	↑ 6%	↓ -18%	9,136	↑ 12%	↑ 9%	52,667	↑ 8%	↑ 11%
15	Hong Kong	2,913	↓ -13%	↓ -51%	25,458	↑ 11%	↓ -2%	168,589	↑ 10%	↑ 4%
	Other	33,702	↑ 14%	↓ -17%	140,786	↑ 9%	→ 0%	1,136,099	↓ -1%	↓ -4%
	Total	174,122	↑ 13%	↑ 1%	848,725	↑ 12%	↑ 3%	5,912,341	↑ 5%	→ 0%

*A business visitor is defined in the above table as an international visitor who came to Australia for business including convention/conference as their main purpose of journey.

Source: Australian Bureau of Statistics (ABS), Overseas Arrivals and Departures, 3401.0. ABS data used with permission from the Australian Bureau of Statistics www.abs.gov.au

Table 1 reports on the three months to 30 April 2011 to reduce sample errors. The "%Change" calculations have been rounded to the nearest unit. The side arrow shows a 0% Variation when the absolute difference is < 0.5%.

This analysis was produced by Tourism Australia for Business Events Australia. For further information, including statistics on a financial or calendar year to date basis, please contact Leah Fletcher lfletcher@tourism.australia.com

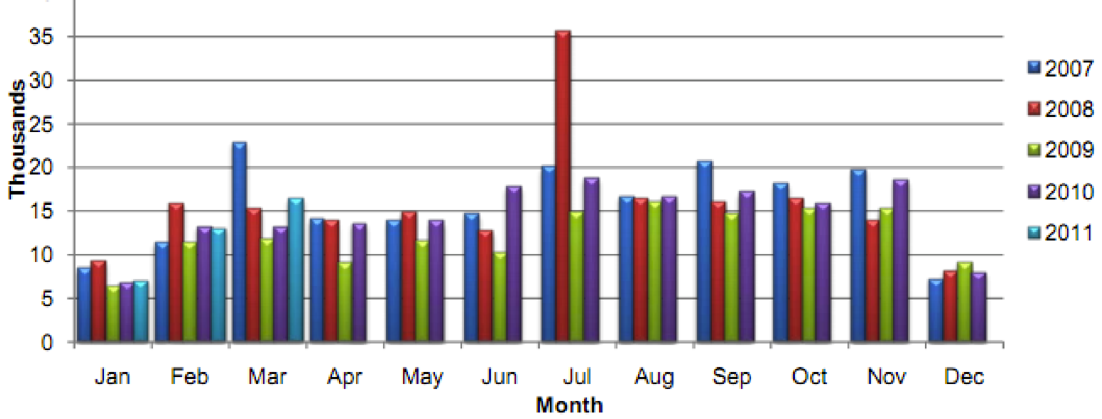
NB. Tourism Research Australia (TRA) also collects information on international arrivals to Australia on a quarterly basis through the International Visitor Survey (IVS). It is possible to analyse convention or conference arrivals in terms of expenditure, nights, states or territories visited, accommodation and transport used, country of residence, repeat visitation etc. However, data should only be used for indicative purposes only due to small sample sizes at this level of analysis. For general information on the IVS, visit http://tra.australia.com/ or for more tailored analysis contact research@tourism.australia.com.

Australian Government Tourism Australia

Source: TRA 2010

As can be seen in the following chart that compares the monthly convention/conference arrivals to Australia over the last four years, arrivals in each month except December were greater in 2010 than they were in 2009, but for most months the arrivals in 2010 did not reach the levels achieved in 2008.

Figure 5: Conference/Convention Arrivals to Australia Monthly Comparisons 2007-2011



Source: BECA, 2011 (compiled from ABS OAD figures)

It should be noted that the sharp spike in arrivals in July 2008 was due to World Youth Day.

5.1.1 Associations

Two high quality data sets are available to track the performance of countries and cities in relation to hosting international association meetings; one is produced by the International Convention and Congress Association (ICCA) and the other is produced by the Union of International Associations (UIA). Unfortunately, the definitions used by these two agencies to identify international association events differ so direct comparisons between the two data sets are not possible. The main definitional difference between the two data sets is that ICCA requires that a meeting must rotate between at least three countries whereas UIA includes meetings held in fixed locations.

