

Supporting the jobs of today, generating and securing the jobs of the future

**BUSINESS EVENTS SECTOR:
NEW POLICY FRAMEWORK
DECEMBER 2017**



PRESENTED BY:



REPORT PREPARED BY:



About BECA

The Business Events Council of Australia (BECA) was formed in 1994 as a peak industry body for the business events sector to liaise with the federal government and relevant agencies on matters common to all segments of the business events sector.



Association
of Australian
Convention
Bureaux



ICCA
Asia Pacific
Chapter

Australian Convention
Centres Group



EXHIBITION & EVENT
ASSOCIATION OF AUSTRALASIA



KEEPING
AUSTRALIA
MEETING

The Council provides a formalised umbrella structure for the key industry associations operating in the Australian business events sector. BECA's members are:

- Association of Australian Convention Bureaux (AACB)
- Australian Convention Centres Group (ACCG)
- Exhibition and Event Association of Australasia (EEAA)
- International Convention and Congress Association (ICCA) - Australian Chapter
- Meetings and Events Australia (MEA)
- Professional Conference Organisers Association Inc (PCOA)

It is BECA's role to develop business events sector positions on issues of common interest, and communicate those views to government and relevant agencies. BECA also provides a forum for the industry associations to exchange information and cooperate on appropriate matters, with a view to strengthening and growing the business events sector in Australia.

Business Events Council of Australia (BECA)

GPO Box 777
Melbourne, VIC 3001
www.busesseventscouncil.org

Executive Summary

With an overarching theme of Supporting the jobs of today, generating and securing the jobs of the future, this policy framework establishes a new rationale and fresh initiatives for Australia's business events sector.

The business events sector is much more than a contributor to Australia's visitor economy, but its potential is too often not acknowledged and is not being actively supported and developed. The incredible value proposition of the business events sector vis-a-vis other industries is that it is both a large and growing industry in its own right but also a powerful enabler of others. Across many disciplines and sectors, business events can be a knowledge translation tool, a bridge between research and ideas on one hand and real-world practice or business on the other.

This framework looks beyond the impacts on the visitor economy, defining

five policy pillars that will establish business events as a platform for supporting and developing new jobs and industries in Australia.

Governments around the world are choosing to prioritise investment in the business events sector because of high yield returns and the long-term benefits from growth in the visitor and knowledge-based economies. While technology has disrupted many industries, the premium on face-to-face contact for business has never been higher. There is a reported wall of money lined up to invest in the business events sector. At present, there is more money available in some of the world's biggest private equity funds than

the investment opportunities that have been identified in the sector.

Notwithstanding some strengths, Australia's competitive position in a globally growing business events sector is eroding. The global business events sector is developing at an unprecedented rate, but Australia is not benefiting to the level it should. In this context and to realise the potential from ongoing diversification of the economy, the framework presents the case for government investing in a Growth Facility to support business events in a more targeted, coordinated and effective way and enhancing the Growth Centres industry development model.

Amongst other measures, a new business diplomacy initiative is proposed to align with and support the government's international diplomatic efforts to more closely engage with the private sector, the business community, and non-government organisations. Importantly, this new policy framework highlights the commitment by the business events sector to step up with a stronger more aligned leadership and an ongoing long-term strategy. The business events sector is poised to deliver great prosperity to the nation and because Australia's key growth industries are regionally based, leverage the strengths of the regions.

Business events are increasingly being used by many countries as strategic tools for attracting trade, investment and global talent to help grow key pillars of their economies.

Introduction

Business events (BE) make a significant contribution to the Australian economy, our cities and regions – and the indicators are such that the potential is much greater again.

Business events support hundreds of thousands of jobs today across the service sector and beyond and they hold a key to generating and securing many more jobs of the future. They create marketplaces for business, for ideas, for knowledge and for people to develop and pursue special interests.¹

In 2015-16, over 38 million people attended more than 429 500 business events across Australia.² These business events directly generated \$30.2 billion in expenditure, \$13.9 billion in direct value added and supported 193 203 jobs. Business events stimulate the Australian economy, generating trade, investment and employment. They are also a major driver of the visitor economy in Australia's major cities and regions.

With potential yet to be realised, the BE sector augments significant economic activity well beyond anything currently measured and is crucial in building and maintaining the country's soft infrastructure: knowledge creation and exchange, networks and partnerships, innovation and commercialisation.

The most recent forecasts for the BE sector show strong growth into the future, with the Asia Pacific region being the key driver of activity.³ Globally, the business events sector is forecast to grow at a 4% compound annual rate and for years has outstripped GDP growth. This provides huge opportunity for the business events sector and for Australia, but it also means greater competition

in a field in which Australia is falling behind. **For example, in the international association meetings market, Australia's share has declined to 2%, ranked behind 15 other countries⁴** and we do not appear in any market analysts reports as a country which investors should consider. This means a change is needed in our industry and in our partnerships – it can't be business events as usual if we are to realise the benefits of the sector into the future.

The BE sector is increasingly seen as an incubator and catalyst for the diversification of whole economies. **Around the world, business events are being used as strategic tools for attracting trade, investment and global talent.** Governments are choosing to prioritise investment in the business events sector because of the high yield returns and the long-term benefits accruing from growth in the visitor and knowledge-based economies as well as from the marketplaces it creates for buyers and sellers to meet.

Across many disciplines and sectors, business events can be a knowledge translation tool, a bridge between research and ideas on one hand and real-world practice or business on the other. In other words, business events can help bridge the gap between what we know and what we do. Improving this knowledge translation is a priority for governments across the world, particularly in Australia.

The opportunity in the international business events market is significant and one that Australia can capitalise on given our world class convention and exhibition centres, attractive tourism appeal, and proximity to some of the most rapidly growing countries in the world. They provide valuable opportunities to promote the strengths of our industries, regions and talents to the world.

¹ BECA defines a business event (BE) as any public or private activity consisting of a minimum of 15 persons with a common interest or vocation, held in a specific venue or venues, and hosted by an organisation (or organisations). This may include (but not limited to): conferences, conventions, symposia, congresses, incentive group events, marketing events, special celebrations, seminar, courses, public or trade shows, product launches, exhibitions, company general meetings, corporate retreats, study tours or training programs.

² Ernst and Young 2017 report for the Business Events Council of Australia

³ UFI Global Exhibition Barometer, 19th Edition, 2017

⁴ Australian Association of Convention Bureaux and International Convention and Congress Association (ICCA) - Australian Chapter data

The Value of Business Events in Australia

An Ernst & Young 2017 report for the
Business Events Council of Australia (BECA) found that:

*Over 38 million people attended more than 429,500
business events across Australia in 2015-16*

These business events directly generated



\$30.2 billion
in direct
expenditure



\$13.9 billion
in direct value
added



193,203
direct
jobs



\$24.9 billion in
total economic
contribution (GDP)

In Australia and elsewhere, businesses and organisations are increasingly looking for a quick, easy way to enable their marketing strategy to reach out to customers in a way that engages them, builds a relationship, stimulates word-of-mouth, and increases brand loyalty. Going online and utilising digital channels is critical to this. Building online connections with customers and potential prospects has become a fundamental part of marketing. Yet, in the midst of all online interactions, face to face interactions are still a powerful and valuable way to forge important relationships.

Customers in the twenty first century increasingly feel a loyal connection with brands. Events can show a brand's

unique personality and give customers and partners the opportunity to connect and associate. In other words, events help generate greater brand recognition, enhance the accessibility of a brand to target audiences, and most importantly, authenticate and validate the brand. This can hold true across a whole range of sectors and disciplines: from scientific and medical research, to consumer goods or engineering services. Life experiences are more engaging and cognitively shape memories much more profoundly than anything else. In short, business events help cut through the competitive clutter of a modern marketplace – by facilitating face-to-face discussion with customers, partners and allies, it consolidates a more personal and intimate relationship with the brand.

Business events also help generate valuable feedback in real time about products, services or ideas, thereby spurring innovation.

This document provides the basis for a strengthened commitment and greater sector leadership to realise the full potential of the BE sector. It presents a refreshed and stronger policy framework, identifying where partnerships between the BE sector and government will deliver benefits across the economy. It is based on better coordination, capacity building and profile transformation. It aims to sustain and enhance the business events sector's contribution to the nation amidst increased competition.

Approach and Structure of Policy Framework

Beyond the direct impact in the visitor economy, business events have been and can be incubators and catalysts for new jobs and industries in Australia. The overarching theme of **Supporting the jobs of today, generating and securing the jobs of the future** establishes an enduring and coherent policy headline for the development and management of the sector, that aligns with a **key need for our nation – ongoing diversification of our economy in areas of competitive advantage.**

While technology has disrupted business, the premium on face-to-face contact for business has never been higher. The convergence between the offline and online world is enabled through people coming together for business events. The digitisation of business practices has not replaced people meeting face-to-face, indeed it has made business events more effective as event technology enables engagement to be developed before, during and after the event and on a large scale, with global collaboration and best practice sharing. In turn, there are opportunities for business events to spur further innovation.⁵

Business events have an engagement footprint that goes way beyond the trade show, meeting or incentive event. Australia already has areas of competitive strength, such as energy resources, agriculture, advanced manufacturing, medical science and mining related technologies. We have significant opportunities in emerging industry sectors like fintech and precision, real-time data agriculture. If we move quickly to get in front of our competitors, build on these strengths and become a world leader in digital innovation, McKinsey has predicted we could boost the Australian economy by \$140 billion to \$250 billion over the next eight years.⁶ Adding the strength of being a premium location for conferences, meetings and business events can facilitate and amplify that projected gain.

