

**RESPECT:**

# Shaping Events for Success



---

# Contents

<b>Introduction</b> .....	<b>4</b>
<b>The evolving events landscape</b> .....	<b>6</b>
<b>Curated event experience</b> .....	<b>10</b>
<b>Socially impactful events</b> .....	<b>14</b>
<b>Sustainable means of gathering</b> .....	<b>20</b>
<b>Prioritising health and wellbeing</b> .....	<b>24</b>
<b>Promoting human connection</b> .....	<b>28</b>
<b>Seamless integration of technology</b> .....	<b>32</b>
<b>Methodology</b> .....	<b>36</b>

McCrindle was commissioned to undertake research and development of this report for ICC Sydney. ICC Sydney is a A\$1.5 billion development by the NSW Government and Darling Harbour Live, comprising Capella Capital, ASM Global, Lendlease, Hostplus, Aware Super and Spotless FM. The venue is operated by ASM Global to respect people, places and planet.

# Introduction

From conferences and exhibitions, through to banquets, meetings and seminars to entertainment concerts, both business events and entertainment events industries play an important role in gathering people together.

McCrindle was commissioned to undertake research and development of this report for ICC Sydney. ICC Sydney is a A\$1.5 billion development by the NSW Government and Darling Harbour Live, comprising Capella Capital, ASM Global, Lendlease, Hostplus, Aware Super and Spotless FM. The venue is operated by ASM Global. The study is the collation of quantitative data collected through an online survey. The survey was in field from 30 October to 5 November 2023 and was completed by 1,001 Australians aged 18-77, representative of the population by age, gender and state/territory and was complemented with ICC Sydney's case studies and business events industry specific research.

## Events are back - where to from here?

### Business events

Though the COVID-19 pandemic impacted all industries and sectors, the business events industry was hit especially hard, being forced to shift online through live streams, online webinars and Zoom calls. Yet, across the world, we have seen the industry bounce back.

Tourism Australia report an increasing number of business events that have taken place globally. In June 2023, 90% of association decision makers reported having run events in the past 12 months, a significant increase from the 58% who reported the same in June 2022. We can expect to see even more events in the future, with 79% of the same decision makers intending to plan an association event in Australia in the next two years.

Many Australians have recently attended an event, with more than two in five Australians having attended a business event in person locally (46%) or online (43%) in the 12 months prior to November 2023.

### Entertainment events

An even greater proportion of Australians have attended a local entertainment event in person over the same time period (69%).

This is reflected in ICC Sydney's entertainment concert business results having its best performing year to date in 2023. While this is largely due to the pent up demand of postponed touring shows, it also reflects the desire for Sydneysiders to reconnect in person. It was one of the key market segments that has continued to revitalise the city with 360,000 people attending 85 event performances at ICC Sydney Theatre (8,000 seat) and ICC Sydney's Darling Harbour Theatre (2,500 seat) last year. The positive impact these events have for the performing arts sector was also significant as ICC Sydney re-established its role in contributing to the State's cultural capital.

## The trends shaping the evolving event landscape

As Australians return to in-person events, they are returning with fresh expectations. Movements in society, culture and technology are shaping their outlook and sentiment.

Attendees are seeking to engage with events in new and more immersive ways that prioritise human connection and value social impacts.

**This report outlines six trends that are shaping the evolution of business events in Australia and beyond:**



**1**  
Curated event experiences



**2**  
Socially impactful events



**3**  
A sustainable means of gathering



**4**  
Prioritising health & wellbeing



**5**  
Promoting human connection



**6**  
Seamless integration of technology

The evolution of the event landscape is inspiring, and as this report will explore, the industry has an opportunity to consider how

to do what it has always done well – gathering people for meaningful connection – in a way that adapts to these changing times.

# The evolving events landscape

## Australians eagerly attend events

Almost half of Australians surveyed attended in-person local business events (46%), although online business events still have a place, with a similar proportion of Australians (43%) who have attended one of these events in the past 12 months.

Over one in four Australians (27%) attended a business event interstate, while 18% attended one internationally last year.

