



Major Australian Convention Centres

COMPARISON REPORT

Canberra Convention Bureau

Introduction

The purpose of this report compiled by the Canberra Convention Bureau is to present a general overview of the major Australian Convention Centres compared to National Convention Centre Canberra in terms of:

- » capacities;
- » historic, current and planned expansions and refurbishments;
- » proximity to accommodation, CBD and airport;
- » ownership and operational models;
- » development, economic impact; and
- » general destination appeal and infrastructure.

Notes:

The following summary tables 1 and 2: outlining convention centres in Australia as at January 2012 is recommended to be read in conjunction with the Australia Forum Scoping Study, April 2011 by Ernst & Young and Cox.

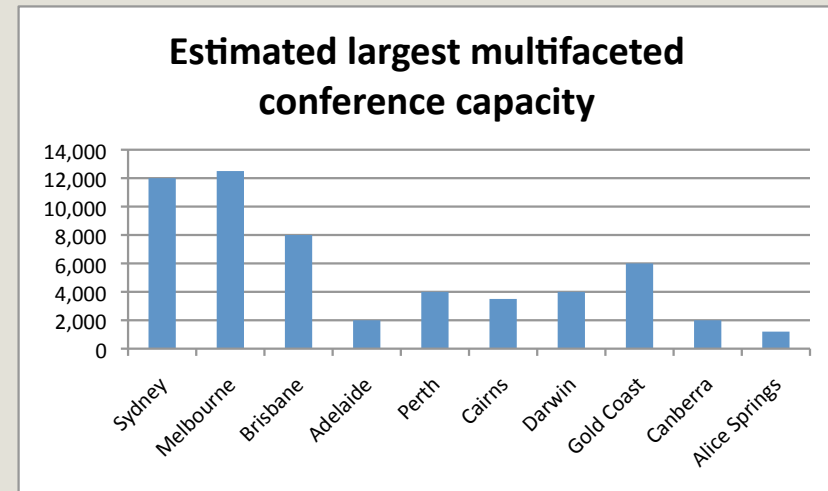
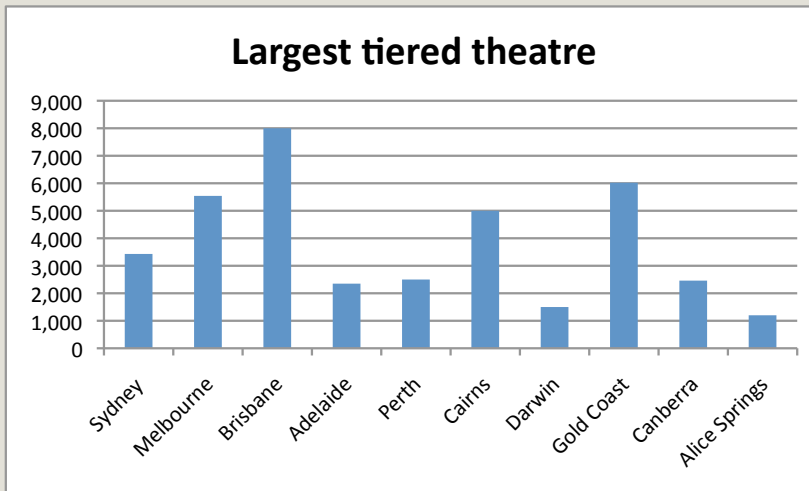
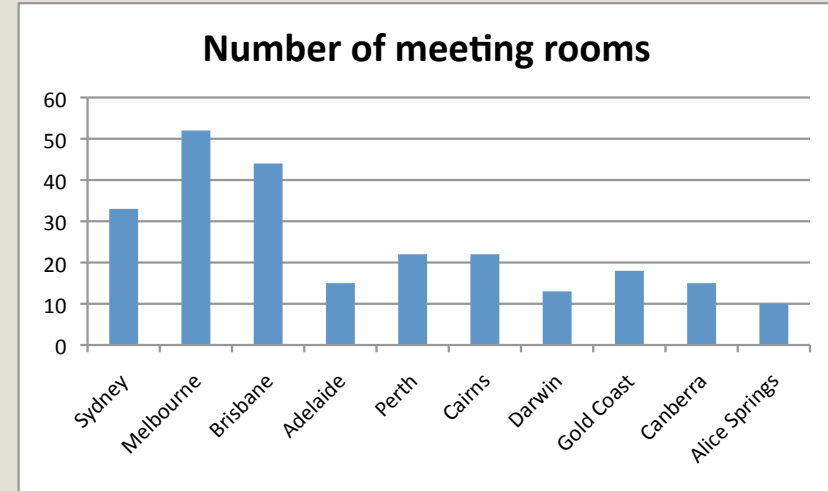
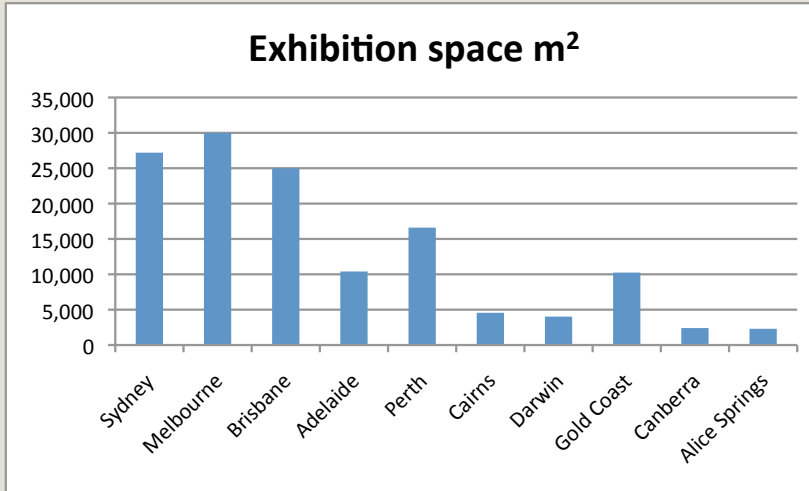
Table 3: General Destination Appeal (excluding the business case for bidding on a specific event) and Infrastructure Comparison of Major Australian Conference Destinations as at 2010 has been included to provide a fuller picture of destination comparisons as convention centres do not operate in isolation and rely heavily on support infrastructure, particularly accommodation and transport (excerpt from Canberra Convention Bureau's 2010 competitor analysis).