This ambition will not be realised if it is business events as usual – a new policy framework is required, supporting a new level of commitment, including to regional Australia. To be successful, this policy framework will need coordinated, ongoing support and investment and the sector and Australian governments working in a new style of partnership.

The new policy framework has been developed through research and review of business events sector reports and documents, key case studies and stakeholder contact and consultation, including with:

- Chair and board members of Business Events Council of Australia (BECA)
- CEO, President and members of Exhibition & Events Association of Australasia
- CEO of the Association of Australian Convention Bureaux
- Speakers and attendees at the Exhibition and Events Association of Australasia 2017 Conference
- Austrade
- Tourism Australia
- Department of Foreign Affairs and Trade
- Department of Industry, Innovation and Science
- CEO of Business Events Sydney
- Business events sector researchers at University of Technology Sydney and University of NSW

The process has identified five key pillars that form the policy framework (see diagram below). Under each pillar sits the strategic intent and the initiatives that will deliver the first wave of development for a reinvigorated business events sector and support improving prosperity, most importantly across regional Australia.

⁵ The Global Association for the Exhibition Industry (UFI) reported on the digitisation of the sector and found that there was a massive upsurge in activity to accelerate digitisation in the exhibition industry. The U.K., Germany, China, and the U.S. were identified as the most active exhibition markets in the digital transformation process; Australia was below these.

⁶ McKinsey Quarterly, 2017

DIAGRAM 1:

Business events sector key policy pillars



With finite resources, it is critical that efforts are concentrated on those areas that are expected to bring the largest benefits. Many policy areas and initiatives do not simply fit within one of the five key pillars. Instead, there are many links and interdependencies

across what is a large and complex system. The main implication is that no single activity area works in isolation and achieving a breakthrough will require a deliberate, sustained emphasis on performance and results for each initiative.

PILLAR 1:

Sector Leadership and Research

A unified sector

Australia's business events sector has the potential to ignite the economy with a more coordinated policy focus and effort. With the broader visitor economy being fragmented in its representation, the business events sector (as a sub-set of this community) has found it difficult to achieve meaningful cut through. Many within the sector and those in government who work with the sector observe that a more coordinated and longer-term growth strategy would assist in addressing the significant challenges and realise more opportunities.

There are demonstrable pockets of excellence within the sector and individuals with the skills and commitment to lead the sector, but to date efforts to fully realise the business events offering have been to no avail. At the heart of this issue is the fact that the sector has been developed and managed through a visitor economy lens only, across various

levels of government. In addition, strong competition exists between sector participants for the limited policy and funding support for major business events.

There are major mutual benefits to be gained if stakeholders can be unified and collaborate on a consolidated policy framework. BECA is positioned to deliver this.

The business events sector recognises that for others, including Australian

taxpayers, to invest in the sector, it needs to be structured, coordinated and continually reinvesting in itself in a way that ensures the nation realises value. For private investment, the same is true – value must be able to be realised. This new policy framework, provides the basis for BECA, the business events peak body, to clarify and further unify its members and enhance the effectiveness of its engagement with government. A strong united sector sharing headline goals and ambitions will unlock greater potential for the nation.

Initiative 1.1 - The sector commits to identify business events leaders who will have the primary responsibility to design, implement and manage a strategy to deliver a unified sector approach, supported by this policy framework by the beginning of 2019.

A coordinated sector approach to data collection, evaluation and research

Data drives industry, business and government decision making. If the benefits, strengths and weaknesses of the business events sector aren't measured they cannot be managed. The business events sector must take responsibility for collating, analysing and presenting its data, in cooperation with Austrade's Tourism Research Australia, Tourism Australia and others.

The business events sector, working with government, commits to develop a mechanism to produce a yearly report including economic and social impacts, market share tracking, and business events case studies. Capturing the insights from big data, including through social media in this sector, will be increasingly important in the digital

economy. The capture of data for large scale national events and international events, in line with the whole-of-sector approach, with the ability to segregate between the two as required will be valuable. A rigorous and consistent data driven strategy will be a great asset to the sector and allow for greater, targeted regional participation.

Initiative 1.2 – The business events sector commits to develop a mechanism that optimally aligns state-based data and create a whole-of-sector database which can be used for yearly reporting on economic and social benefits of business events, including to regional Australia.

Drive quality assurance through integrated integrity, security and visa measures

Business events must adjust and respond to the heightened global security risks. Participant and public safety is the sector's primary concern. As such, the sector – in partnership with government – commits to continuous improvement of business event security and integrity systems in response to changing security environment and heightened requirements.

Business visitors are amongst the highest yielding, lowest risk visitors to Australia. Yet, recent years have seen changes to visa entry to Australia that result in more – rather than less – barriers to business

visitor entry (e.g. closure of bulk visa application discount arrangements and significant price increases for visas, far in excess of CPI).⁷

This is in direct contrast to our competitor countries, notably in Asia, who have actively removed restriction for business travel. Singapore, South Korea and Hong Kong, for example, all have visa-free requirements for almost all countries for business travel. Security interests are critical but some careful risk assessment regarding this class of travel and its

economic potential urgently needs to be undertaken.

Short-term, risk-averse thinking can have dire opportunity costs. For example, Australia's bid for a major event with 8,000 influential business leaders from China faltered due to the visa processing charge of \$1.3 million for the group. As a result, the event was won by New Zealand which waived visa charges. The event injected over \$60 million to New Zealand economy.

Initiative 1.3 – Develop and promote world's best-in-class security practice and use this (carefully) in positioning, given the strong reputation Australia enjoys internationally for political stability, impressive regulatory and security track record and sound governance.

Initiative 1.4 – In line with the Government's stated commitment to visa simplification, examine opportunities to ensure Australia's visa system supports the economic goals for our nation, including by extending electronic visa fee-free entry to Priority Business Events attendees (see below).

⁷ AACB Submission to the Government Visa Simplification Consultation 2017

Government Partnership and Collaboration

A stronger framework for driving business events within government and a new style of partnership with industry

Business events warrant recognition as a key supporter of future employment, innovation and investment across the economy.

Beyond the immediate benefits of visitation, business events support employment creation and the development of competitive advantages in industries and regions. As marketplaces for business, for ideas and for knowledge transfer, they have been demonstrably

valuable in attracting investment, and enhancing science, health and technology linkages in particular. That said, the organisational arrangements (or lack thereof) and policy basis for business events have not changed since the 2008 National Business Event Strategy. Clearly, a refocus is required to enhance coordination and drive stronger partnership activity and deliver better outcomes for the country.

CSIRO Chief Executive Larry Marshall recently stated that “in every recession, in every evolution, in every major shift of the economy around the world, science has created the new industries that emerged from the turmoil and those new industries created new value that grew the economy. Those science-enabled industries created the jobs of the future.”

While scientific breakthroughs make the inroads to new development, it is through meetings and business engagement that the ideas are brought to life and commercialised – the knowledge translation.

The field of knowledge translation and implementation science is growing worldwide. Knowledge Translation is the science of bridging the gap between what we know and what we do. It involves multidirectional communication, interdisciplinary processes, ongoing collaboration, and includes all steps between knowledge creation and knowledge application. Improving knowledge translation is a priority for governments across the world. For example, Canadian funding agency mandates require researchers to engage with stakeholders, including policy and decision makers, practitioners, and consumers of services.

In Australia, knowledge translation is at an earlier stage and the structures and mandates present in Canada, for example, are not yet implemented. For instance, there is no funding or specific provision made for knowledge translation strategies that move beyond dissemination of research results. Unlike Canada, there is no requirement from funders for a detailed knowledge translation plan as integral to grant proposals.

Currently Australia ranks in the top 10 of OECD countries for research and development, but is the lowest country in the OECD for commercialisation of that

innovation. Clearly, Australian institutions and researchers are comparatively weak in taking research findings to market. The Australian research environment is increasingly supporting impactful research and governments are likely to follow approaches in other countries to report and evaluate research impact. By using knowledge translation concepts, knowledge exchange, including through events, becomes embedded in the process of research and development, thereby increasing its value and likely impact.

The business events sector can also play a significant role in facilitating the

transition from start-up to scale up – a link that is often missing for Australian innovations, initiatives and SMEs. Indeed, latest research shows that only 5.5 per cent of local companies use their new-to-market innovation and only 19 per cent of local firms copy someone else's innovation.

Australian governments have a role to play in optimising conditions for

small businesses to grow into medium enterprises. Although rarely receiving the proportional political or policy attention, medium and large businesses play a critical role in the economy given their competitive advantages through economies of scale. They are also more likely to innovate and export. Medium (20 to 199 employees) and large businesses (200+ employees) together employ 56% of Australia's working population but

account for only 5 per cent of the total number of businesses.

This new policy framework argues that business events can help seed future industries and, by providing a vehicle of support, assist small companies to grow into those that make valuable contributions to knowledge translation and jobs growth.

Meeting, sharing and adopting new business ideas is a weak link in our innovation and commercialisation ecosystem. Business events help provide a solution to this challenge by creating marketplaces for ideas and knowledge transfer.

Although there has been some recognition that the benefit of business events extends well beyond tourism, the fact that government support for business events, particularly for promotional activities has generally come through Tourism Departments has impacted on the industry's reach to extend outside tourism. Mr Leigh Harry, President of the International Congress and Convention Association (ICCA) stated that:

'the meetings and events industry should rightly be thought of as a key component in the global knowledge economy, rather than as a branch of tourism. It's all too rare that we are invited to sit at the main table when knowledge, education, scientific and medical advances are on the agenda, and spending a few days with visionary leaders from all sectors of business and academia reminded me of why we should be fighting for a permanent seat.' (ICCA)

The Australian Government has recognised the innovation and commercialisation challenge and in response has introduced an Industry Growth Centres Initiative. It is designed to drive innovation, productivity and

competitiveness by focusing on areas of competitive strength and strategic priority, and thereby assist Australia transition into smart, high value and export focused industries.