Australians are engaging with a range of events, particularly for entertainment, where seven in ten (69%) have attended a local in-person entertainment event in the past year. One in three (34%) have attended an entertainment event interstate in the past 12 months, while 23% have attended one internationally. Online entertainment events are still relevant, with one in three (33%) having attended an online entertainment event in the past 12 months.



## When did you last attend an event?

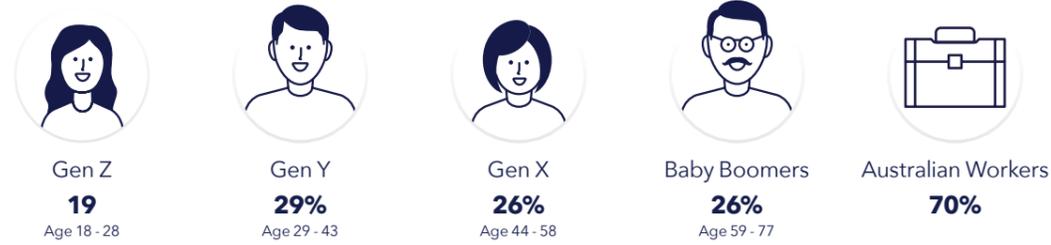
### Business events

		In the last 12 months	1-2 years ago	3-5 years ago	5+ years ago
In-person	Local	46%	7%	6%	16%
	Interstate	27%	7%	6%	14%
	International	18%	5%	4%	7%
	Online	43%	8%	3%	4%

### Entertainment events

		In the last 12 months	1-2 years ago	3-5 years ago	5+ years ago
In-person	Local	69%	9%	5%	7%
	Interstate	34%	10%	8%	12%
	International	23%	6%	6%	12%
	Online	33%	7%	2%	2%

# Gen Z is the most likely to have attended events within the last year



## Business events

In-person	Local	<b>71%</b>	<b>63%</b>	<b>42%</b>	<b>15%</b>	<b>61%</b>
	Interstate*	<b>42%</b>	<b>42%</b>	<b>22%</b>	<b>3%</b>	<b>36%</b>
	International*	<b>36%</b>	<b>27%</b>	<b>13%</b>	<b>0.4%</b>	<b>25%</b>

## Entertainment events

In-person	Local	<b>78%</b>	<b>79%</b>	<b>67%</b>	<b>53%</b>	<b>76%</b>
	Interstate	<b>53%</b>	<b>44%</b>	<b>33%</b>	<b>10%</b>	<b>42%</b>
	International	<b>44%</b>	<b>29%</b>	<b>18%</b>	<b>4%</b>	<b>29%</b>

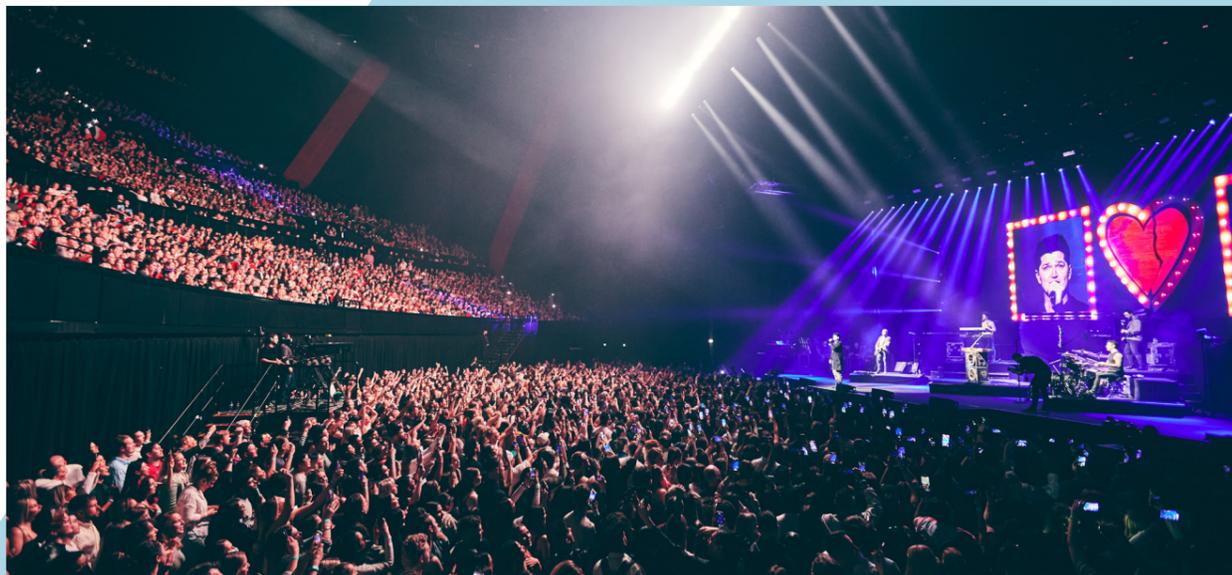
\* The Gen Z cohort is made up of those aged 18 to 28 and represents a wide range of individuals. While a proportion of this generation may still be studying, many have already completed undergraduate and postgraduate degrees, while others are already well-established into their careers.