The following table presents the top ten countries for hosting international association meetings during 2010 based on the ICCA and UIA reports. It can be seen that Australia is just outside the top ten for both data sets.

Table 7: Top International Meeting Countries in 2010

Ranking	ICCA - Country	UIA - Country
1	USA	USA
2	Germany	Japan
3	Spain	Singapore
4	UK	France
5	France	Belgium
6	Italy	Spain
7	Japan	Germany
8	China-PR	Korea
9	Brazil	UK
10	Switzerland	Austria
	Australia - 11	Australia - 12

Sources: ICCA Report 2010; UIA 2011

Extracted from these two data sets, the following table presents the top ten cities internationally for hosting international association events and also lists the positioning of various Australia cities that are outside the top ten. In the ICCA list, Sydney is ranked 10th, which is well above its 27th place in 2009.

Table 8: Top International Meeting Cities

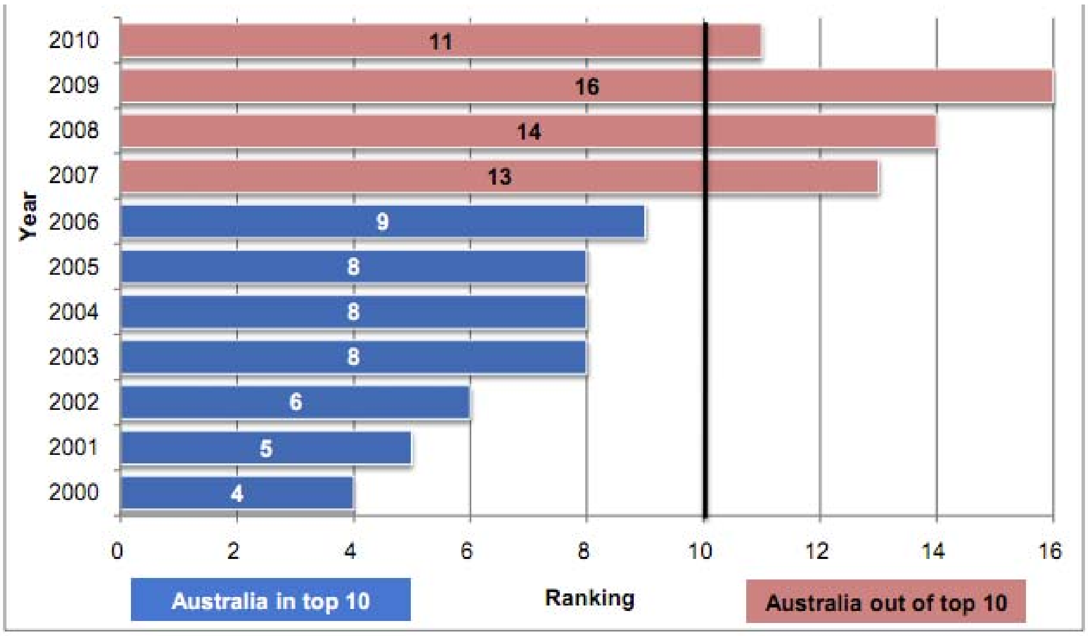
Ranking	ICCA - City	UIA - City
1	Vienna	Singapore
2	Barcelona	Brussels
3	Paris	Paris
4	Berlin	Vienna
5	Singapore	Seoul
6	Madrid	Barcelona
7	Istanbul	Tokyo
8	Lisbon	Geneva
9	Amsterdam	Madrid
10	Sydney	Berlin
	Melbourne - 40	Sydney - 14
	Brisbane - 74	Melbourne - 20
	Perth - 103	
	Cairns - 139	
	Adelaide - 215	
	Canberra - 284	

Sources: ICCA Report 2010; UIA 2011

Based on the UIA report, Melbourne had Australia's biggest increase in the number of international meetings in 2010 moving 21 places above its ranking in 2009. However, Sydney retained its position as the Australian city facilitating the most meetings moving up to 14th position (UIA, 2010). No other Australian cities featured in the top 40 city rankings in the UIA data.