Table 1: Major Australian Convention Centres Data as at January 2012

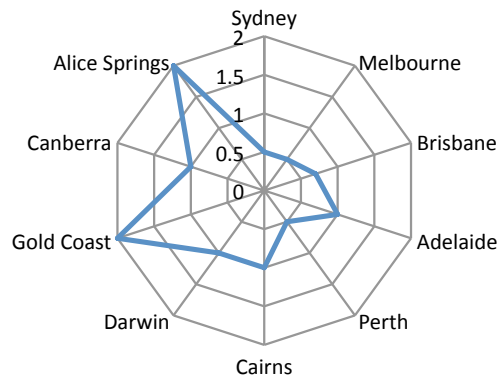
	Sydney	Melbourne	Brisbane	Adelaide	Perth	Cairns	Darwin	Gold Coast	Canberra	Alice Springs
Year open	1988	2009	1995	1987	2004	1996	2008	2004	1989	2002
Initial cost and historic refurbishments/ Expansion cost (historic \$ value)	\$287m + \$ 57m extension (1999) + \$ 50m 5-year ongoing refurbishments	\$500m	\$170m + \$ 140m addition (opened Jan. 2012)	unknown + \$ 17.5m extension (1990) + \$ 92.4m development (2001)	\$220m	\$50m + \$30m development (1999) + \$11m refurbishment (2004–2005)	\$110m	\$127m + \$40m extension (2009)	unknown + \$30m refurbishment (2008)	\$10.8m + \$ 500k annual refurbishments
Current investment planned (p) or under construction (c) + year finished	\$2–3b (p 2016)	\$242m exhibition extension (p 2014)	n.a.	\$350m (c 2017)	n.a.	\$6.4m refurbishment (c)	n.a.	n.a.	n.a.	n.a.
Exhibition space m ²	27,200	30,000	25,000	10,400	16,600	4,560	4,020	10,246	2,400	2,300
Number of meeting rooms	33	52	44	15	22	22	13	18	15	10
Largest tiered theatre	3,430	5,541	8,000	2,350	2,500	5,000	1,500	6,020	2,460	1,200*

	Sydney	Melbourne	Brisbane	Adelaide	Perth	Cairns	Darwin	Gold Coast	Canberra	Alice Springs
Estimated largest multifaceted conference capacity (total of meeting rooms capacity)	12,000+ (20,450)	12,500+ (13,679)	8,000 (13,068)	2,000+ (10,422)	4,000+ (22,264)	3,500+ (8,200)	4,000 (6,670)	6,000 (8,730)	2,000+ (4,425)	1,200 (1,828)
Parking space	900 on-site, under-cover, charged	1,060 on-site, undercover, charged	1,500 on-site, undercover, charged	1,200 on-site, undercover, charged	1,500 on-site, undercover, charged	239 on-site, undercover, charged	300 on-site, undercover, charged	1,400 on-site, undercover, charged	260 on-site, undercover, charged	400 on-site, free of charge
Proximity to accommodation (3–5 star) (as publicised by convention centres/bureaux websites)	23 hotels, 5,393 rooms within 1 km	2 hotels (adjacent), 2,001 rooms within 0,25km 40 hotels in CBD within 3km	10 hotels, 1,061 rooms within 1km	38 hotels, 4,500 hotel rooms within 3km	13 hotels, 1,600 rooms within 1 km	13 hotels, 2,183 rooms within 1km	14 hotels, 1,800 rooms within 1 km	8 hotels, 1,800 rooms within 1km 8,028 rooms within 3km	5 hotels, 890 rooms within 1 km	4 hotels, 594 rooms within 1km (65 rooms under development)
Proximity to CBD	0.5km	0.5km	0.7km	1km	0.5km	0.5–1km	0.5–1km	1–2km	0.5–1km	2km
Proximity to airport	14km	21.5km	17km	6.8km	12–17km	7.1km	15km	19.2km	7.2km	11.2km

*Theatre capacity applies to a flat floor space. Venue does not have a tiered theatre.



Proximity to CBD (kms)



Proximity to airport (kms)

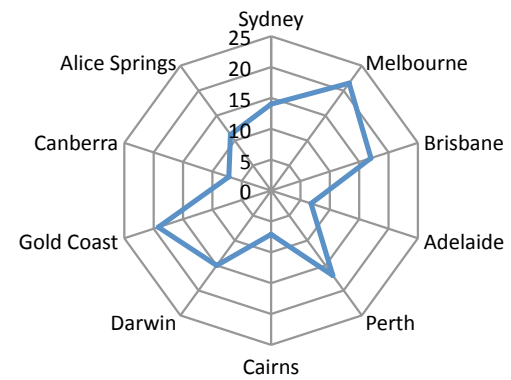


Table 2: Convention Centres Expansion/Refurbishment Projects and Ownership/Development/Economic Impact Data