The Initiative is ongoing with \$238 million in Australian Government funding over the four years from 2017/18 to 2020/21. Growth Centres have been established to deliver the Initiative in six industry sectors of competitive strength and strategic priority:

- Advanced Manufacturing;
- Cyber Security;
- Food and Agribusiness;
- Medical Technologies and Pharmaceuticals;
- Mining Equipment, Technology and Services; and
- Oil, Gas and Energy Resources.

The Initiative seeks national action on key issues such as collaboration, commercialisation, international engagement, skills and regulation reform. While the Growth Centres are flexible in their approach to addressing barriers to success, they have been tasked with looking at four broad themes:

1. **Identifying regulations** that are unnecessary, or over-burdensome, for the key growth sectors and impede their ability to grow, and suggesting possible reforms;
2. Improving engagement between research and industry, and within industry, to achieve stronger coordination and collaboration of **research and stronger commercialisation** outcomes in the key growth sectors;
3. Improving the capability of the key growth sectors to **engage with international markets** and access global supply chains; and
4. Improving the management and **workforce skills** of key growth sectors.

Growth Centres are not-for-profit organisations, each led by a strategic board of industry experts who oversee the operation of their Growth Centre. Each Growth Centre has set a long-term strategy for its sector. Each also has a communication/public affairs function and are organising / participating in events related to their respective sectors.

Initiative 2.1 - The creation of a new Growth Industries Business Events Team that will join the business events sector, government, regional development coordinators, researchers and key growth industries together. The Team will be tasked to review and promote a forward business event pipeline and align activities including designating Priority Business Events, for concerted government support, trade agenda alignment (e.g. for every outgoing trade mission there is an incoming mission aligned with a targeted business event with potential to grow) and diplomatic campaign.

This coordinated team approach (diagram below) will optimise maximum potential economic benefit to Australia from these key growth industries, and create a stronger and more effective working partnership between the business events sector, industries, regions and government (including Austrade, Tourism Australia and Department of Industry, Innovation and Science). It establishes a top-line review and direction mechanism that

supports a joint ownership, efficient use of resources and shared goals. The new team would design and manage the Priority Business Events program, including assessment criteria, monitoring and evaluation.

Since large parts of the key growth sectors of the economy are regionally based, this initiative supports activation of business events in regional areas, bolstering capacity, supporting jobs

and generating growth. A key attribute of Priority Business Events would be the potential for regional participation, for example through satellite meetings, regional road trips, regional trade expos, regional attendee grants etc. This will enable regional industries and entire regions to showcase and nurture their areas of competitive advantage or excellence.

Improving the bid proposition and the number of high-value successful

There is potential to extend the current focus on bidding for existing business events to include public investment to drive growth through events activation – aligning industry and region skills, expertise and advantages to secure economic and community benefit from business events.

A new **Business Events Growth Facility (BEGF)** would provide funding support for two purposes:

1. **Attractor:** The attraction of nationally significant business events including the Priority Business Events initiative
2. **Activator:** The creation of new events that tap into our competitive

advantages in key growth industries and regional areas

This two-pronged approach will assist the business events sector and wider industry stakeholders to create new business events (capacity building) and attract nationally significant business events to Australia, including to regional locations (initially through satellite visits or sectoral outreach attached to major city events and Priority Business Events).

The Australian business events sector bids for a large number of events but success is variable and could be expected to be higher. According to 2017 AACB research, one in four association bids were lost due to geography and with corporate events, it is one in three (this factor might be expected to become less important as the global centre of business event activity moves closer to our region). One in every five bids lost were due to cost

factors (e.g. extra travel due to long haul and visa costs), so some financial assistance (public or private) could be expected to assist.

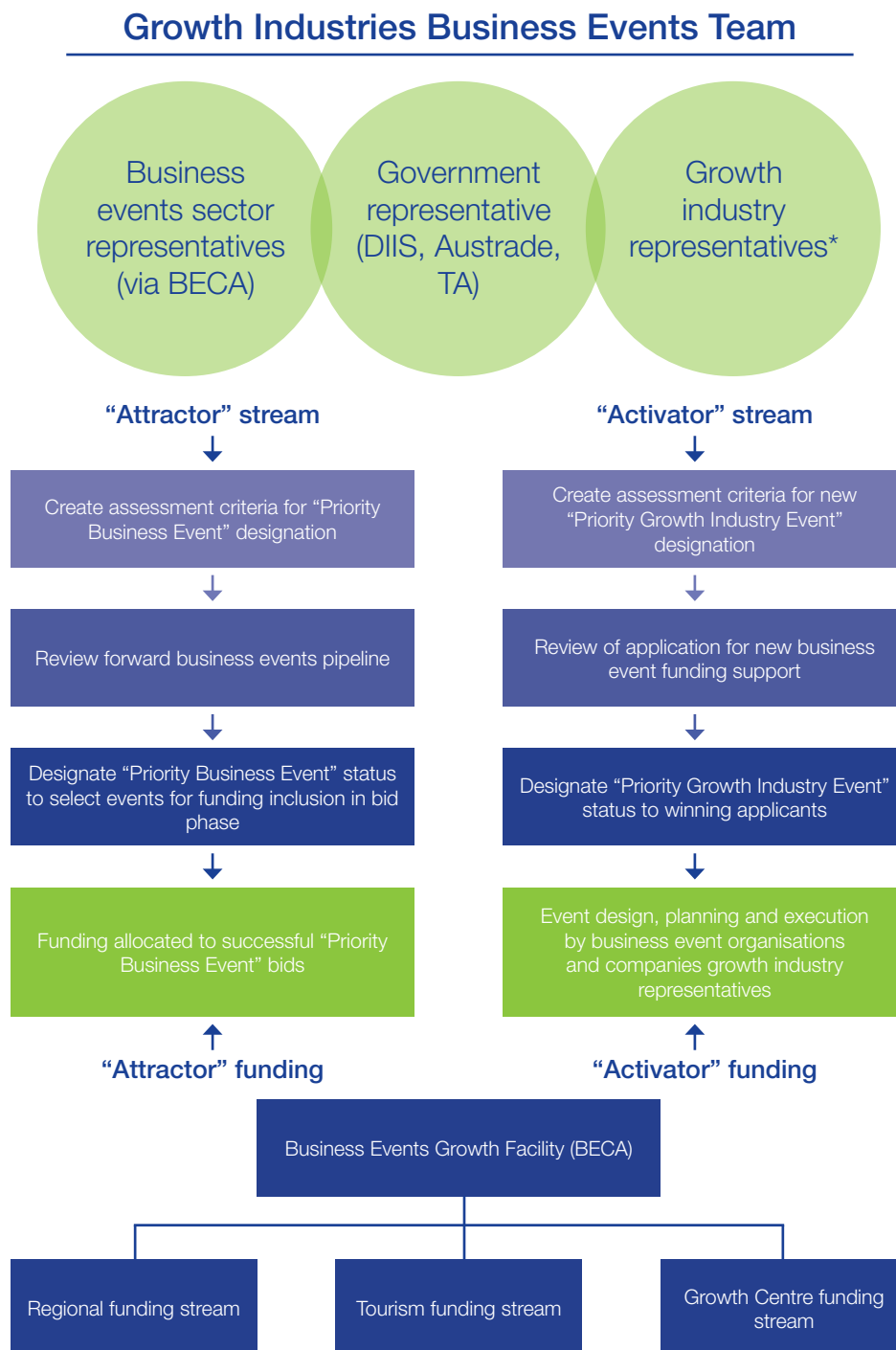
The discipline of bid prioritisation through the Growth Industries Business Events Team for the BEGF would drive efficiencies across the sector (the structure and approach of the new team and BEGF is presented in the diagram below). The criteria for event selection will need to be robust and the governance sound. The Growth Industries Business Events Team would have responsibility for determining the criteria for the selection of events for support from Government. Given the long lead-time for major events, this will need to be a forward-looking exercise and involve intelligence gathering and advocacy from the Government's international network (Austrade/Tourism Australia/DFAT).

Linked to these nationally significant events, the Activator element would support related events/outreach/satellite visits to regional areas and events that support the development of key growth industries, including through collaboration with the Growth Centres. This will enable industries and regions to showcase and nurture their areas of competitive advantage or excellence, and drive regional dispersal.

Initiative 2.2 - Establishment of a co-funded Business Events Growth Facility (BEGF) which can be tapped for the attraction of Priority Business Events and an activator of new business events in industries and regional areas of competitive advantage.

DIAGRAM 2:

Growth Industries Business Events Team & new Business Events Growth Facility



*For example, representatives from Growth Centres, industry bodies and regional leaders.

Naturally, the Attractor and Activator concepts will need to be further developed for operation by industry in collaboration with government. Key issues to determine include:

- Scope: Do they apply to new start-up events, growing existing events, or both?
- Coverage: Is the Attractor funding stream restricted to business events occurring in regional

Australia only, city events with a regional benefit, or both?

- Scale and proportion of funds
- Eligibility: What would eligibility requirements look like?

To ensure smooth operation and optimise outcomes, a pilot approach could be explored in 1-2 jurisdictions, prior to national rollout. (This approach has been successfully used with other Tourism 2020 initiatives.)