As illustrated in the figure below, Australia showed a steady decline in its international ranking in the ICCA report between 2000 and 2009, dropping from 4th to 16th place. In 2010, however, Australia improved its position to 11th built largely on the improved performance of Sydney, which hosted 41 more international association meetings in 2010 than it did in 2009.

Figure 6: ICCA: Movements in Worldwide Rankings, Australia 2000-2010 (Based on the number of meetings



Source: BECA, 2011 (based on ICCA statistics)

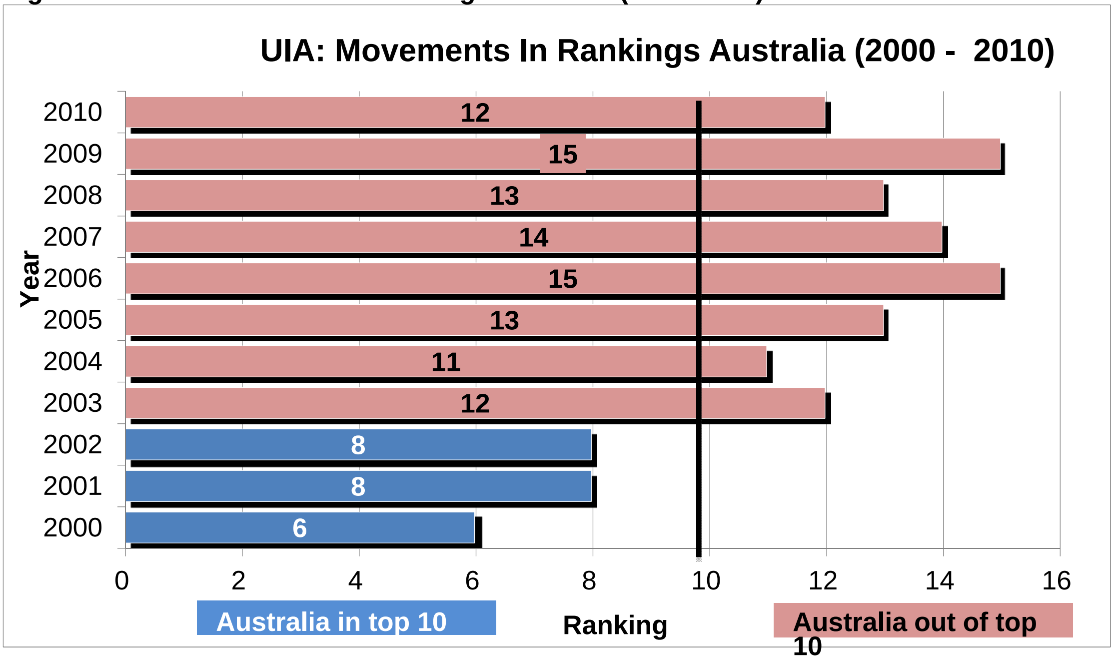
In the Asia Pacific region, ICCA data show that Australia fell from 1st place in 2006 to 4th place in 2009, rebounding to 3rd place in 2010.

Table 9: Australia Competitive ICCA Ranking in the Asia Pacific (Based on the number of meetings)

Ranking	2004	2005	2006	2007	2008	2009	2010
1	Australia	Australia	Australia	Japan	Japan	Japan	Japan
2	Japan	Japan	Japan	China PR	China PR	China PR	China PR
3	China PR	China PR	China PR	Australia	Australia	Korea	Australia
4	Singapore	Singapore	Singapore	Korea	Korea	Australia	Korea

The following figure and table provide comparison data taken from the latest UIA report (2010 figures released June 2011). The results are very similar to the ICCA reports with Australia having steadily dropped its international ranking since 2003 but showing a slight rebound in 2010.