Gen Z workers are at a stage where they are passionate about learning and developing their careers, making them likely to engage with business events that facilitate networking and professional development. Similarly, they are also in a life stage where travel interstate and internationally is more feasible than older generations.

# Curated event experiences

The shifting creative, technological and cultural landscape continues to shape the expectations people have of events. Stock-standard and industrial events no longer suffice, as attendees become increasingly sophisticated and seek meaningful experiences carefully crafted in such a way that are inclusive and informative. Immersive event experiences are in demand and are unmatched by any other channel, such as the Good Food & Wine Show, SXSW Sydney, or the inclusion of First Nations cultural ceremonies and content, such as the International Council of Monuments and Sites 21<sup>st</sup> General Assembly and Scientific Symposium featuring its Indigenous Heritage Program held at ICC Sydney.

This is consistent with societal changes more broadly. Over the last decade, we have seen the consumer landscape shift from mass market to customisation. Today's consumers, including event attendees, are increasingly prioritising products, services and experiences that have a frictionless engagement experience and the ability to be customised to their specific needs. In order for organisations to deliver a personalised customer experience, they must understand their consumers and communicate their message in a way that resonates with them.



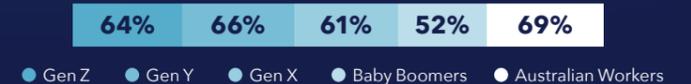
## Attendees value having curated content



Having content tailored to the audience is extremely/very important to **66%** of Australians



Gen Y (**66%**) is most likely to value events where they learn something new  
*(Extremely/very important to event experience)*



## Insights into the future attendee

### Gen Z values novelty and customisation in their event experience

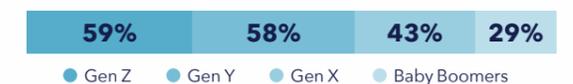
*Extremely/very important to event experience*



Experiencing something new for the first time



Being able to customise your own schedule and event experience



# CONNECTION TO FIRST NATIONS CULTURE AND COUNTRY



Credit: Maja Baska

Through its Reconciliation Action Plan commitments and event Legacy Program, ICC Sydney provides opportunities for event organisers and delegates to connect with Indigenous people and businesses.

Through its Legacy Program, ICC Sydney encourages organisers to activate authentic, cultural experiences at their events. Recognise and celebrate the culture and customs of the First Australians through:

- Cultural acknowledgments including Welcome to Country
- Indigenous food and produce selections that are championed in ICC Sydney's Menu Collection
- Performance and art experiences to inspire attendees embedded into the event program
- Cultural experiences and tours to educate and connect delegates with the community and Country
- ICC Sydney's partnership with Supply Nation to engage First Nations businesses to supply event needs.

- ✓ 90% Legacy Program activations at international events connect delegates to Australia's First Nations culture
- ✓ Over A\$595,727 spent with 20 First Nations suppliers over seven years
- ✓ National Reconciliation Week and NAIDOC Week acknowledged
- ✓ Indigenous ingredients infused through ICC Sydney's Menu Collection
- ✓ Connection to Boomalli Aboriginal Artists Co-operative that works to deliver specialised projects, including Reconciliation Action Plans, graphic design, public art, artist workshops, talks, artwork commissions, marketing campaigns and artwork licensing
- ✓ 'Bujari Gamarruwa' (Gadigal greeting) embedded into ICC Sydney's communications and customer service
- ✓ Yarning Circles delivered in partnership with community partner KARI.