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
Sydney	<p>Sydney Convention and Exhibition Centre opened in 1988.</p> <p>In 1999 the Southern building was built.</p> <p>There are six exhibition halls, 1 – 5 are each 5,000sqm totalling 25,000m². The largest theatre capacity is 3,450pax.</p> <p>Sydney Convention & Exhibition Centre has continuously undergone upgrades and renewal projects.</p> <p>One of Australia's largest digital screen display systems has been installed. More than 150 LCD display screens are now located throughout the Centre.</p> <p>Major new development currently planned and expected to be ready in 2016.</p> <p>Minimum development requirements:</p> <ul style="list-style-type: none"> » 40,000 m² exhibition space; » 10,000 delegate and 12,000 sports and entertainment events capacity; » At least one new high-quality hotel. 	<p>Ownership/operation structures:</p> <p>Sydney Foreshore Authority is responsible for the entire Darling Harbour precinct on behalf of NSW Government. The Convention Centre operation is managed by Darling Harbour Convention and Exhibition (DHCE) Pty Ltd, a company owned by CCM (Convention Centre Management Pty Ltd), which is in turn owned by Accor Asia Pacific (60%) and Compass Group (Australia) (40%). Accor Asia Pacific is wholly owned by its parent company, French-based Accor SA, the world's largest hotel and tourism corporation. Compass Group (Australia) Pty Ltd is a subsidiary of the global Compass PLC food services organisation.</p> <p>Development:</p> <p>Original development was funded as a Bicentennial project by the NSW Government with the assistance of the Australian Government. The NSW Premiers Department was the lead agency, with the NSW Government establishing the Darling Harbour Authority and providing an exemption to the planning Act. The project was dubbed "a national project for Australia". NSW directly invested \$950m with a further \$1.431b in private sector investment. The Bicentennial Authority, enacted by the Australian Government, provided matched funding for state governments to undertake major capital works programs. However, the contribution to the Darling Harbour project is unclear.</p> <p>The NSW Government formed a panel in 2011 to manage the requirement to expand Sydney's convention facilities.</p> <p>Infrastructure NSW (INSW) is managing the delivery of the 12-hectare world class convention, exhibition and entertainment precinct at Darling Harbour on behalf of the NSW Government.</p> <p>Expressions of interest for the \$2–3 billion redevelopment of South Darling Harbour closed 11/11/2011. The procurement timetable indicates that after an interactive process with the shortlisted proponents the selection of the preferred bidder will be made known in October 2012.</p> <p>Three consortiums have made the shortlist, a request for proposals is due to be issued in March 2012:</p> <ol style="list-style-type: none"> 1. Destination Sydney (Lend Lease, AEG Ogden, Spotless, Capella Capital and InfraRed Capital Partners)

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
Sydney		<p>2. Key Partners (Laing O'Rourke, John Laing Investments, Macquarie Capital Group, GL Events and Honeywell)</p> <p>3. VeNuSW (Plenary Group, Brookfield Multiplex Services and Suntec International Convention & Exhibition Services)</p> <p>Redevelopment is expected to be finished by the end of 2016.</p> <p>Attached as an appendix is also a PWC report outlining the economic case for development of expanded facilities for Sydney.</p> <p>Economic impact:</p> <p>No current economic impact data is available from The Convention Centre as the operator is under embargo due to the tender process for the proposed new development.</p> <p>The estimated delegate/visitor expenditure in 2009/2010 financial year by market segment for domestic and international business:</p> <ul style="list-style-type: none"> » International Conferences/Congresses \$141 million » Exhibitions \$79 million » Domestic Conferences \$279 million » Other \$2 million » Total \$501.1 million <p>The estimated economic benefit of new development is an additional \$160–270m annually.</p>

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
<p>Melbourne</p>	<p>The Melbourne Exhibition Centre (known as Jeff’s Shed) opened in February 1996 and consisted of 30,000m² of exhibition space at a cost of about \$129m. It was fully integrated with the Melbourne Convention Centre in 2009 and trades as MCEC. The renovation offers 30,000m² of uninterrupted exhibition area and a 5,550 seat, six-star energy rated Convention Centre. The complex also includes:</p> <ul style="list-style-type: none"> » a five star Hilton Hotel with 396 rooms, 26 suites and 32 apartments; » an office and residential tower; » a riverfront promenade of retails shops, including cafes, bookstores and wine merchants; » a premium brand homemaker retail complex; and » an investment in public spaces including a partnership with the National Trust for a revitalised Maritime Museum. <p>Other developments in Melbourne include: the \$128m Melbourne Recital Centre; the \$65m enhancement of Crown Towers which includes new conference facilities for 840 delegates (up to 19 concurrent rooms on one floor).</p> <p>Expansion of the exhibition facilities is planned within the next two years. The new convention centre development agreement provided for ‘land banking’ to enable the expansion of exhibition facilities.</p>	<p>Ownership/operation structures:</p> <p>Replacing the World Congress Centre Melbourne (opened in May 1990.) The new Melbourne Convention and Exhibition Centre was developed using a Public Private Partnership (PPP) agreement, with the Victorian Government owning and funding the convention centre at about \$500m, through the Melbourne Convention and Exhibition Trust (MCET) – a Government owned trust authority which had oversight of the existing and new convention facilities and reports to the Tourism Minister.</p> <p>Development:</p> <p>The development was managed by Major Projects Victoria as part of the Vic Government. An agreement was entered into by Victorian Government to provide finance to MCET to be paid back over 25 years.</p> <p>The consortium who were successful in tendering for the 8ha site were tasked with building the convention centre – integrated with existing exhibition facilities, land banking space for expansion of the exhibition facility and developing a high volume upscale hotel (which is now the Hilton). The developer could propose what they wanted with the remaining 8ha site and the total development was estimated at about \$1.4b. The Government was very clear about what they wanted in the convention centre and a 500 page functional brief was produced for this purpose.</p> <p>The developer took the risk on construction and the Government, through the MCET, began quarterly payments over 25 years once the centre opened.</p> <p>Not all elements of the final retail and commercial product on the site have been financially strong and there have been some issues with consortium partners, unrelated to the convention centre operation.</p> <p>Leigh Harry, formerly CEO of MCET and now CEO of Tourism Victoria, at our request, presented this case study in Canberra during August 2011 to ACT Government and others. Mr Harry has offered to provide further advice in the future to ACT Government.</p> <p>Economic impact:</p> <p>The Convention Centre is expected to stimulate Victoria’s economy by \$197 million each year for 25 years.</p> <p>Almost 1800 jobs were created during the construction period and MCEC will help to generate additional employment of around 2,500 jobs over the operating period.</p> <p>The centre recently released first quarter figures for 2011–12, 15% up on previous high record.</p>