Figure 7: UIA: Movements in Rankings Australia (2000-2010)



Source: BECA, 2011 (based on UIA statistics)

Table 10: UIA International Rankings Top Asia Pacific Cities

Ranking	2004	2005	2006	2007	2008	2009	2010
1	China, HK & Macau	China, HK & Macau	Singapore	Singapore	Singapore	Singapore	Japan
2	Australia	Australia =	China, HK & Macau	Japan	Japan	Japan	Singapore
3	Japan	Korea	Australia ↓1	Australia =	Korea	Korea	Korea
4	Korea	Singapore	Korea	Korea	Australia ↓1	Australia =	Australia =

BECA, 2011 (based on UIA statistics)

The following table, which is extracted from TRA (2011) provides details of conference activity in Australia with visitor numbers, trip nights and spend for the period 2008 to 2010. It can be seen that international and domestic overnight visitors for conferences & conventions increased during 2010 over 2009 in relation to numbers, visitor nights and expenditure in Australia but did not get back to the levels experienced in 2008. It is interesting to note that the expenditure from domestic day visitors to conferences and conventions fell by 27% on the expenditure in 2009.

Table 11: Conference/convention/seminar visitors, nights and spend.

Visitor type	2008	2009	2010	% Change
International				
Visitors ('000)	307	230	293	⇑27%
Trip Nights ('000)	4995	3645	4540	⇑24%
Spend in Australia ($ million)	732	537	694	⇑29%
Domestic overnight				
Visitors ('000)	2451	1987	2202	⇑11%
Trip Nights ('000)	7697	6429	6688	⇑4%
Spend in Australia ($ million)	2160	1466	1653	⇑13%
Domestic day				
Visitors ('000)	1956	1835	1817	⇒-1%
Spend in Australia ($ million)	189	199	145	⇓-27%
Total				
Visitors ('000)	4714	4052	4312	⇑6%
Trip Nights ('000)	12692	10083	11228	⇑11%
Spend in Australia ($ million)	3082	2202	2492	⇑13%

Source: TRA (2011), Business Events Visitors: 2010

5.2 Incentives

The incentives sector is often regarded as the highest yield component of business events and it is the sector for which information regarding performance has been most difficult to obtain. It is hoped that the formation of the Australian and New Zealand based Incentive Association in early 2011 may lead to improved data on this sector. As was indicated earlier in this report, travel is being included more frequently in incentive packages and there is a continuing trend to incorporate exclusive experiences into the incentive packages.

The following table, which is extracted from TRA (2011), highlights the dramatic fall in incentive visitation and expenditure that occurred during 2009. Whilst recovery occurred on most dimensions in 2010, incentive business did not get back to the 2008 levels.

One of the more concerning trends during 2010 was that the yield from incentive visitors fell well below the level achieved in 2009 with expenditure from both international and national incentive visitors being down. It can be seen in the following table that there were healthy increases in 2010 in the numbers of international incentive visitors and the number of nights they stayed but their total spend was the same as for the previous year. For domestic incentive visitors, the trend was much worse where incentive visitor spend was 29% lower in 2010 than in 2009 despite the fact that the number of domestic incentive visitors had increased by 3% over the previous year.

Table 12: Incentive visitors, nights and spend.

Visitor type	2008	2009	2010	% Change
International				
Visitors ('000)	49	34	39	⇑17%
Trip Nights ('000)	334	267	317	⇑19%
Spend in Australia ($ million)	57	55	55	⇒2%
Domestic overnight				
Visitors ('000)	191	170	175	⇑3%
Trip Nights ('000)	616	463	461	⇒0%
Spend in Australia ($ million)	131	120	85	⇓-29%
Total				
Visitors ('000)	240	204	214	⇑5%
Trip Nights ('000)	950	730	778	⇑7%
Spend in Australia ($ million)	188	174	140	⇓-19%

Source: TRA (2011), Business Events Visitors: 2010

Note: International incentive visitors are defined as those who visited as part of a job related reward or bonus provided by their employer for performance or sales and travelled with business associates and/or on a group (excluding sporting tours, guided holiday tours and school excursions).

5.3 Business Meetings

BECA defines a meeting as "being held in a commercial venue and involving more than 15 persons with a common purpose". The International Visitor Survey (IVS) and the National Visitor Survey (NVS) collect data on visitors for business meetings but it needs to be recognised that some of those who are identified in the IVS and NVS as attending business meetings would not meet BECA's criteria for attending a meeting. The main reason for this difference would be that the venue used to stage the meeting is not a commercial venue. That said, however, the data collected on business meetings via the IVS and NVS and presented in the following table, are considered to provide the best indication of trends in relation to meetings. It should also be remembered that IVS and NVS data do not capture those attendees who did not satisfy the criteria for being tourists or day trippers so locals who did not travel more than 50 kilometres and spend more than four hours would not be counted.