Initiative 2.3 - The business events sector commits to continued enhancements to the Event Ambassador model and seeks government commitment to the same.

Most states and territories use an event business ambassador or envoy model but as a country, our practice is inconsistent and of varying quality. There remain some intra and inter-state competition issues such as certain

states or territories using other state individuals as their representatives, which distract and deter collaboration at a national level. There is also potential to extend this model to apply to broader range of trade and expo events.

Sharing of good practice and the adoption of some simple protocols would enhance Australia's overall positioning in this highly competitive market.

Case study

PAX AUSTRALIA – ORGANISED BY REED EXHIBITIONS AUSTRALIA

OVERVIEW:

In 2012, the Interactive Games & Entertainment Association (IGEA) approached Reed Exhibitions Australia to discuss the potential of launching a video gaming event on behalf of their members. Since its first event in 2012, PAX Australia is now the largest community gaming event in the southern hemisphere, attracting international guests, speakers, developers and investors. Tony Reed, the CEO of Game Developers' Association of Australia has said that "PAX is the most significant event in our industry...especially at an international level. PAX's efforts have driven the industry forward."

QUICK HIGHLIGHTS:

- Membership of the IGEA has grown by over 50% since the launch of PAX Australia (2013)
- Business connections made at PAX Aus 2016 have led to a multi-million dollar investment in one Melbourne-based developer from an international games publisher
- Melbourne International Games Week - the largest digital games event in the Asia Pacific region – was created off the back of PAX, in partnership with the Victorian Government to place Melbourne on the global map as the digital games capital of Australia
- PAX supports the game developers of tomorrow by hosting the winners of the STEM Video Game Challenge, a national competition opened to students in years 5-12, learning about STEM (Science,

Technology, Engineering and Maths), to design and build an original video game based on STEM concepts

- Though its Association partners, PAX Aus have grown the number of Australian and New Zealand independent developers showcased at PAX from 36 in 2013, to 76 in 2016. According to the IGEA "the biggest challenge facing individual business growth is attracting investment for expansion, as well as early stage development funding". It is here that PAX assists independent games developers, with one Melbourne-based developer receiving a multi-million-dollar investment from an international video game publisher, following their presence at PAX Aus 2016.

See Appendix A for the full case study.

PILLAR 3:

Trade and Investment

Meet the current and future demand for business events and ensure Australia does not lose market share to its competitors, particularly in the Asia-Pacific region.

The strengths and benefits of Australia's open economy are well documented. Indeed, Australia has surpassed the Netherlands' modern record of 26 years of consecutive growth.

Australia is often called "the lucky country", and luck, particularly in our natural resources and location in the fast-growing region of the Asia-Pacific, has been important. But it has also been

about management of the economy and of key relationships. As Saul Eslake notes "... (we have) deftly played both sides of the China boom: the surging demand for raw-material imports while that lasted; more recently, the desire of the Chinese middle-class to eat well, travel and educate their children in English. With the exception of China itself, no country has benefited more from China's rapid growth and industrialization than Australia".

Will this continue? For business events in Australia, there are some mixed signs. The Government's 2017 Foreign Policy White Paper highlights that the global outlook for international trade and investment is uncertain, yet the Asia Pacific region continues to be resilient. Within this environment there are great opportunities.

While parts of the world are retreating and introspective, let us – Australia – step up and fill the void with those who want to meet, share knowledge and grow trade.

Initiative 3.1 - A reinvigorated focus on attracting investment into business events infrastructure.

Australia has used investment from domestic and overseas investors to grow our business event infrastructure and create the venues and attractions that build our offering for visitors. When foreign investors partner with Australia in businesses, it can also boost Australia's

skills and expertise, and create sustainable jobs for the future.

AMR International has described the global investment environment for the business events sector as a 'wall of money', with the world's largest private

equity funds, including Blackstone, Charterhouse and Providence, already heavily invested in show acquisitions and looking for more.⁹ And there are many other funds also looking for investment opportunities in the sector.

The recognised need to enhance our tourism infrastructure (to meet burgeoning potential demand identified in Tourism 2020) led to this sector being identified as one of the five priorities for investment attraction and promotion in 2013. Initial years' work had been focused on accommodation. An

⁹ Denzil Rankine, Founder and Executive Chairman AMR International - Exhibition and Event Association of Australasia 2017 Conference, 29 November 2017

extension of that focus to now include investment promotion and attraction for business events is highly recommended.

A global investment promotion effort could be led by Austrade with its network of 114 offices. This effort would need to be coordinated with Tourism Australia's marketing efforts and supported by new

investor market research, identification of priority projects and pipeline analysis.

A first point of development for this initiative should be a comprehensive audit of the Australian business events infrastructure, with particular focus on regional centres. This could be both hard infrastructure (properties, meetings

spaces, venue capacity etc.) but also soft infrastructure (skills, staff, workforce gaps) if it is to enable a meaningful end-to-end improvement in the sector's competitiveness and investment attraction.

Initiative 3.2 - A partnership between the business events sector and Austrade to inaugurate a new business events category at the Australia Export Awards.

There are a many award programs and events across the business events sector and tourism more broadly. However, there is little recognition in the export community and across large elements of political and economic leadership in Australia of the potential value of business events to Australia's export earnings and international positioning more generally.

It is recommended that a category for the most important international business event that has driven export revenue and has the potential to drive new jobs and exports be included in the 2018 Annual Export Awards. Through the Export Awards judging process and in consultation with BECA, each state and territory could be invited to nominate a qualifying business event.

Useful longer-term benefits of this initiative include the capture of vital sector intelligence and showcasing of Australia's business events capabilities through the process of nominating and judging the categories.

Identify segments in key markets that offer substantial growth potential for Australian exports and align with bid priority and effort

Initiative 3.3 - Program of inward trade missions and more formal relationship management in Australia's areas of competitive advantage.

While Austrade, DFAT and state governments host a range of events and trade and investment missions across their networks, there is no clear systematic or joined up approach to this activity. Austrade's efforts (through the Senior Trade and Investment Officials' forum) to develop a joint calendar is a useful starting point. A schedule of

existing meetings provides a natural spring board for a strategic program targeting international buyers and exhibitors to attend key existing events; for example, Fine Food, and Australian Healthcare Week.

This schedule can be developed together with the business events

sector and have it aligned to key growth industries through the Growth Industries Business Events Team. Further, the events could support the development of regional industries and promote visitation through specialist educational tours or satellite visits from the major city venues.

Case study

FINE FOOD AUSTRALIA – ORGANISED BY DIVERSIFIED COMMUNICATIONS AUSTRALIA

OVERVIEW:

With over 33 years' experience in the food industry, Fine Food Australia is Australia's leading trade exhibition for the foodservice, hospitality and retail industries, and strives to be the most important destination for any business in the foodservice and hospitality industries.

The annual show attracts over 1,000 exhibitors from Australia and the world, providing a platform for regional producers from around the country to showcase their products and services to a global audience. The event alternates between Sydney and Melbourne each September.

QUICK HIGHLIGHTS:

- 2017 event drew the highest attendance in eight years (Sydney) - 20% increase in visits: 23,762 in 2017 vs 19,617 in 2015
- Annual "Women in Hospitality" events to support the career development of women in the industry and raise funds to give back to community organisations
- Champions innovation in the industry through initiatives such as The Lions' Den; Start Up Hub; and the FIAL Innovation Zone
- Showcases and helps with skills development via long-standing competitions and awards
- The event attracts around 1,200 international buyers – around 200 through Austrade
- Many exhibitors are from regional Australia – the event opens up export markets to exhibitors especially in dairy, seafood, fruit and vegetables, seafood and grains
- New additions including the inaugural Commercial Drinks show which co-located with this year's Fine Food Australia, the two shows brought together the country's \$16 billion liquor industry with the \$170 billion foodservice and food retail industries, creating a formidable industry event.

See Appendix A for the full case study.

PILLAR 4:

Boosting the Visitor Economy

Drive demand, visitor spend, referral and repeat visitation

Deloitte Access Economics has described the business events sector as “a high-value, fast-growing component of the visitor economy”, where one in five dollars spent by international visitors in Australia is spent by an international delegate attending some form of business event. The latest review of tourism policy by the Productivity Commission, released in February 2015, found that government provision of international destination marketing and support for major sporting, cultural and business events can influence decisions to visit Australia. In addition, international delegates spend, on average, 21% more than other international visitors over the course of their trip – and 77% more per day.

The Australian Government's contribution to the business events sector lies primarily in its support for promotion and marketing activities of Business Events Australia (BEA), a unit within Tourism Australia (TA), and some policy support through the Tourism Division of Austrade.

TA's specialist unit, Business Events Australia, delivers partnership marketing and trade programs exclusively in the international business events market, targeting corporate meetings, incentives, exhibitions and association events for Australia. The team is represented in core markets around the world to present Australia to potential clients, tapping into the world's high desire to travel to Australia.

Support for TA to market Australia as a business events destination is provided on the policy basis that there is market

failure in the promotion of Australia. As no private business is able to gain the full benefit of such activity, marketing of Australia is undersupplied by the private sector.

TA's Business Events Australia strategy is to:

- Build global awareness of Australia as a sustainable business events destination
- Deliver a clear brand for business events in Australia and a marketing toolkit
- Deliver trade marketing programs that bring buyers face-to-face with sellers
- Provide industry access to research and market insights
- Provide industry leadership to promote ongoing development of a sustainable business events sector.

activity will ensure delegates stay longer and spend more, as well as enhance regional dispersal. The creation of the Growth Industries Business Events Team (see Pillar 2) will strengthen the relationship between the different areas of government and the respective efforts to deliver both demand and supply aspects of this framework.