"ICC Sydney's commitment to reconciliation with Australia's First Nations People was an important factor for us when choosing a venue partner. We've been pleased to welcome people to ICC Sydney from around 100 countries to this global gathering of the International Council on Monuments and Sites (ICOMOS) congress that focused on the rights, roles and responsibilities of Indigenous and First Nations custodians of cultural heritage. We have been really delighted to receive a formal Welcome to Country from the representatives of the Metropolitan Local Aboriginal Land Council. The GA2023 Gala Dinner showcased our Indigenous heritage, through performance by the Jannawi dancers and through the high-class menu, ICC Sydney featured Indigenous ingredients in every item, in every course."

*Prof. Richard Mackay AM - GA2023 Convenor*

"The power of business events to demonstrate the role of Aboriginal and Torres Strait Islander people is proven repeatedly at ICC Sydney. The business connections we have made have resulted in increased investment in our support programs, from helping to equip kids for learning to strengthening career opportunities for high performing talent, while broadening the exposure of our cultural performances to more local and visiting event attendees. With over 90% of our KARI performances booked and hosted through the venue, ICC Sydney has been a central platform to promote, share and nurture First Nations Peoples, culture and talent on a global scale."

*Cain Slater, Chief Commercial Officer at KARI*

# Socially impactful events

Australians are no longer content with simply attending an event but seek to contribute further through their attendance, ultimately becoming virtuous delegates, patrons and attendees. For Australians, their event engagement is filtered through the lens of environmental impact, sustainability and social contribution, as they seek to add value to their community through their attendance.

According to a survey of European-based event organisers commissioned by ICC Sydney, Diversity and Inclusion is a key factor for event professionals, with 76% of respondents rating it as very important or important, while 80% believe Diversity and Inclusion should either play an integral or important role in the planning and execution of events. However, the industry could do better. Less than half (42%) are satisfied with the industry's current efforts in promoting Diversity and Inclusion.<sup>2</sup>



Credit: Daniel Boud

## Events designed for inclusion and engaging local communities contribute to social impact

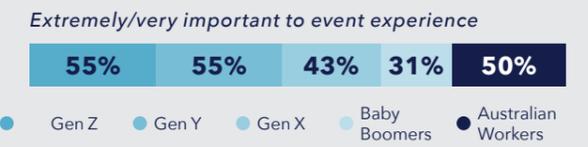
Factors that contribute to a socially impactful event (% total that agree)



### Attendees value events that are accessible and inclusive



### Opportunities to support human flourishing are valued



# Top factors that contribute to a socially impactful event

## Gen Z



Involving local communities in the event

50%



Providing transparency around practices and processes

49%



Supporting local businesses or organisations

42%

## Gen Y



Supporting local businesses or organisations

55%



Being inclusive of those with a disability or additional needs

51%



Involving local communities in the event

48%

## Gen X



Supporting local businesses or organisations

58%



Involving local communities in the event

54%



Being inclusive of those with a disability or additional needs

54%

## Baby Boomers



Supporting local businesses or organisations

70%



Being inclusive of those with a disability or additional needs

59%

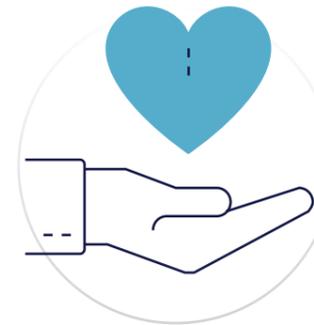


Involving local communities in the event

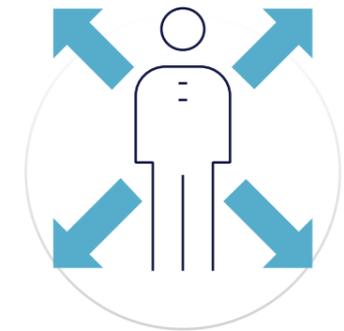
53%

# Insights into the future attendee

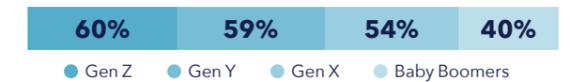
Gen Z is seeking to practically contribute to the events they are a part of



Gen Z is twice as likely as Baby Boomers to have volunteered at an event



Younger attendees are more likely to see value in opportunities to contribute at an event



# CREATING INCLUSIVE AND ACCESSIBLE EVENTS



Reflecting the intentions of the United Nations Sustainable Development Goals, which were developed to 'leave no one behind', ICC Sydney's aspiration to create the most inclusive environment for events means that every visitor feels welcome and can experience a sense of belonging. Its diverse and experienced team undertakes specialised training to guide organisers to create events that are inclusive, sustainable and accessible, as supported by its 'Inclusion and Belonging' Legacy Program stream.