Consistent with the earlier discussion regarding incentives, 2010 saw the partial recovery of some of the ground lost in 2009 but the levels achieved in 2008 on most dimensions have not been reached. The one exception to this trend is the total spend in Australia of international visitors attending business meetings that was higher in 2010 than it was in 2008.

Table 13: Business Meetings visitors, nights and spend.

Visitor type	2008	2009	2010	% Change
International				
Visitors ('000)	548	525	532	⇑1%
Trip Nights ('000)	8322	8119	8150	⇒0%
Spend in Australia ($ million)	1314	1199	1382	⇑15%
Domestic overnight				
Visitors ('000)	6945	5899	5967	⇑1%
Trip Nights ('000)	18624	15274	16690	⇑9%
Spend in Australia ($ million)	5001	3953	4000	⇒1%
Domestic day				
Visitors ('000)	4775	4806	5460	⇑14%
Spend in Australia ($ million)	779	775	771	⇒-1%
Total				
Visitors	12268	11230	11959	⇑6%
Trip Nights	26946	23393	24840	⇑6%
Spend in Australia	6844	5626	5928	⇑5%

Source: TRA, Business Events Visitors: 2010

5.4 Exhibitions

Data from the IVS and NVS as presented in the following table indicates a mixed performance in 2010 compared to 2009 on the various dimensions relating to exhibitions. Whilst the total number of international exhibition visitors increased in 2010 over the previous year, the number of nights stayed and total spend in Australia both fell. Domestic overnight exhibition visitors in 2010 were greater in number, stayed more nights and spent more than the same category of visitor in 2009, indeed, all of these dimensions exceeded performance in 2008. In relation to domestic day visitors to exhibitions in 2010, numbers were up on 2009 but total spend was lower.

Table 14: Exhibitions visitors, nights and spend.

Visitor type	2008	2009	2010	% Change
International				
Visitors ('000)	59	38	45	⇑17%
Trip Nights ('000)	1627	1381	1369	⇒-1%
Spend in Australia ($ million)	244	199	171	⇓-14%
Domestic overnight				
Visitors ('000)	473	399	475	⇑19%
Trip Nights ('000)	1748	1337	1856	⇑39%
Spend in Australia ($ million)	434	362	454	⇑25%
Domestic day				
Visitors ('000)	908	1018	1062	⇑4%
Spend in Australia ($ million)	103	119	105	⇓-12%
Total				
Visitors ('000)	1440	1456	1582	⇑9%
Trip Nights ('000)	3375	2718	3225	⇑19%
Spend in Australia ($ million)	782	680	730	⇑7%

Source: TRA, Business Events Visitors: 2010

Research released by UFI (2010 Global Exhibition Barometer) indicates that the exhibition business in the Asia-Pacific region has largely recovered from the global financial crisis with 65% of those surveyed saying they have now put the crisis behind them. The annual operating profit for the years 2009 and 2010 show an increase in profits in 2010 over 2009. In UFI's global survey of its members, no respondents stated that they had made losses in 2010 compared to 2009; 45% stated their operating profit was stable and 52% stated they had increases of 10% in 2010 over the 2009 period.

Table 15: Asia and Pacific Group: Annual Operating Profit for Exhibitions in 2009 and 2010

% change 2009-2010	Type of Change
0%	Loss
0%	Reduced by more than 50%
2%	Reduced by 10-50%
45%	Stable (between -10% and +10%)
52%	Increased by more than 10%

Source: UFI 2010 Global Exhibition Barometer

6.0 Other Factors

6.1 Infrastructure

A recent report on tourism investment in Australia (TRA, 2011: 17) states that:

> Total real investment in tourism related industries increased, while the share of tourism industry investment to total investment declined, indicating that tourism investment grew at a slower rate than that in the total economy.