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
<p>Brisbane</p>	<p>Brisbane Convention and Exhibition Centre (BCEC) on Merivale Street commenced construction with the demolition of the old Expo car park site in March 1993. The Exhibition Centre was completed in April 1995 and opened with its first show in May 1995. The Convention Centre was completed in May 1995 and was officially opened on the 6th June 1995.</p> <p>Refurbishment program is currently underway. The program includes refurbishment of the Ballroom and general services and facilities throughout the centre (eg: visitor centre, technology).</p> <p>Expansion BCEC on Grey Street, opened on 25 January 2012. Cost \$140m.</p> <p>The commencement date could probably be taken as January 2007 with the appointment of the architect and an approved design. The Project Manager was also appointed at this time. Due to budget issues, the builder was not appointed until June 2009.</p> <p>The five level, 25,000 square metre expansion is designed specifically for small and medium sized conferences and houses some of Brisbane’s most impressive banquet- ing venues including the Sky Room and Terrace with views of the city skyline.</p> <p>The addition of 20 meeting rooms and event spaces including two tiered auditoria for 400 and 600 in BCEC on Grey Street provides the Centre with the capacity to host a minimum of 300 extra events per year (1000 total).</p> <p>The five levels of boutique meetings and event space, bringing the total meeting and event spaces to 44, including three standalone tiered plenary halls able to accom- modate from 400 – 8,000 people. The new facilities are designed to cater for the average sized conference (400–800pax), which is lacking at the moment with the current facilities.</p> <p>Total development is 24,000m² and will have access to over 800 hotel rooms, retail and restaurant hub and art and cultural precinct.</p> <p>Designed by convention centre specialist architects, Cox Rayner, BCEC on Grey Street has a 5 star green equivalent rating. A sky-lit atrium provides natural light throughout the building, enhanced by the dramatic facade which is 85% glass.</p>	<p>Ownership/operation structures:</p> <p>Both linked centre buildings are owned by South Bank Corporation on behalf of the State of Queensland. South Bank Corporation is the State Government’s develop- ment agency for the South Bank Precinct. South Bank Corporation reports directly to the Premier of Queensland.</p> <p>The operation model is that the Centre is owned by South Bank Corporation and managed by AEG Ogden. AEG Ogden operates all services within BCEC internally.</p> <p>Development:</p> <p>BCEC on Merivale Street was in the majority funded by the sale of a casino licence in Brisbane for approximately \$180 million. The remaining funding was through the state government. BCEC on Grey Street construction has been funded directly by the State of Queensland.</p> <p>Economic impact:</p> <p>Economic impact of the Centre’s operation for the 2012 financial year is expected to be slightly under \$300 million. The economic impact on commencement was around \$150 million and then quickly rose to around \$200 million per year.</p>

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
Adelaide	<p>General refurbishment of the Adelaide Convention Centre including new restaurant, new entry and general upgrading has occurred since opening. Exhibition facilities were also substantially expanded.</p> <p>An exhibition hall was added in 1990 at a cost of \$17.5m.</p> <p>Latest building (10 000m² multipurpose flat floor, subdivisible halls plus 3 meeting rooms) was completed in 2001 at a cost of \$92.4m.</p> <p>The new expansion consists of two phases. The first includes the construction of 4300m², subdivisible space and additional meeting rooms. The second proposes the demolition of the original building to be replaced by the construction of a 3000 seat, flexible plenary hall that can be converted to flat floor space and additional meeting rooms.</p> <p>Phase 1 commenced late 2011 is expected to be completed in 2014. Phase 2 commences 2015 to be completed 2017. Both are to be constructed above railway lines contributing significantly to costs.</p> <p>Cost Phase 1: \$242m Cost phase 2: \$108m Total: \$350m</p>	<p>Ownership/operation structures:</p> <p>The centre is wholly owned by the SA Government The Adelaide Convention Centre Corporation was formed as a subsidiary to the Minister of Tourism by regulations issued under the Public Corporations Act 1993. The Chief Executive reports to a Board appointed by the Minister and then on to the Minister.</p> <p>Development:</p> <p>The project is being directly funded by the state government as an equity injection. The centre is expected to run on an operationally viable basis.</p> <p>Economic impact:</p> <p>The independent economic analysis indicates the project will have a significant positive economic benefit for South Australia; and will achieve a direct expenditure benefit-cost ratio of 4.59. Over the next 25 years it is estimated the \$350 million investment will generate \$1.92 billion (\$76 million per annum) in additional economic benefit for the state from delegate spend and associated pre- and post-event tourism. It will also generate around 1,784 additional jobs in South Australia per year (both directly and indirectly) over the same period.</p> <p>See appendix 1 – press release indicating historic economic impact financial data.</p>