This policy framework and implementation approach will assist in aligning the marketing and promotion of Australia's business event capabilities, with the initiatives, policy drivers and desired outcomes of government. In this respect, the business events sector still suffers from the same challenges as the broader tourism sector did before the industry and government worked more closely and effectively to develop and rollout the joint effort and measures of Tourism 2020.

Initiative 4.1 - In partnership with Tourism Australia, the business events sector and government need a greater focus on improving conversion of business event attendees from aspiration to visitation. This will include a coherent and consistent marketing framework to accentuate the appealing and key attributes of regions/communities/industries.

While marketing efforts such as Australia Innovates feature some excellent case studies, there is an opportunity to strengthen coordination with the agency, institute or research organisation behind each. Moreover, the responsibility for pre- and post-touring for business event visitors is mixed across all three levels of government. Better coordination of this

With Tourism 2030 under development, there is a real and timely opportunity to specifically address this for the business events sector.

Initiative 4.2 - The business events sector commits to work with government to develop a new program of business diplomacy.

As the Foreign Policy White Paper 2017 highlights “Globalisation means that soft power—our ability to influence the behaviour or thinking of others through the power of attraction and ideas—is becoming more important to Australia. By using soft power to help shape our external environment, Australia can better pursue its interests internationally.

In a globalised and contested world, a systematic and sophisticated approach to soft power is in our national interest. To maintain our strengths in this area, and to ensure our capabilities and areas of focus keep pace with changes in technology, the Government will conduct a review to ensure we continue to build soft power and exercise influence effectively.”

Into this review process, BECA proposes a new face-to-face business diplomacy initiative to support, supplement and complement existing efforts, particularly those associated with digital transformation and the shifting focus on technology. This initiative could also the Government's interest in attracting

global talent to Australia and using that talent to promote knowledge translation here.

Foreign Minister Julie Bishop has said economic diplomacy should change the approach of government, to more closely engage with the private sector, the business community, and non-government organisations in all out work.

“To achieve this, we will be harnessing broader aspects of our international diplomatic work to promote trade, encourage economic growth, attract investment and support business” Minister Bishop stated.

When the Government's Economic Diplomacy initiative was released in 2016, the four pillars were Trade, Growth, Investment, and Business.

The stated purpose of the Business pillar was to: Advance the interests of Australian business overseas, the development of a stronger private sector in our region, and promote Australian tourism.

The Government pledged it was committed to supporting Australian businesses in Australia and overseas. Moreover “We promote Australian tourism in line with the Government's Tourism 2020 strategy.”

An up-to-date review of the business engagement under this pillar finds scant reference to the importance of international conferences, meetings and business events.

It is timely to address this, working with the foreign affairs and trade portfolios, and other government agencies. To succeed, the initiative should be undertaken with the support of state and territory governments and championed by the heads of Australia's convention bureau and the business events sector.

The practical ways in which the process for bidding for business events would change in this new model with these measures is best illustrated through the use of two diagrams – see Appendix C & D.

PILLAR 5:

Local Skills and Employment

Continue to enhance Australia's competitiveness and attractiveness as a business events destination, including through stronger service offerings.

Business events are important drivers of the local and national economy but suffer from a fragmented approach to workforce development, training and employment issues. To reach the sector's full potential, government and the business events sector organisations need to jointly address workforce skills and education issues by:

- refocusing careers advice mechanisms and support networks recognising that more than 50% of secondary students now go to their parents for career advice
- expanding professional development and accreditation programs;
- strengthening relationships with secondary and tertiary institutions and private training providers;
- fostering vocational education through industry training organisations
- developing clear education articulation pathways;
- fostering appropriately trained sector practitioners to deliver practical education and training; and
- improving course content to ensure relevance.

In addition to the specific education, skills and training challenges facing the business events sector, there is a more general one facing the nation – the loss of confidence in and aspiration for vocational careers.

Australia is suffering from a chronic shortage in vocationally trained employees. This is surprising given the recently released figures showing that you are more likely to get a job and be

paid more in your chosen field of vocation as compared to a university education.

Skills required in the business events industry are varied and can be highly prized. Australia has been recognised worldwide for its expertise and professionalism in the delivery of events and for producing experienced event managers and production professionals.

To gain evidence regarding the workforce challenges, Meetings & Events Australia, along with industry partners, the Australian Association of Convention Bureaux and the Exhibition & Event Association of Australasia, carried out research into the events industry, including to identify skill shortages.

The Australian Workplace Skills Survey for the Events Industry Sector¹⁰ found there is both a shortage of skilled people available to work in the events industry and also a clear opportunity to create much needed employment – especially for young Australians and people from other industries seeking to transition to a new career. The opportunity exists to demonstrate and deliver a professional career pathway for the industry from entry level through to executive management.

Initiative 5.1 - Provide a variety of education, development and career pathways for the business events sector. In particular, develop a systemic approach and linkage between the business events sector and tertiary providers.

Whilst the skills and roles within the sector are extensive, the survey findings identified there were chronic skills shortages in the following roles in the event industry:

1. Event Management – Mid level
2. Sales
3. Event Management – Senior level
4. Business development
5. Technicians (audio visual and IT)

As a Registered Training Organisation (until 2024), Meetings & Events Australia is working with government and industry to deliver specific training throughout the cities and in regional areas to address the skills needs of the business events sector and create new employment avenues and career pathways for Australian workers.

As an example, based on the findings of this research, Meetings & Events Australia developed an online learning platform that could be accessed by students from all across Australia that allows them to study at their own pace and in their own time. The course also provides for face to face learning from industry practitioners, industry inclusion and networking (see case study below).

Case study

MEETINGS & EVENTS AUSTRALIA (MEA) – REGISTERED TRAINING ORGANISATION

OVERVIEW:

Meetings & Events Australia has confirmed its status as a Registered Training Organisation until 2024 and launched a new Diploma of Event Management (SIT50316) as part of a new education and professional development model for the events industry.

This model

- provides flexible learning in event management
- combines practical training from industry experts with online learning
- designed to enable students to manage their study around their work commitments.

Students from all over Australia have the opportunity to study what they want, at their own pace and in their own time from their desktop or mobile devices. Students can start the Diploma course anytime throughout the year and the curriculum also allows students to select the course subjects that best support their career goals.

Diploma students receive an annual MEA Student Membership giving them access to professional development and networking events held in each state and territory.

Findings of the 2016 Australian Workplace Skills Shortage Survey of the Events Industry highlighted a large skills gaps in the sector for experienced event managers at both the mid and senior levels. MEA subsequently developed this course to help fill these gaps.

See Appendix A for the full case study.

There is value in strengthening the links between business events and key educational institutions. In some states, for example, in New South Wales, the International Conference Centre (ICC) invites students to participate in selected conferences. As well as knowledge translation, the experience gives the students some strong vocational insights.

TAFE NSW Sydney has partnered with companies to secure professional development for students through a combination of in-class lectures, online resources, industry immersion and networking. In March 2016, Sydney TAFE and the Exhibition and Event Association Australasia (EEAA) jointly launched the Excelling in Exhibitions Program. Developed as a direct result of

intensive industry consultation with the EEAA, the program offers those in the exhibitions industry the opportunity to develop their skills, enhance their career, and remain at the forefront of excellence in exhibitions (see case study below).

Case study

SYDNEY TAFE & EEAA'S EXCELLING IN EXHIBITIONS PROGRAM

OVERVIEW:

The Excelling in Exhibitions program is a customised, tailored program for those already in the exhibitions industry, focused on nurturing innovation, improving transferable skills, retaining staff, and providing career pathways. Flexibility is built into the program to ensure minimum impact on work and other commitments. The program is delivered as a series of workshops, with webinar and online sessions throughout (all with the support of trainers) to compile a portfolio of evidence and tasks for assessment.

The Excelling in Exhibitions program is a customised, tailored program for those already in the exhibitions industry, focused on nurturing innovation, improving transferable skills, retaining staff, and providing career pathways. Flexibility is built into the program to ensure minimum impact on work and other commitments. The program is delivered as a series of workshops, with webinar and online sessions throughout (all with the support of trainers) to compile a portfolio of evidence and tasks for assessment.

Many of the trainers are from the business events sector, ensuring that the course content is current and reflecting best practice. This unique training program targeted those seeking to gain practical and valuable knowledge and skills that can be immediately transferred to their current roles and future

ambitions. The focus is on industry best practice and improving skills that meet the requirements of a both a national qualification and a rapidly growing industry that contributes significantly to the Australian economy. The program has now been rolled out in Sydney, Melbourne, Adelaide, Perth and the Gold Coast.

Students participate in site inspections that link classroom learning to the reality of events. Sector experts from numerous organisations including Accor, ATP, Powerhouse Museum and Cockatoo Island showcase their venues and share their experiences during visits. Following these experiences project event students inspect potential venues, negotiate contracts and build business relations. This practical experience really develops their skills and is a model for roll out across Australia, including in regional areas. Research conducted by TAFE NSW found that there were no dedicated exhibition relevant qualifications or programs in Australia.

Focused on nurturing innovation, improving transferable skills, retaining staff in the sector and providing career pathways, this unique program ensures training was relevant and met the future needs of the business events sector. A strength of the program was its development with input from EEAA and training delivery for staff ranging

from entry level operatives to senior exhibition managers. Twelve leading exhibition management companies and service providers including Exhibition Trade Fairs (ETF), Info Salons and Reed Exhibitions participated along with pre-eminent exhibition venues including Luna Park Venues and Sydney Showgrounds. With over 110 enrolments, the program has been delivered in two states and exceeded participation by 48%.

