

BUSINESS EVENTS MARKET PROFILE

NORTH AMERICA

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 trade 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, trade engagement and events that allow the Australian business events industry to meet with qualified buyers to grow their business.

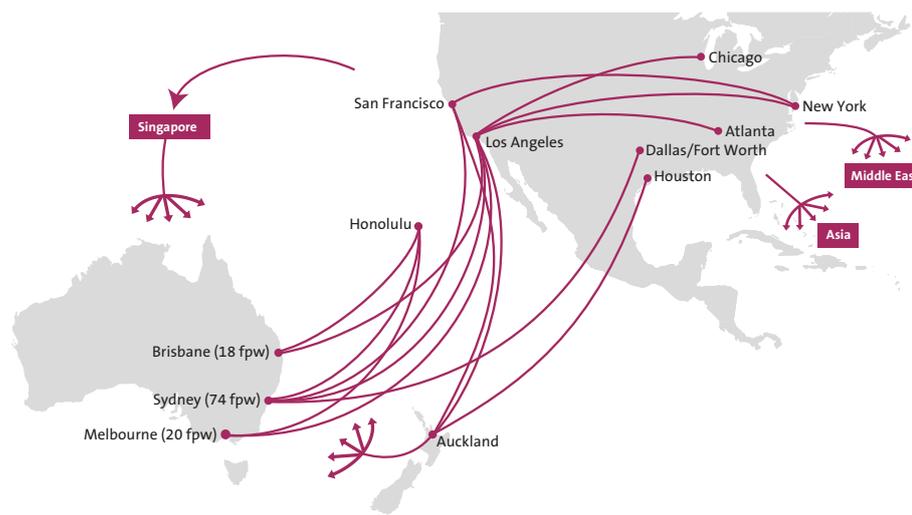
Tourism Australia also supports the work undertaken by Australian industry in bidding for association events and in securing international delegates for these events.

In the year ending June 2017, 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 AUD693m from 110,000 USA business events arrivals.

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

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

AVIATION ROUTES FROM NORTH AMERICA TO AUSTRALIA¹



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/business-events.aspx

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

Airline	2016
Qantas Airways	24%
United Airlines	14%
Air New Zealand	9%
Virgin Australia	8%
Delta Air Lines	6%
American Airlines	5%
Jetstar	4%
Emirates	3%
Others	27%

BUSINESS EVENT INSIGHTS AND TRENDS – ASSOCIATION

- » Whilst decisions on where to host events are led by USA-based associations, the majority of these require bids for events 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 nominates Australia to host.
- » 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.
- » Working with international associations to secure events is a complex undertaking, and requires a thorough understanding of the goals and structure of not just the association, but the bidding process for the particular event. This work can take years to develop and involve multiple partners and activities. Establishing strong relationships with associations, with key advocates for a destination and with suppliers is crucial to securing events.
- » 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.
- » Providing associations with an understanding of competitive pricing on hosting an event in Australia, for example that taxes are included in all prices or gratuities are not required, can explain the cost/benefit of choosing Australia.
- » Associations are looking to expand their global membership with new members, sponsors and exhibitors. It's therefore important to provide them with 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 the close proximity of Australia to Asia, as associations are looking to increase membership and sponsors from this region.
- » Traditionally the majority of associations based in North America operate on a 10 year geographic rotation, taking events internationally in a set pattern, ie; northern hemisphere then southern. However associations are moving away from this model to one where selection of a destination is based on a variety of criteria, including economic conditions both at the destination and within their home country.

- » An emerging 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.
- » Washington DC and Chicago continue to be 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.

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 bureau services and see them as a reliable and unbiased resource when planning incentive itineraries. They will then engage a 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.
- » Key source industries for North American incentive groups are insurance, financial, technology and automotive.
- » The east coast of Australia is still a focus for the North America market, with Cairns and Port Douglas gaining interest amongst incentive planners.
- » Incentive and corporate business lead time is becoming shorter. Timelines of less than a week from inquiry to decision are now common.
- » Growth in direct aviation capacity between North America and Australia is aiding the business events opportunity. Additional capacity and services, now up to 124 flights per week, is encouraging competitive pricing on the route.
- » Canada is providing renewed opportunity for Australia, with planners and corporate end users showing increased interest in Australia. The launch of Air Canada's new service to Australia (Vancouver to Brisbane and Vancouver to Melbourne), has also assisted this development, providing the Canadian incentive market with a new non-stop direct service option for travel to Australia.

NORTH AMERICA BUSINESS EVENTS DISTRIBUTION SYSTEM

In the North America incentive market, business event planners are known as Conference and Incentive Agencies, or Incentive Houses. The majority of planners and corporate end users will engage a Destination Management Company (DMC) to deliver the program in Australia.

DMCs are still widely used in order to manage arrangements and for clients wanting bespoke incentive experiences.

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.

Professional Conference Organiser (PCO), Association Management Company (AMC)

Key PCOs and AMCs in North America include:

- » Conference Direct
- » JPDL (based in Montreal)
- » Kenes
- » MCI
- » Smith Buckland/Courtesy & Associates
- » Talley Management
- » Venue West (based in Vancouver)

Conference & Incentive Agencies (includes Incentive Houses and third party agencies)

Key agencies in North America include:

- » BI Worldwide
- » Carlson Wagonlit Travel (CWT)
- » Maritz
- » Mercian
- » Wynford (based in Toronto)

Destination Management Company (DMC)

Key DMCs active in North America include:

- » AOT
- » Arinex
- » 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 representative 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 calling is strongly discouraged in this highly 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, 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 for agents than general drinks receptions or workshops.
- » Tourism Australia suggests Australian industry tailor their product information to the North American market, taking into account their general knowledge about Australia. Educating buyers on their destination, product offering, logistics and suggested itineraries is highly recommended.

KEY BUSINESS EVENTS TRADE ACTIVITY

Event	Location	Date
IMEX America	Las Vegas, NV	16 - 18 Oct 2018

IMEX America is a key business events trade show, which attracts both association conference 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 engagement activity that demonstrates why there is nothing like Australia for business events. This includes sales calls, training events, and attendance at accredited events such as the Association Forum, SITE and MPI.

As part of its trade 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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