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
Perth	<p>The Perth Convention and Exhibition Centre (PCEC) was the first building as part of a broad based construction site. Additional rail construction followed to one side of the building. There are also issues with availability of parking and insufficient accommodation room stock generally in Perth due to the mining boom (with consequential high pricing for accommodation). These issues have all limited optimisation of this facility in its early years.</p> <p>There has been no major refurbishment since opening in 2004.</p>	<p>Ownership/operation structures:</p> <p>Perth Convention and Exhibition Centre (PCEC) was built as a PPP and has a publicly quoted development cost of \$220 million (2004). Whilst the project was 20 years in gestation, construction took approximately 2 years from ground-breaking to opening in August 2004.</p> <p>PCEC is now 100% privately owned and operated. A private investment company, Wyllie Group, holds a 35 year head lease over the property; and Spotless holds an operating licence with the initial term expiring in 2014. Spotless holds the option to extend this license in five-year increments throughout the remainder of the life of the head lease.</p> <p>Spotless is responsible for all sales and marketing activities and the provision of venue and catering services. The state holds no direct financial interest and provides no financial support directly to the operation of the facility.</p> <p>The private sector contract arrangements are considered both complex and generally considered by industry to be the least optimal model in Australia for convention centres, resulting in multi layered interests that are not necessarily aligned with WA State or Perth city interests.</p> <p>Since development the WA Government has sought to address the market failure for this ownership model, after much controversy, by providing additional and substantial funding for umbrella marketing to the Perth Convention Bureau.</p> <p>Also, car parking, the financial backbone of most Australian Centres, is separately operated by the Perth City Council and this has created both financial and operational issues for the centre as parking is largely taken up by city office workers, this locks out both revenue and parking availability to the centre.</p> <p>Economic impact: \$63m annually for 35 years</p>

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
Cairns	<p>The Cairns Convention Centre has had a two stage development:</p> <ul style="list-style-type: none"> » stage 1 opening in 1996 at a cost of \$50m (1996 dollars) » stage 2 opened in 1999 at a cost of \$30m (1999 dollars) <p>In 2004–05 a \$11m refurbishment of stage 1 took place.</p> <p>Currently \$6.4m is being spent on refurbishments and upgrades:</p> <ul style="list-style-type: none"> » New audio-visual and communication equipment » Upgrade of Wi-Fi » Extension of the Outdoor Plaza » Painting and new carpet – Hall 2 » New signage system » Additional environmental features » Major kitchen upgrade 	<p>State Government owned asset with AEG Ogden contracted to operate.</p> <p>Centre reports generating \$80–\$100m pa in economic impact. In 15 years report \$700m in direct economic expenditure and provided 1.5m room nights (with early years recording a lower economic impact than current annual figures).</p>

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
Darwin	<p>Construction of the Darwin Convention Centre started in early 2006 and the centre opened in June 2008.</p> <p>Since 2008 an additional 713 accommodation rooms have been added to the accommodation inventory with the opening of the new Vibe Hotel and Medina Apartments at the Darwin Waterfront precinct. The 'Skywalk' connecting the waterfront precinct's hotels and the Darwin Convention Centre with the city centre has also opened.</p> <p>Future expansion is not scoped or costed.</p> <p>Refurbishment costs are not available as these are factored into the overall uniform (with CPI) availability payments made to the Concession Holder.</p>	<p>Ownership/operation structures:</p> <p>The ownership and operating structure is similar to the current Sydney Darling Harbour Foreshore Authority model.</p> <p>The Convention Centre was part of the \$1.1 billion Darwin Waterfront project (Darwin Cove Consortium). The reported capital cost of the Convention Centre to the NT Government was \$110m (2005 dollars) and was developed under a PPP model. AEG Ogden is the management partner.</p> <p>(NT Government established the Waterfront Precinct Authority which takes responsibility for entire 25-hectare lifestyle precinct site including; wave lagoon, wharf apartments, hotels, al fresco restaurants, retail outlets, wide open parklands, a cruise terminal and beach.)</p> <p>Delivery model: 25 year build, own, operate and transfer (BOOT) arrangement with private sector responsible for finance, design, construction, operation and maintenance. A design and construct contractor was engaged by the Concession Holder to deliver the facility. The Concession Holder has contracted with an Operator and with a Facilities Manager for the 25 year concession period.</p> <p>Economic impact data is not currently collected by the Darwin Convention Centre. However, PWC did original projections in 2003 for the NT Government:</p> <p>Research suggested that based on 12,000 non-local delegates per annum an incremental tourist spend of \$193m (2003 dollars, real discount rate of 6%) with increase in GSP of \$139m would be achieved over 20 years. In its reports the Concession Holder has quoted average expenditure per non local delegate at \$3,468 taken from the NT Tourism June 2009 survey. The estimated economic impact for 2011 based on 11,468 non local delegates is \$39.8m. PWC estimated 161 new jobs in the convention and tourism sector and flow through effects.</p>