Investment in infrastructure for business events focuses mainly around conference and exhibition venues and accommodation. Investment in accommodation since 1997 has decreased and this trend continued in the 2009-2010 period.

Table 16: Industry share in the total tourism industry investment (%) in volume terms

Tourism industries	1997-98	2003-04	2009-10
Retail trade	5.7	5.9	4.9
Accommodation and food services	24.5	17.1	12.4
Transport, postal and warehousing services	30.8	2	37.3
Rental, hiring and real estate services	4.7	3.9	4.5
Administrative and support services	4.2	1.3	1.3
Education and training	2.2	4.3	12.9
Arts and recreation services	7.6	4.2	4.8

Tourism industries	1997-98	2003-04	2009-10
Ownership of dwellings	14.6	21.6	19.2
All other industries	5.7	3.5	2.7
Total 100		100	100

Source: TRA, June 2011

In Australia, major expansions in business events venues have either recently been completed or are underway. The Brisbane Convention Exhibition Centre (an AUD$40 million expansion) will provide 19 new meeting rooms and two additional speaker preparation centres, two dedicated conference floors, a 400 seat tiered theatre auditorium and a 600 seat tiered theatre auditorium. The Gold Coast Convention and Exhibition Centre was expanded and re-opened in 2009, while the Adelaide Convention Centre is undertaking an AUD$350 million expansion project. The Melbourne Convention and Exhibition Centre opened in 2009 offering significantly larger, new spaces for conventions. In Sydney, more than AUD$7 billion has been proposed for the industry including an expansion of the Sydney Convention and Exhibition Centre, a major upgrade of Star City Casino and a new harbour side development called Barangaroo. A completely new convention centre is planned for Canberra.

Table 17: Australian's Venue Capacity

Location	Facility Type		
	Theatre Style	Banquet Style	Classroom Style
Adelaide	7155	4500	2910
Alice Springs	1200	800	720
Brisbane	4000	2740	1209
Cairns	5000	1300	730
Canberra	3200	1800	1700
Darwin	1000	400	300
Gold Coast	6021	2240	2106
Melbourne	5000	5000	5000
Perth	5200	3630	3545
Sunshine Coast	1280	800	650
Sydney	3500	3500	800
Tasmania	1600	1000	750
Townsville	5200	1000	980

Whitsundays	1000	800	650

Source: Grassroots 2011 (using Business Events Australia data)

In addition to the convention and exhibition centre expansion and refurbishment being undertaken in Australia, is the investment in other venues such as hotels. During 2010, Melbourne saw the development of the 5-star boutique Blackman Hotel and Cullen Hotel, while in Sydney the 4-5 star Mercure Sydney Hotel was developed. Each of these developments offers conference facilities (Grassroots, 2011)

6.2 Accommodation

The following table provides an overview of the state of play in relation to accommodation in each of Australia's capital cities. The range and availability of accommodation in the host cities being used for business events play important roles in underpinning the sector and this table provides a profile of accommodation supply in relation to category of accommodation.

Table 18: Australian Accommodation by Type and City.

City	Accommodation Type							
	Hotels and Resorts		Motels, Private Hotels and Guest Houses		Serviced Apartments		Hotels, Motels and Serviced Apartments	
	No. of Est.*	No. of Rooms	No. of Est.	No. of Rooms	No. of Est.	No. of Rooms	No. of Est.	No. of Rooms
Adelaide	31	3698	49	2063	21	1,270	101	7031
Brisbane	32	4261	92	3994	70	4817	194	13072
Canberra	16	2272	20	1399	17	1228	53	4899
Darwin	15	1768	14	668	14	1290	43	3726
Hobart	17	1301	21	732	10	579	48	2612
Perth	46	6433	37	1949	41	2490	124	10872
Melbourne	82	13186	106	5207	105	7068	293	25461
Sydney	107	19657	112	7228	73	5979	292	32864