Overall feedback was excellent with an average 90% satisfaction on program content, delivery, the trainers and sector presenters. One participant said the training was the “most relevant course I have done to date” with participants commenting on the value of being involved in a tailored exhibitions program with the business events sector professionals.

“Accessible education is important to all areas of the workforce: but is particularly critical to a relatively new industry such as events management, as it has become increasingly professionalised in recent decades.” - Jen Howley, Group Manager, Event Services Info Salons Australia.

See Appendix A for the full case study.

Initiative 5.2 - The business events sector commits to work with the Skilling Australians Fund to Identify, monitor and over time prioritise business events training and employment.

To date, the business events sector has had a wide range of employment initiatives in train complemented by a training agenda through Meetings & Events Australia (MEA) as a Regional Training Organisation (RTO) – see Case Study above.

In the 2017 Budget, the Government established a new Skilling Australians Fund to ensure that businesses that benefit from employing skilled migrants are also supporting training for Australians. Through the Fund, an

estimated \$1.5 billion will be provided over the first four years to underpin a new partnership with State and Territory Governments to train Australians, with spending prioritised towards apprenticeships and traineeships. The Fund, when matched with State and Territory funding, will support up to 300,000 apprentices, trainees, pre-apprentices and higher level skilled Australians.

As a sector that employs talent from around the world - often to meet the

demand for multilingual skills – the business events sector needs to be central to the rollout and performance of the Fund. Monitoring this with clear Key Performance Indicators for employment outcomes could be one of the early priorities of the Growth Industries Business Events Team.

Conclusion

Beyond the immediate benefits of visitation, business events can be key drivers in industry creation, longer-term diversified employment and regional development. They have been demonstrably valuable around the world in attracting investment and enhancing entire economies. Properly managed and supported by well-developed policy aligned to Australia's competitive strengths, they have the potential to be a key supporter of the required diversification of our economy.

In many instances, the business events market operates effectively and no case exists for further public-sector investment. However, there are specific areas where we are not reaping important public benefit, including to maximise the commercialisation and export potential in our key growth industries. Importantly, a focus on these areas unleashes a new wave of support for the development of regional Australia.

To realign the brief for business events in Australia in a way that ensures optimal value for the Australian community, the call for greater government investment is warranted. Other supporting measures can be achieved with little or no extra funding and are more about the coordination or leveraging of activities underway across business and government.

We must be mindful that immediate action is required to stop any further erosion of Australia's competitive position in this highly valuable global sector. Australia is currently at great risk of missing out on the "wall of money" that is seeking investment in the business events sector and, if that money goes elsewhere, we consign the nation to a more limited future. This new policy framework is a meaningful first step in ensuring this does not happen.

Detailed Case studies

PAX AUSTRALIA – organised by Reed Exhibitions Australia

Tony Reed, CEO, Game Developers' Association of Australia "PAX is the most significant event in our industry...especially at an international level. PAX's efforts have driven the industry forward."

HIGHLIGHTS:

- Membership of the IGEA has grown by over 50% since the launch of PAX Australia (2013)
- Business connections made at PAX Aus 2016 have led to a multi-million-dollar investment in one Melbourne-based developer from an international games publisher
- Melbourne International Games Week - the largest digital games event in the Asia Pacific region – was created off the back of PAX, in partnership with the Victorian Government to place Melbourne on the global map as the digital games capital of Australia
- PAX supports the game developers of tomorrow by hosting the winners of the STEM Video Game Challenge, a national competition opened to students in years 5-12, learning about STEM (Science, Technology, Engineering and Maths), to design and build an original video game based on STEM concepts
- The video game industry in Australia is now worth over \$2.9 billion a year (up 4% on PY) and sales of video games now exceed movie box office receipts in Australia.

PAX is the dominant force in the Australian consumer gaming event

space and boasts everything related to video gaming, console gaming, PC gaming, hand-held gaming and table-top gaming, combining exciting international and local content with community events, international guests, speakers, musicians and developers: making PAX the largest community gaming event in Australia.

In 2012, the Interactive Games & Entertainment Association (IGEA) approached Reed Exhibitions Australia to discuss the potential of launching a video gaming event on behalf of their members. PAX exploded onto the Australian exhibition scene in 2013 and has continued to hold its position as the largest community gaming event in the southern hemisphere since.

Through joint initiatives and continued collaboration with its partners, the IGEA, Game Developers Association of Australia (GDAA) and the Victorian Government, PAX has prospered and developed into a large-scale international industry event, recognised today on the global gaming calendar as part of Melbourne International Games Week. Membership of the IGEA has grown by over 50% since the launch of PAX Australia, which now accounts for all major Australian publishing and distribution businesses.

PAX is part of the Penny Arcade Expos, the largest video gaming festivals in North America. Organised by ReedPOP,

a quirky offshoot of Reed Exhibitions, in conjunction with Penny Arcade Inc and supported by the Victorian Government, it forms the consumer component of Melbourne International Games Week.

Strong growth in the Australian gaming industry continues, however as consumer behaviour changes, the role of PAX Australia has become more important to Australian-based publishers and distributors. Traditional retail sales of games fell 16% in 2016 vs 2015, with the offset being a 19% increase in digital sales. With this shift in consumer behaviour, PAX' pivotal role in giving fans hand on experiences with the latest games is more important than ever as they shift towards purchasing games digitally, without in store experience or trials.

Through its Association partners, we have grown the number of Australian and New Zealand independent developers showcased at PAX from 36 in 2013, to 76 in 2016. According to the IGEA "the biggest challenge facing individual business growth is attracting investment for expansion, as well as early stage development funding". It is here that PAX assists independent games developers, with one Melbourne-based developer receiving a multi-million-dollar investment from an international video game publisher, following their presence at PAX Aus 2016.

EVENT LEGACIES:

Gaming, of the non-gambling kind, is big business. The video game industry in Australia is now worth over \$2.9 billion a year (up 4% on PY) and sales of video games now exceed movie box office receipts in Australia. Video games are played by 67% of all Australians, and the average age of a video game player is 34, the same average age of the PAX attendee. 97% of homes with children have computer games.

PAX Australia is the largest consumer show in the Australasian region, and as an internationally recognised brand, brings with it a significant amount of global prestige, global press and opportunity.

The event supports the wider growth and development of the industry, now and into the future, through various activities, including:

- Providing networking and trade opportunities by co-locating numerous trade and social events that form part of Melbourne International Games Week, a PAX, Association and Government initiative
- Curating and underwriting space known globally as PAX Rising, to support over 70 independent game developers from Australia
- Introducing government bodies, in particular the Classifications Board, to new and emerging technologies with exclusive show floor tours so they gained a better understanding of what's coming to ensure classification is handled appropriately, enabling members to be able to promote new games and platforms with increased ease
- Providing an eSports arena on the show floor to showcase new games within eSports (an explosive growth market) and gaming competitions
- Working with the Association, the Attorney General's Department and the Classification Board to change legislation regarding classifications and viewing unreleased games
- Providing a net percentage of revenue back to the Association to help fund industry development
- PAX also works closely with the Victorian Government, who have, on the back of PAX, introduced Melbourne International Games Week - the largest digital games event in the Asia Pacific region - linking a range of businesses, education and entertainment in a week-long extravaganza of gamification, to place Melbourne on the global map as the digital games capital in Australia. The event also includes a series of industry B2B events such as Unity's Unite Conference (a games education Summit) and the Game Developers Asia Pacific Conference (GCAP)
- Additionally, PAX supports the game developers of tomorrow by hosting the winners of the STEM Video Game Challenge, a national competition open to students in years 5-12, learning about STEM (Science, Technology, Engineering and Maths), to design and build an original video game based on STEM concepts
- Driving international profiling and recognition to the industry and Melbourne as the gaming hub of Australia. The event draws high-

calibre media attendance, with over 450 of the most influential games media in Australia and New Zealand in attendance who delivered over 125 million media impressions.

FINE FOOD AUSTRALIA – organised by Diversified Communications Australia

HIGHLIGHTS:

- 2017 event drew the highest attendance in eight years (Sydney) - 20% increase in visits: 23,762 in 2017 vs 19,617 in 2015
- Annual “Women in Hospitality” events to support the career development of women in the industry and raise funds to give back to community organisations
- Champions innovation in the industry through initiatives such as The Lions’ Den; Start Up Hub; and the FIAL Innovation Zone
- Showcases and helps with skills development via long-standing competitions and awards
- The event attracts around 1,200 international buyers – around 200 through Austrade
- Many exhibitors are from regional Australia – the event opens up export markets to exhibitors especially in dairy, seafood, fruit and vegetables, seafood, and grains.

With over 33 years’ experience in the food industry, Fine Food Australia is Australia’s leading trade exhibition for the foodservice, hospitality and retail industries, and strives to be the most important destination for any business in the foodservice and hospitality industries.

The event presents new and innovative products from around Australia, and from over 45 countries internationally, as well as live demonstrations, masterclasses and industry recognised competitions. The annual show attracts over 1,000 exhibitors from Australia and the world, providing a platform for regional producers from around the country to showcase their products and services to a global audience. The event alternates between Sydney and Melbourne each September.

The visitor target audience is broken into five key segments:

- Food service - includes owners, managers, chefs, baristas from restaurants, takeaways, hotels, cafes
- Catering - includes high volume foodservice outlets such as caterers, canteens, aged care and healthcare kitchens
- Bakery - includes owners and buyers from bakeries
- Retail - includes owners and buyers from supermarkets and independent grocers
- Import / export - includes importers, exporters, food and beverage distributors.