	Historic/Announced Expansion and Refurbishment Projects	Ownership/ Development Model/ Economic Impact
Gold Coast	<p>The \$127m Gold Coast Convention and Exhibition Centre officially opened on 29 June 2004, after 5.5 years for planning and construction.</p> <p>The Centre was expanded at a cost of \$40 million, funded by the Queensland Government, and re-opened in January 2009 – adding two extra exhibition halls bringing total exhibition space to 10,000 m², a registration office, three meeting rooms and three new kitchens (bringing the total number of kitchens to 12).</p> <p>There is now capacity to cater for conferences of up to 6,000 delegates including 6,000 seat arena divisible into 3 spaces, 6,000 m² of exhibition space divisible into 4 halls and 18 meeting rooms of varying size and registration offices.</p>	<p>The Gold Coast Convention and Exhibition Centre (GCCEC) is owned by the Queensland State Government, and was built by Jupiters Ltd (part of the TABCORP group), who retain operational management of the centre and have links via a covered walkway to Jupiters casino.</p> <p>Economic impact:</p> <p>Construction of the GCCEC created some 3050 full time jobs during development and a further 50 permanent and 150 casual jobs when the centre opened for business. There was additional employment flow on effect on the Gold Coast:</p> <ul style="list-style-type: none"> » 3000 jobs generated during construction over two years generating \$150 million. » 1560 jobs once operational, an additional \$85m in GSP per year. » 79 local firms have worked on the development and construction of the project worth \$99.41 million. <p>\$34m / 60,000 room nights per year</p>
Canberra	<p>The National Convention Centre Canberra (NCCC) opened in 1989 and the much needed \$30m refurbishment was completed in October 2007 (after being closed for parts of 2006 until October 2007).</p> <p>While the refurbishment has greatly enhanced the quality of the facility the capacities haven't changed. Therefore NCCC lacks enough space to accommodate larger conferences (with medium to larger exhibitions) or more than one multifaceted average size conference (500–600pax) at a time. Capacity constraints result in relatively low economies of scale compared to other Australian conference facilities and therefore the facility is less price competitive. During high demand conference months the facility cannot maximise opportunity resulting in a loss of potential business to the city.</p>	<p>The NCCC is an ACT Government owned asset with IHG contracted to operate. Full financial and market analysis and economic impact data is included in the Australia Forum scoping study by Ernst and Young and Cox.</p>
Alice Springs	<p>The Alice Springs Convention Centre has had no significant upgrades since opening in 2002 and no future expansion being scoped or costed. Ongoing refurbishment costs are \$500k per annum.</p>	<p>Ownership/operation model:</p> <p>The Concession Holder (Ford Dynasty Pty Ltd) is also the operator of the Alice Springs Convention Centre. The capital cost to NT Government was \$10.8m (2001 dollars) with the centre being completed in 18 months in 2002.</p> <p>Delivery model: 20 year BOO (Build/Own/Operate) arrangement with Lasseters owning the facility at the end of the 20 year concession.</p> <p>Economic impact: No information available on visitor spending.</p>

Table 3: General Destination Appeal and other complementary Infrastructure Comparisons, excluding industry expertise, of Major Australian Conference Destinations (excerpt from Canberra Convention Bureau's competitor analysis 2010)

	Average Room Rate (ARR) and Accommodation Capacity*	Transport	Destination Appeal promoted to Business Events Clients
Adelaide	ARR – \$140.36 Properties: 100 Rooms: 6,699 Five Star: 4 Four Star: 39 Three Star: 39 Below Three Star: 13 Ungraded: 5	<ul style="list-style-type: none"> » New \$260m terminal at Adelaide Airport opened in 2005. Domestic and international flights operate regular daily services. International air services operate between Adelaide and London, Kuala Lumpur, Fiji, Bali, Singapore, Los Angeles or Auckland. » Adelaide is the central hub on the Australian National rail system and National Highway one, linking WA with Eastern Australia. » Regular bus, train and tram services operate daily throughout Adelaide. 	<ul style="list-style-type: none"> » Compact city centre with easy access ("20-minute city") and close proximity between meeting venues, accommodation, shopping and dining. » Internationally recognised as a top business travel destination. » Fabulous festivals and events. » "Green" conference destination with electric trams and a solar powered bus. » Well-known and highly regarded wine regions close proximity to Murray River, the ocean and Kangaroo Island.
Alice Springs	ARR – \$110.20 Properties: 18	<ul style="list-style-type: none"> » Direct daily air services operate between Alice Springs and Sydney, Perth, Melbourne, Adelaide, Brisbane, Cairns, Darwin or Uluru (Ayers Rock). » Rail connections to Adelaide, Melbourne, Sydney and Queensland. 	<ul style="list-style-type: none"> » "Outback-capital" in central Australia and gateway to "the Red Centre": Uluru, Kata Tjuta, Kings Canyon. » Outback adventure activities: camel riding, quad biking and hot air ballooning, cattle stations, aboriginal storytelling. Indigenous culture.

	Average Room Rate (ARR) and Accommodation Capacity*	Transport	Destination Appeal promoted to Business Events Clients
Brisbane	<p>ARR – \$159.36</p> <p>Properties: 191</p> <p>Rooms: 12,664</p> <p>Five Star: 8</p> <p>Four Star: 78</p> <p>Three Star: 90</p> <p>Below Three Star: 9</p> <p>Ungraded: 6</p>	<ul style="list-style-type: none"> » Brisbane Airport offers passengers direct connections to 26 international and 35 domestic destinations operated by 30 airlines. Approximately 3,250 international and domestic flights each week. » Brisbane is easily connected to Sunshine Coast (north) and Gold Coast (south) via highways. » City Train operates throughout Brisbane (and on to Gold Coast) with the two main city stations being located at Sofitel Brisbane Hotel and the Holiday Inn Brisbane. » Buses service nearly every suburb in Brisbane and the free Loop Bus runs every 10 minutes on two routes in the CBD. » Ferries operate throughout the river system. 	<ul style="list-style-type: none"> » Compact vibrant city centre with easy access and close proximity between meeting venues, accommodation, shopping and dining. Located in the cultural riverside South Bank precinct. » Close proximity to Gold and Sunshine Coasts. » Subtropical weather year round.
Cairns	<p>ARR – \$140.32</p> <p>Properties: 145</p> <p>Rooms: 10,205</p>	<ul style="list-style-type: none"> » Domestic airport terminal undergoing \$200m renovation. Seven international and five domestic airlines operate out of Cairns International Airport. » Bus shuttle services regularly pick up and set down at most hotels. Many hotels and motels offer private transfer buses. Public bus transport operates to all Cairns city areas, suburbs and beaches. 	<ul style="list-style-type: none"> » Surrounded by world heritage attractions – Great Barrier Reef and tropical rainforest. » Variety of conference and incentive activities including rainforest and reef activities. » Tropical climate.