*Number of Establishments

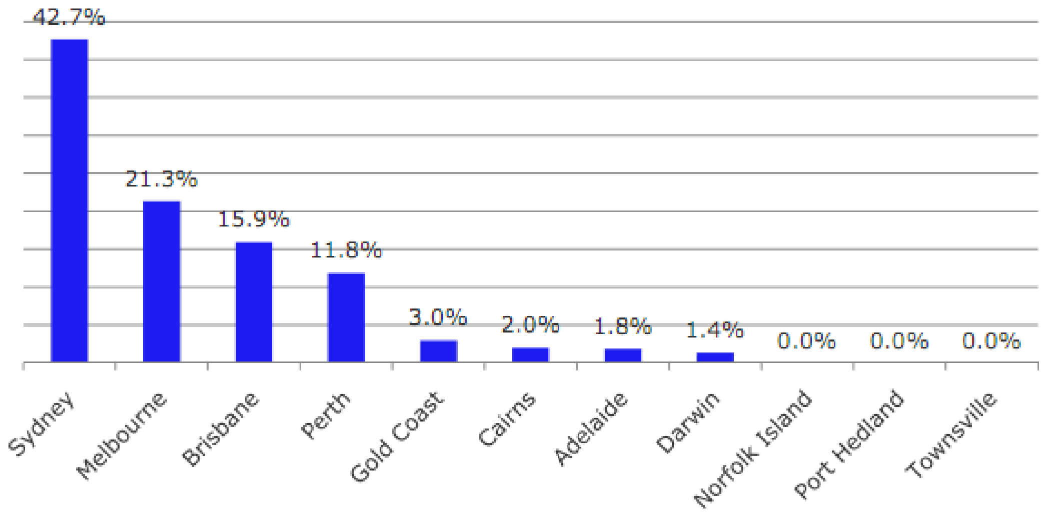
Source: ABS Small Area Data, December Quarter, 2010

6.3 Aviation

Fifty-four international scheduled airlines operated services to/from Australia during 2010 (including 5 dedicated freight airlines but excluding airlines operating only via code share arrangements). Seats made available on international scheduled operations in 2010 totaled 35.602 million – an increase of 7.5% compared to 2009 and an increase of 12.9% compared to 2008. The overall seat utilisation percentage decreased from 75.6 % in 2008 to 74.8 % in 2009, but has risen to 76.2% in 2010. (BITRE, 2010).

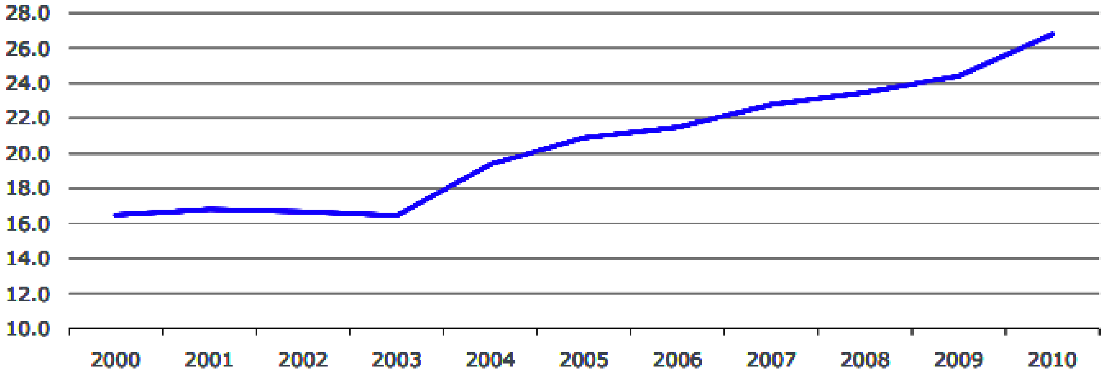
Seat utilisation at all the capital city airports increased in 2010 compared to 2009. Adelaide recorded the highest rate at 82.2% while of the major airports, Cairns had the lowest rate at 67.3%. Of the 35.602 million seats operated to/from Australia in 2010, Sydney accounted for 42.7 % followed by Melbourne with 21.3 %. The following chart presents these data.

Figure 8: Share of Total Inbound and Outbound Airline Seat Capacity in 2010



International scheduled passenger traffic in 2010 was 26.792 million compared to 24.407 million in 2009 – an increase of 9.8 per cent. The following charts illustrate the increase in flights over previous years and the monthly activity in 2010.