## Embracing cultural diversity

Collectively, the ICC Sydney team speaks 82 different languages, ranging from Arabic to Yoruba and many in between.

ICC Sydney's Legacy Program provides opportunities to connect with neighbouring Chinatown, the Chinese Gardens of Friendship and organisations through Haymarket Chamber of Commerce that introduce delegates to a dynamic part of Sydney on ICC Sydney's doorstep.

ICC Sydney commissioned public work funded by Investment NSW, developed by Bilbie XR Labs and in collaboration with the Metropolitan Local Aboriginal Land Council - Gadigal Dreaming - a 3D experience of scenes of First Nations life pre-colonisation.

## LGBTQIA+ Pride in Diversity

Driven by ICC Sydney's internal LGBTQIA+ diversity focus group, The Same Same Collective, and underpinned by its Diversity, Equity and Inclusion Strategy, ICC Sydney was the first convention centre to be awarded Bronze Tier status in Pride in Diversity's Australian Workplace Equality Index.

## Accessibility and inclusion

With 1.3 billion people worldwide experiencing disability today<sup>2</sup>, and almost one in six Australians (18%)<sup>3</sup>, ICC Sydney is committed to driving accessibility and developed an Accessible and Inclusive Events Guide and other resources for event organisers to complement its accessibility information for visitors.

## Snapshot of accessible and inclusive events at ICC Sydney

- Sydney WorldPride Human Rights Conference
- Premier's Gala Concerts for Seniors
- Elevate the Stage
- Sydney Disability Connection Expo
- Source Kids Disability Expo

“ICC Sydney were great collaborative partners from the very beginning of this event and were incredibly aligned in the values we were trying to achieve. Whether it be accessibility, diversity or inclusion, the team shared our dedication in ensuring our delegates felt safe, accepted, and welcomed in the venue.”

*Kate Wickett, CEO, Sydney WorldPride*

“The support from the whole team at ICC Sydney has been exemplary. From event management services to logistics and exhibitor services, the venue team has been a real contributor in the successful planning of the most accessible and inclusive Sydney Disability Connection Expo. With ICC Sydney's support, we provided an unparalleled platform for visitors to engage with disability service providers at this exceptional event.”

*River Night, Founder, Sydney Disability Connection Expo*

# Sustainable means of gathering

As sustainability becomes more ingrained into the public narrative, it is also a growing focus for consumers and event attendees. Increasingly, individuals align themselves with organisations that are socially responsible, and have expectations for events to incorporate sustainability in an authentic way, without 'green washing'.

According to Conference and Incentive Travel survey results, sustainability is a key factor for event professionals, with 80% of respondents rating it as either very important or important.<sup>2</sup>

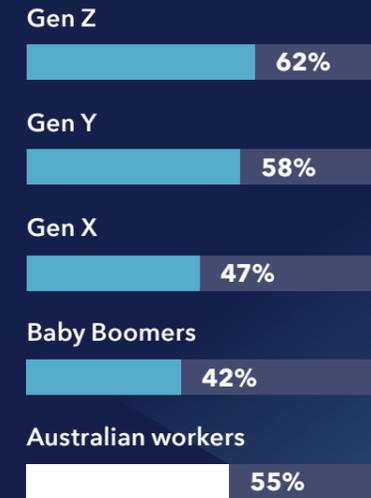
A venue's commitment to sustainability is a key consideration, with more than half (53%) rating it as either extremely influential or very influential for organisers when selecting a venue.<sup>2</sup>