An ever-evolving and iconic event, Fine Food Australia 2017 launched several

new additions, including the inaugural Commercial Drinks show. Co-located with this year’s Fine Food Australia, the two shows brought together the country’s \$16 billion liquor industry with the \$170 billion foodservice and food retail industries, creating a formidable industry event.

Fine Food’s ongoing commitment to industry innovation accelerated in 2017 through a series of new events, including The Lions’ Den; Start Up Hub; and the FIAL Innovation Zone.

The 2017 event exceeded all financial and non-financial targets. It was the biggest in its long history (14% increase in sqm from previous Sydney event), with the largest number of exhibitors ever, and the best attendance figures in Sydney in over eight years (20% increase on previous Sydney event). Exhibitor and visitor satisfaction also confirmed success, with a 9% increase in exhibitor satisfaction, 95% visitor satisfaction and a visitor net promoter score of +25 (compared to an industry standard of +5).

EVENT LEGACIES:

The event supports skills development in the industry and the jobs of today and tomorrow, with long-standing competitions and awards. These include the Nestlé Golden Chefs Hat Awards and Bakeskills. New for 2017 was the Worldskills competition, which showcased apprentice skills across cookery and butchery, as well as a series of initiatives supporting those new to the

industry, including The Lions' Den; Start Up Hub; FIAL Innovation Zone.

Fine Food Australia also runs an annual 'Women in Hospitality' charity event to support the career development of women in the industry. In 2017, the event raised \$3,172 for the Outback Spirit Foundation, which aims to help aboriginal enterprises raise money to grow and market native "bush" foods. And in 2016, the charity event raised

\$3,000 for Dress for Success Sydney and the Daylesford Primary School Kitchen Garden Programme.

The event also supports the needs of disadvantaged Australians by donating unwanted and leftover furniture to the Launch Housing initiative, which furnishes housing for people experiencing homelessness, and providing a collection point for financial donations to the initiative.

Meetings & Events Australia (MEA) - Registered Training Organisation

Meetings & Events Australia has confirmed its status as a Registered Training Organisation until 2024 and launched a new Diploma of Event Management (SIT50316) as part of a new education and professional development model for the events industry.

This model provides flexible learning in event management, combining practical training from industry experts with online learning. This course is designed to enable students to manage their study around their work commitments. Students from all over Australia will have the opportunity to study what they want, at their own pace and in their own time from their desktop or mobile devices. Students can start the Diploma course anytime throughout the year and the curriculum also allows students to select

the course subjects that best support their career goals.

Students are supported by an experienced trainer who will guide and assist them in completing the course. Two day workshops addressing specific units are scheduled every ten weeks for students to attend in person or via an online link. These Workshops provide practical knowledge and showcase case studies and experiences from experts working in the events industry. The Workshops are also open to non-diploma students, who simply wish to update their skills and gain new knowledge.

Diploma students receive an annual MEA Student Membership giving them access to our professional development and networking events held in each

state and territory at reduced rates.

The Diploma course is part of the career pathway offered by Meetings & Events Australia to grow and nurture young event professionals. This pathway includes professional development, mentor and scholarship programs to build on the skills needed by the industry.

Findings of the 2016 Australian Workplace Skills Shortage Survey of the Events Industry highlighted a large skills gaps in the sector for experienced event managers at both the mid and senior levels. MEA subsequently developed this course to help fill these gaps.

Business Event supporting case studies

23rd World Congress on Intelligent Transport Systems, 2016

Host organisation: ITS Australia on behalf of ITS Asia Pacific

HOST ORGANISATION DEFINITION:

ITS Australia represents the interests of the national Intelligent Transport Systems industry, promoting the development and deployment of advanced technologies to deliver safer, more efficient and sustainable transport.

ITS Australia represents more than one hundred organisations including governments, industry, academia and start-ups. Affiliated with peak ITS organisations around the world, ITS Australia is a major contributor to the development of the industry and host of two ITS World Congresses.

STRATEGIC OBJECTIVES:

The strategic objects are set out by the ITS World Congress Board:

- Engage all stakeholders
- Raise political and general public awareness of ITS
- Create an environment to support widespread deployment of ITS
- Lift the awareness and understanding of ITS in other aligned disciplines
- Actively support student engagement in ITS World Congress activities.

The 2016 ITS World Congress exceeded expectations and achieved the strategic objectives.

DELIVERY:

- Local Organisation Committee involved more than 50 organisations representing government, industry and academia ensured engagement from leading ITS and aligned organisations, to implement the World Congress strategic plan, explore new opportunities and deliver a successful event
- As a Club Melbourne Member, World Congress Project Director, Dean Zabrieszach leveraged local and international networks to ensure industry support and build awareness
- Working closely with the international ITS community, the International Program Committee, comprising ITS Asia Pacific, ITS America and ITS Europe-ERTICO collaborated to ensure the Congress program, activities and networking was of the highest standard
- To ensure high quality of international visitors, global engagement was significantly enhanced by engaging regional delegate boosting hubs, consistent international marketing and communications messages and support from Australian and Victorian Trade commissions
- Australian Prime Minister Malcolm Turnbull officially opened the Congress, with Federal, State and local Government Ministers, Mayors and officials fully engaged in the program

- Strong state and local government support across all activities, stakeholder Pavilions, business functions and VIP events.

OUTCOMES/LEGACIES:

- More than 11,500 delegates, exceeding the anticipated number of 7,000 attendees
- All continents, and more than 70 countries, represented
- The largest international association conference in Australia in 2016
- The second largest congress ever in Melbourne
- \$25 million benefit to the economy
- 100 international Ministers, Mayors, senior representatives and advisors attended the High-Level Policy Roundtable, an invitation only meeting, hosted by the Australian Federal Government
- A number of connected and automated on-road trials, pilots and initiatives announced at and immediately after the Congress
- Connecting Australian industry with international markets, stimulated business opportunities, multiple Memorandums of Understanding (MOUs), industry confidence to play a global leadership role, increased profile and enhance reputation

-
- Connections with schools, universities and learning institutions through the numerous student programs
 - Heightened community awareness following two open for public days and community programs
 - Key Congress themes and messages captured in ITS Australia Report 'Smart Transport for Australia' with insights from industry thought-leaders, a focus on Australia considerations and future business opportunities
 - Increased ITS Australia membership, greater local industry profile and recognition, strong government, member and stakeholder relationships enabling greater communication, collaboration and cooperation.
-

Asia-Pacific Association for International Education Conference 2016

Host organisation: Asia-Pacific Association for International Education – APAIE

HOST ORGANISATION DEFINITION:

APAIE is an international non-profit organization whose goal is to activate and reinforce the internationalization of higher education in the Asia-Pacific region and around the world, and to engage the professional challenges of individuals in international education.

THE ASSOCIATION PROBLEM:

- Achieve greater cooperation amongst those responsible for international education
- Facilitating harmony & advancement of the Asia-Pacific region institutions to enable promotion of the quality international programs and activities.

THE SOLUTION:

- Club Melbourne Ambassador Professor Susan Elliot of the University of Melbourne led the bid which brought together nine Victorian universities to collaboration and co-shot the conference
- Each university hosted specialised tours throughout the conference.

OUTCOMES/LEGACIES:

- Attendance at the APAIE conference has been growing year on year and attendance in Melbourne was significantly higher (188%) than anticipated attracting 1,674 delegates from 46 countries, reflecting the global interest in attracting international students
- The large exhibition that accompanied the conference attracted 90 exhibitors, 83 of which were international and included universities from Russia, France, USA, Germany and across the Asia Pacific.

20th International Aids Conference 2014

Host organisation: International AIDS Society (IAS)

HOST ORGANISATION DEFINITION:

IAS is the world's largest association of HIV professionals, with members from over 180 countries working on all fronts of the global AIDS response. Together they advocate and drive urgent action to reduce the global impact of HIV.

THE ASSOCIATION PROBLEM:

- HIV interventions and policy strategies need to be tailored to specific population and country
- In the context of advocacy, there was recognition that greater support of Key Populations is needed, especially in countries where discriminatory policies and legislation are hindering prevention and treatment efforts
- Create maximum impact of the event in Australia, a country with a relatively low HIV/AIDS infection rate
- Ensure African delegates attend the event.

THE SOLUTION:

- Ensure the right people and organisations were involved in the planning and delivery of the conference. The Local Co-Chair, Professor Sharon Lewin, was connected with the Club Melbourne Ambassador Program and through this network she was able to generate engagement from local leaders of various institutes and universities to boost local support and increase the promotional channels overseas
- Delegate boosting into the Asia Pacific region
- In February 2014 a Ministerial' Roundtable, including all state Health Ministers and other stakeholders, was held to discuss Australian priority issues for the conference, debate about the potential legacy for Australia Health Policy beyond the conference, and to identify pre-and post-conference partnerships that would showcase Australia's HIV and AIDS response.

OUTCOMES/LEGACIES:

- Melbourne public embraced the congress with 6,000 people visiting the Global Village
- Several key policy changes can be attributed to the hosting of AIDS 2014 in Melbourne
- The AIDS 2014 Legacy Statement, signed by all health Ministers in Australia, commits to the virtual elimination of new HIV transmission in Australia by 2020, and takes a strong stance on the elimination of HIV-related stigma and discrimination. The Legacy Statement influenced Australia's 7th National HIV strategy which was released at AIDS 2014
- At the international level, the Local Co-Chair, with the support of the MPG and other stakeholders was able to facilitate a process which resulted in the removal of Australia from UNAID's list of countries with HIV-related travel bans.