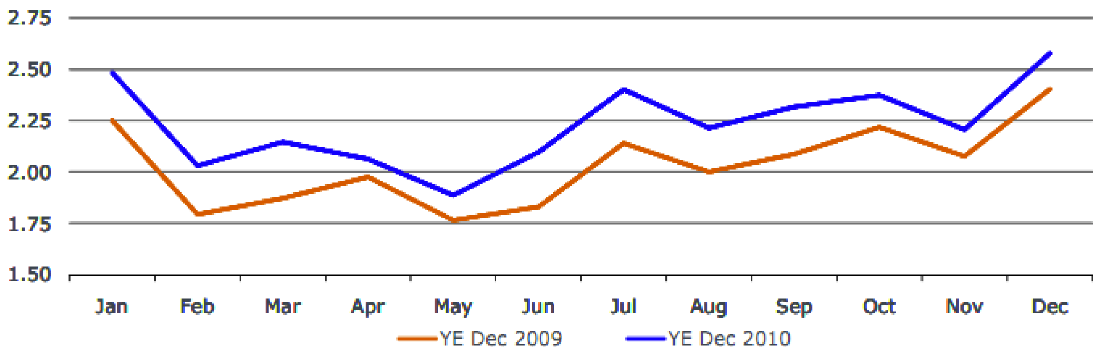
Figure 9: Total International Passengers Carried (millions) - Years ended December



Source: BITRE, 2011

Although the Global Financial Crisis, which started in late 2008, affected aviation activity, month on month growth rates of more than 9% were recorded between September 2009 and March 2010 and again between June 2010 and September 2010.

Figure 10: Total International Passengers Carried (millions) - By Month



Source: BITRE, 2011

6.4 Technology

The use of technology in Business Events is increasing in variety and magnitude and quite a large component of this development relates to communications technology. The Grassroots Report (2011) found that 70% of large companies run virtual conferences, with 83% participating in webinars during 2010. However, a range of studies have been undertaken that demonstrate the importance of face-to-face communication. In an ITM/Amex report, 48% of travellers stated that the ROI from face-to-face interaction was significantly higher than that offered by alternative methods. Meeting professionals now use a range of social networking tools such as Linkedin (64%), Facebook (60%), Twitter (27%) and YouTube (23%) (IMEX, 2010).

As indicated earlier in this report, there does appear to be a trend to use advanced communication technology to replace some of the smaller corporate meetings. However, due to the widely accepted benefits of face-to-face meetings, communication technology tends to be used to enhance the meeting experience rather than replace it as well as to provide access to the meetings by audiences that would otherwise be unable to attend. Clearly, this is an area that will need to be monitored closely as further improvements in communications technology coupled with increased concerns regarding the cost and carbon footprint of business travel pose serious threats to the staging of business events.

6.5 Sustainability/CSR

The area of corporate social responsibility (CSR) has been a focus for the Australian Business Events industry for some time now and with the introduction of the new Events Standards ISO 20121 *Sustainability in Event Management*, the industry is well placed for the requirements of this process. Although the standard will not be introduced until the London Olympic Games in 2012, there was substantial work undertaken during 2010.

Business Events Australia’s first audit of CSR within business events in 2009 examined the industry with regard to green accreditation, CSR management and green products and initiatives. The 2010 report, *Destination CSR: How Australia is travelling in 2010* shows a significant increase in the CSR accreditation over the 2009 results (based on 2008 data). Of the 347 respondents, 36% held at least one accreditation for environmental or social responsibility, up from 31% in the 2008 data. According to the latest report, 75% of convention and exhibition centres are now accredited. The Convention 2020 survey also revealed that 70% of respondents stated that ethical and environmental issues would be important in the decision making related to event attendance. The most common initiatives were to reduce energy and water use, increase the eco efficiency of materials used and to enhance the wellbeing of local communities. Many did this through purchasing local products and hiring local staff.

Despite the increased interest in sustainability, ‘cost’ takes precedent over ‘green’ if a forced choice is required (Benchmark Hospitality International’s Top Meeting Trends for 2010). It appears that sustainability is becoming seen as a hygiene factor; it is expected to be part of the package but clients don’t expect to pay for it.

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