	Average Room Rate (ARR) and Accommodation Capacity*	Transport	Destination Appeal promoted to Business Events Clients
Canberra	<p>ARR – \$163.35</p> <p>Properties: 56</p> <p>Rooms: 5,100</p> <p>Five Star: 3</p> <p>Four Star: 32</p> <p>Three Star: 17</p> <p>Below Three Star: 3</p> <p>Ungraded: 1</p> <p>*For more recent accommodation data refer to 'Canberra by Comparison' report, November 2011 Canberra Convention Bureau</p>	<ul style="list-style-type: none"> » Four airlines (2 major operators) operate from Canberra. Direct flights go to Adelaide, Albury, Brisbane, Gold Coast, Hobart Melbourne, Newcastle, Perth, Sydney and Townsville. There are a total of 878 flights to and from Canberra each week. » A new terminal and car parking are under construction, stage one is completed, stage two will be in 2012. » Several coach operators provide services to Canberra from all over Australia. » Countrylink operates a regular rail service connecting Canberra with Sydney and other NSW destinations. » There is a lack of public transport to/from the airport operating in Canberra, therefore visitors rely heavily on taxis which has a cost and time impact which has been noted in satisfaction reports. » The taxi service is inadequate for the market & results in low satisfaction levels which are weakening Canberra's competitive position. Another weakness is lack of bus charter services, especially for groups larger than 250 delegates and other groups who have not booked well in advance. 	<ul style="list-style-type: none"> » National Capital, the meeting place of a nation. » Designed landlocked city in attractive natural (bush) setting. » National attractions – cultural. » Home of Federal Government. » Home to many national offices of associations and policy organisations. » Home to many national embassies, national and international diplomatic representative organisations. » Globally recognised national research and learning institutes – RALIG. » 25% increase in number of flights to major destinations since February 2008, with new flights to and from Hobart, Townsville and Darwin. » Fairly new high-end accommodation inventory including Hotel Realm and Diamant Hotel. » Ideal location between main population centres of Sydney and Melbourne. » Gateway to the Australian Alps and proximity to NSW South Coast.
Darwin	<p>ARR – \$172.50</p> <p>Properties: 43</p> <p>Five Star: 2</p> <p>Four Star: 19</p> <p>Three Star: 12</p> <p>Below Three Star: 3</p> <p>Ungraded: 7</p>	<ul style="list-style-type: none"> » International airport with flights from Singapore, Bali, New Zealand and Europe and the recently introduced Kuala Lumpur flights which fly 4 times per week. » Direct daily air services operate between Darwin and Sydney, Perth, Melbourne, Adelaide, Brisbane, Cairns, Alice Springs or Ayers Rock. However these flights are often scheduled at inconvenient times (eg: late at night, early in morning). » Rail connections to Adelaide (The Ghan), Melbourne, Sydney and Queensland. 	<ul style="list-style-type: none"> » Tropical harbour city with associated harbour activities (eg: sailing, fishing) and "tropical expertise". Also energy development and mineral resources. » International airport and proximity to Indonesian destinations. » Indigenous culture and natural outback environment. Gateway to Kakadu for pre and post touring. » Anticipated short season due to climate extreme in wet season with humidity regularly over 70%. » Dry season is ideal for outdoor activities due to the warm dry weather during day and night.

	Average Room Rate (ARR) and Accommodation Capacity*	Transport	Destination Appeal promoted to Business Events Clients
Gold Coast	ARR – \$142.92 Properties: 147 Rooms: 12,753	<ul style="list-style-type: none"> » Over 45 domestic and international flights operate every day between Gold Coast and 14 destinations in Australia, New Zealand and Asia. » Direct flights to and from Townsville, Cairns and Tokyo are the most recent additions to the Gold Coast Airport flight schedule with increased number of flights to existing routes also announced. » Brisbane International and Domestic Airports are one hour from Gold Coast. » Public bus transport operates throughout the Gold Coast. 	<ul style="list-style-type: none"> » Main holiday destination with 70km of beach and rainforest hinterland. » Proximity to Brisbane International Airport. » Wide variety of accommodation, entertainment, restaurant and food & beverage venues. » Wide variety of coastal attractions and activities and theme parks. » 300 Annual sun days.
Melbourne	ARR – \$179.51 Properties: 296 Rooms: 24,470 Five Star: 18 Four Star: 145 Three Star: 114 Below Three Star: 13 Ungraded: 6	<ul style="list-style-type: none"> » There are approximately 23 international and 5 domestic airlines that operate at Melbourne Airport to a variety of international and domestic destinations. » There are approximately 25,200 international flights and 166,800 domestic flights annually to and from major international and domestic destinations. » A \$330m expansion project for Melbourne International Airport began in January 2008 and will consist of a series of projects to be completed in 2013. The project will increase terminal space and capabilities. » A comprehensive public transportation system includes trams, trains and buses. » Free intra-city tram. 	<ul style="list-style-type: none"> » Stylish multicultural sophisticated city with mix of European and Australian culture. » Leading edge facilities including a large, newly built, international-standard convention centre located within the city. » Comprehensive public transportation system. » Extensive accommodation facilities. » Rich arts, music and sports scene. » Extensive shopping facilities, culinary treats and cafe culture. » A market leader in the planning and management of some of the world's most high profile events.