World Cancer Congress 2014

Host organisation: Union for International Cancer Control (UICC)

HOST ORGANISATION DEFINITION:

Unite the cancer community to reduce the global cancer burden, to promote greater equity and to integrate cancer control into the world health and development agenda.

THE ASSOCIATION PROBLEM:

- Developing specific time-bound targets and indicators to measure the national implementation of policies and approaches to prevent and control cancer
- Raising the priority accorded to cancer in the global health and development agenda
- Promoting a global response to cancer
- Grow attendance and membership.

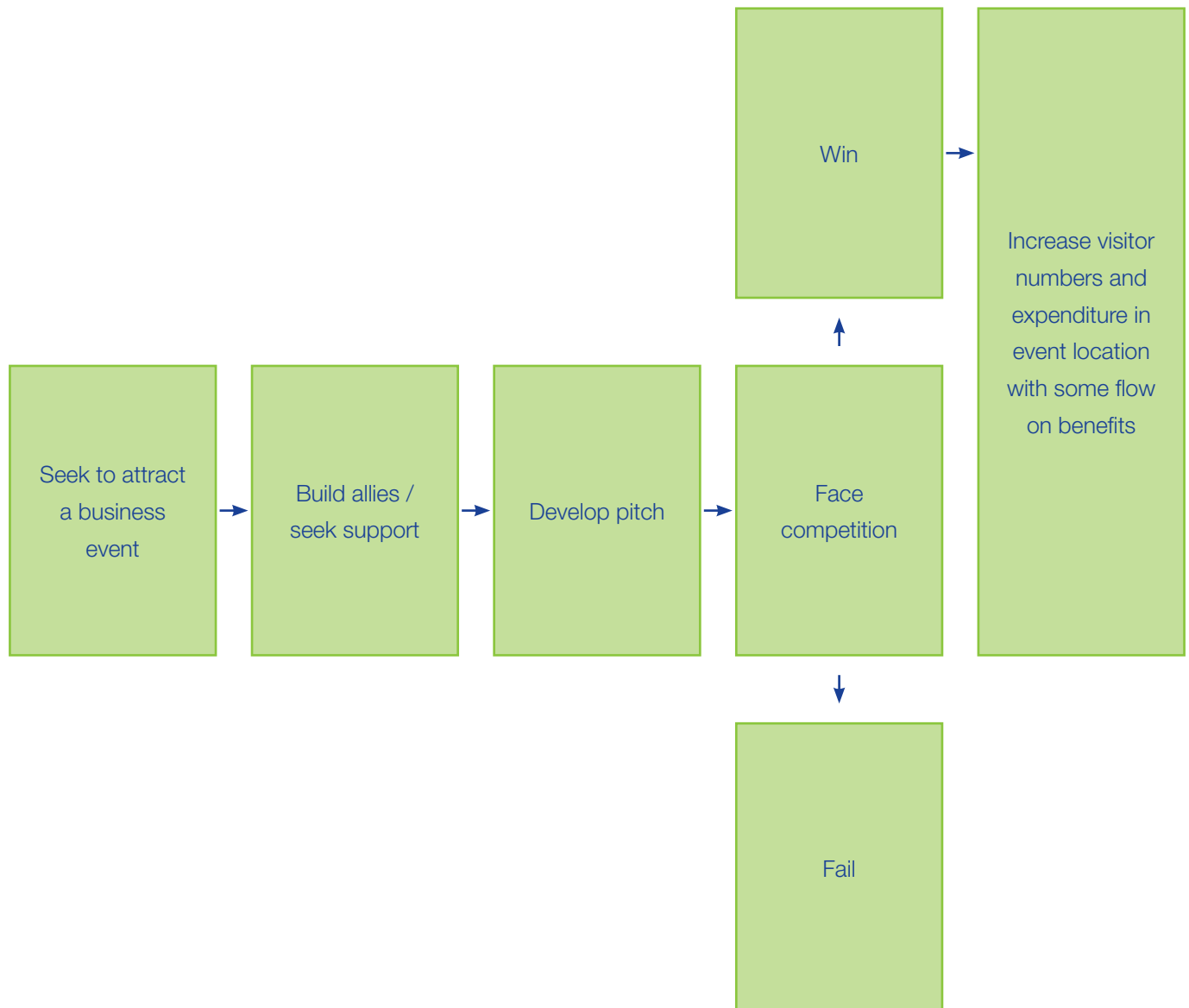
THE SOLUTION:

- Facilitated collaboration to leverage Melbourne's intelligence. Brought together State and local government, Cancer Council Victoria and Australia, Club Melbourne Ambassador Program, MCEC and tourism industry
- Through these partnerships delegates were able to visit Melbourne's world leading cancer research and treatment facilities such as Walter and Eliza Hall Institute, Royal Children's Hospital, Olivia Newton John Cancer and Wellness Centre and Peter McCallum Cancer Centre.

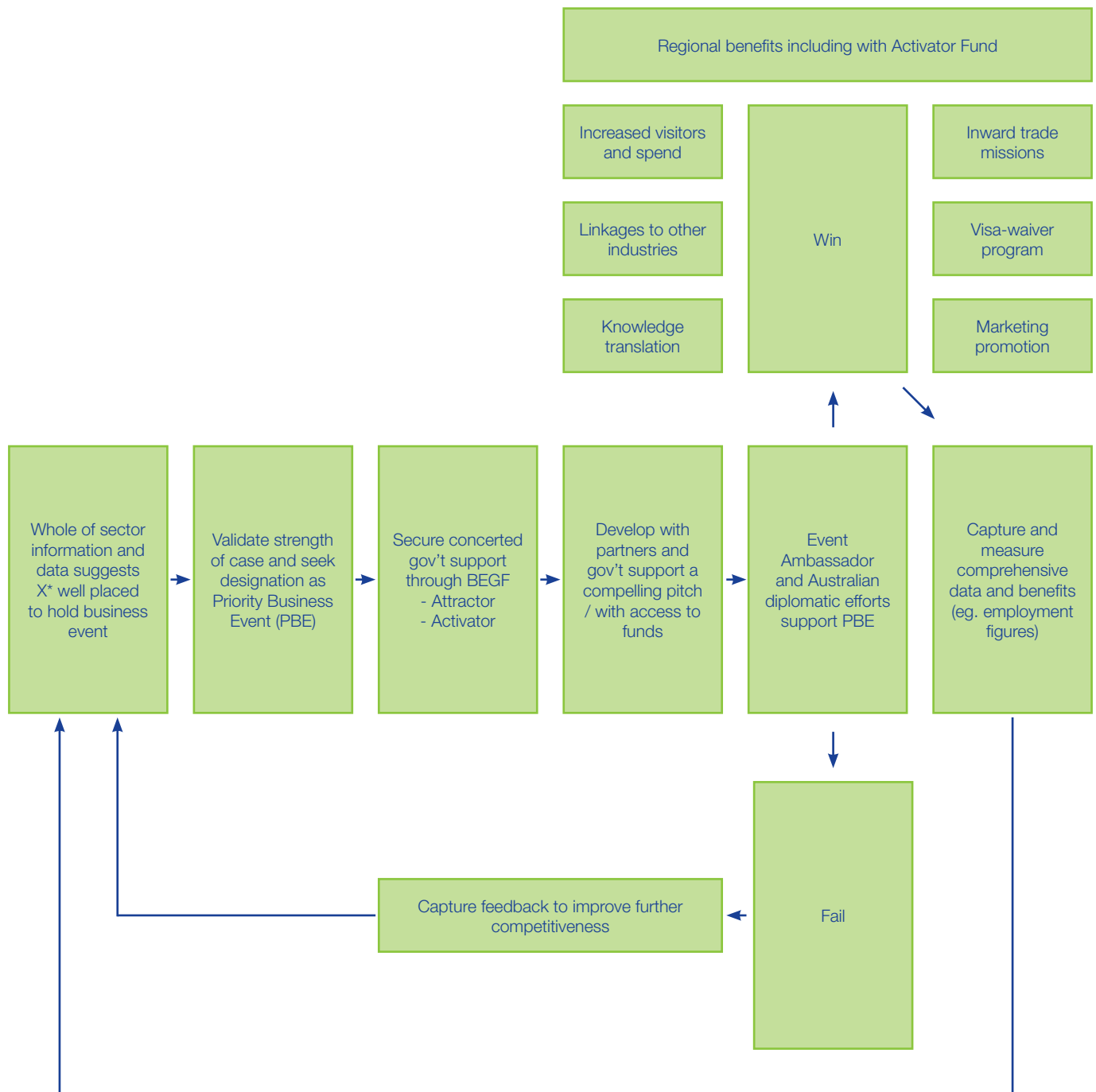
OUTCOMES/LEGACIES:

- Facilitation of collaboration and education
- The WHO in partnership with UICC launched a new guide to prevent and control cervical cancer
- Cancer Council Australia in partnership with Prostate Cancer Foundation of Australia and UICC launched new draft guidelines Prostate Specific Antigen testing
- Funding support abstracts submitted describing programs to build public support to fund or donate to cancer control causes
- Delegate attendance up by 35% from previous event
- UICC won the Association Award for Conference Development, off the back of the Melbourne meeting
- Club Melbourne Ambassador and member of the Congress organising committee, Professor Sanchia Aranda was appointed President-elect of UICC during the Congress and appointed CEO of Cancer Council Australia in 2015.

Current Bidding Process



Future Strategic Bidding Process



* X represents a location or industry sector