	Average Room Rate (ARR) and Accommodation Capacity*	Transport	Destination Appeal promoted to Business Events Clients
Perth	ARR – \$172.65 Properties: 125 Rooms: 10,858 Five Star: 6 Four Star: 46 Three Star: 53 Below Three Star: 9 Ungraded: 11	<ul style="list-style-type: none"> » Regular daily flights connect Perth to a variety of destinations throughout Australia, Europe, Asia, Middle East, Africa, USA and New Zealand. » Suburban electric rail system operates within Perth and passenger trains operate to areas within WA and the eastern seaboard. » An inexpensive bus transport system operates plus a free CBD bus service. A ferry system links Perth with South Perth. 	<ul style="list-style-type: none"> » Moderate Mediterranean climate. » Wide variety of accommodation and food and beverage venues. » Vibrant business, academic and artistic community. » Energy and resources centre. » Variety of conference activities available based on the natural attractions including Swan River, ocean, forests and wildlife and food and wine. » Reducing 'carbon footprints'. WA was the first state to develop a sustainable strategy in 2003. » As the epicentre of Australia's growth for the past 10 years, WA has the passion for innovation and development that comes with a dynamic, forward-thinking location.
Sydney	ARR – \$173.61 Properties: 292 Rooms: 32,703 Five Star: 27 Four Star: 122 Three Star: 104 Below Three Star: 26 Ungraded: 13	<ul style="list-style-type: none"> » Australia's largest international and domestic airports. 40 international and 9 domestic and regional passenger airlines fly into Sydney International Airport. Sydney Airport handles more than 55,000 international flights per year and over 220,000 domestic and regional flights fly in and out of the airport annually. » Extensive, easy to use public transport system includes harbour ferries, monorail and city and suburban bus and rail networks. » Increased traffic congestion and road tolls. 	<ul style="list-style-type: none"> » Australia's biggest international and domestic airports. » Spectacular natural harbour. » Large variety of international and standard accommodation. » Global tourist icons as Sydney Harbour Bridge, Sydney Opera House, Sydney Harbour and other attractions and leisure activities. » Cosmopolitan culture, temperate climate. » Home to many Asia Pacific regional headquarters. » Excellent value, high quality food with outdoor emphasis. » The commercial and tourist hub of the Southern Pacific region.

*Rooms = Total Rooms Available (includes Hotels, Motels & Serviced Apartments with 15 or more rooms)

Appendix 1 – Press Release Adelaide Convention Centre

Adelaide Convention Centre Achieves \$1 Billion 14 Oct 2011

Adelaide Convention Centre Achieves \$1 Billion 14 Oct 2011

The ACC generated more than \$90 million in economic benefit to South Australia in the past financial year including a record \$30.2 million in income from event and other trading activities.

And it is estimated that following Stage two of the ACC expansion, the Centre will generate an additional \$76 million per annum and an additional 1,784 jobs on average per annum.

ACC Chief Executive Alec Gilbert said the Centre generated \$91.1 million in economic benefits for the State (\$16 million more than its target) through events in the past financial year.

"It's an outstanding result that we're incredibly proud of.

"We've attracted approximately 22,500 visitors to South Australia, who would not otherwise have visited, and generated more than 101,000 hotel bed nights."

Tourism Minister John Rau congratulated the ACC on its milestone and said this year's record-breaking performance highlighted the importance of the convention centre upgrade, due to begin this year.

"The enormous economic benefit brought to South Australia by the ACC underlines the potential that can be unlocked by the \$350 million upgrade," Mr Rau said.

Appendix 2 – PWC study on Sydney proposed development of convention facilities – See attachment

Reference resources

- » Convention Centres and Convention Bureaux websites:
 - » www.scec.com.au
 - » www.mcec.com.au
 - » www.bcec.com.au
 - » www.adelaidecc.com.au
 - » www.pcec.com.au

- » www.cairnsconvention.com.au
- » www.darwinconvention.com.au
- » www.gccec.com.au
- » www.nccc.com.au
- » www.aspcc.com.au
- » Australian Bureau of Statistics website: www.abs.gov.au
- » Association of Australian Convention Bureaux website: www.aacb.org.au
- » Canberra Convention Bureau internal intelligence
- » Meeting Planner Guides & Annual Reports
- » Personal e-mail correspondence CEO Canberra Convention Bureau with:
 - » Angela Collard, Executive Director Industry Development NT Government
 - » Bob O'Keeffe, General Manager Brisbane Convention and Exhibition Centre
 - » Ton van Amerongen, Chief Executive Sydney Convention and Exhibition Centre
 - » Dean M Lee, Chief Executive Officer Perth Convention and Exhibition Centre
 - » Alec Gilbert, Chief Executive Officer Adelaide Convention Centre
 - » Ross Steele, General Manager Cairns Convention Centre
- » Presentation on Melbourne in Canberra by Leigh Harry, Head of Tourism Victoria (previously MCEC)
- » Press Release NSW Government 18 December 2010 *Plan to expand Sydney's convention and exhibition facilities*

Notes:



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THINK
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