Credit: Aaron Leslie



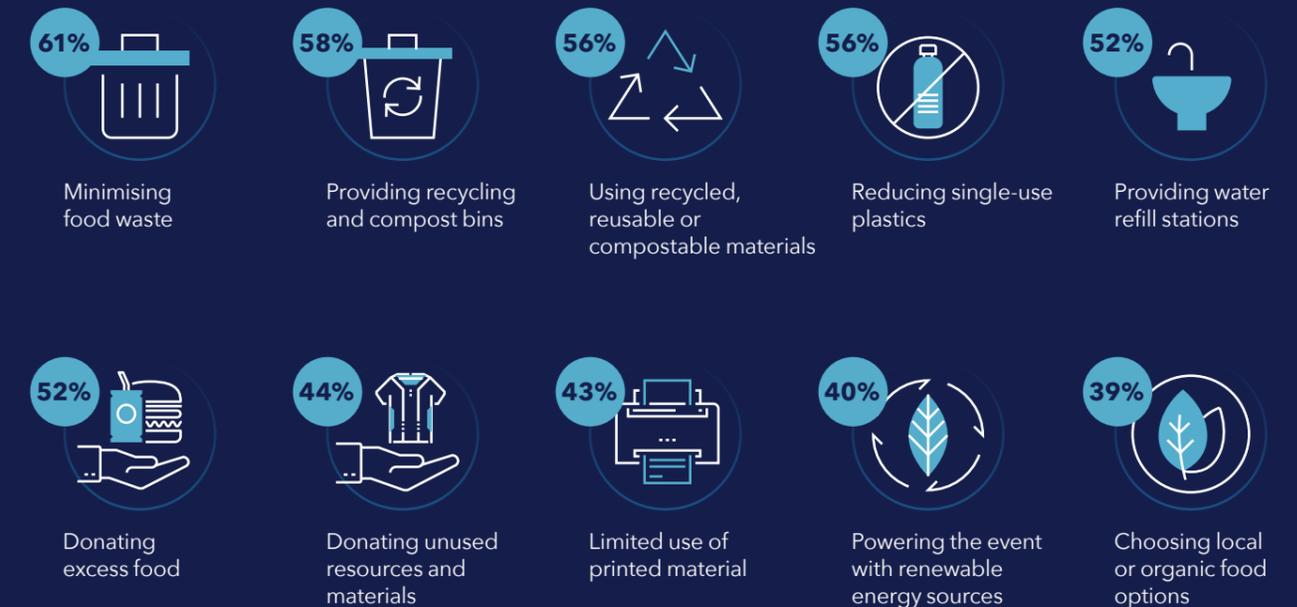
Half of Australians (52%) consider sustainable and environmentally friendly practices to be extremely/very important at an event



Globally, 50% of event planners are asked to select venues and accommodations that meet sustainability goals, while 65% of attendees are willing to pay more to fund environmental and sustainable programs.<sup>5</sup>

## A strategy maximising the circular economy is essential to an event's sustainability

Top ten factors that contribute to an environmentally friendly and sustainable event (% total that agree)



# ENVIRONMENTALLY SUSTAINABLE EVENTS AT ICC SYDNEY

As a founding signatory to the Net Zero Carbon Events Pledge, ICC Sydney strives to limit environmental impact by committing to the sustainable use of resources and minimising the carbon footprint of events.



**"As a College we want to ensure that our actions show our commitment to caring about the environment, diversity, equity and inclusion. It was incredible to work with ICC Sydney knowing that these issues also matter to the venue and the team, and that the venue has robust facilities and resources that greatly support these initiatives so integral to the success of our meeting and our college."**

*Jan Sharrock, Executive Director, Fellowship Affairs, Australian and New Zealand College of Anaesthetists*

**"See Saw fruit is grown and nurtured using sustainable and organic viticulture, followed by minimal intervention winemaking, which results in beautifully balanced handcrafted wines. The main difference in organic practices is the way we look after the soil. What we realised is that what you get in the vineyard is what you get in the bottle, so we wanted to create the healthiest soils we could to give the most beautiful wine. We are delighted to have a venue partner in ICC Sydney that promotes our wine across its international platform."**

*Justin Jarrett, Owner and Winemaker, See Saw Wines*

## ICC Sydney environmental credentials and sustainable infrastructure

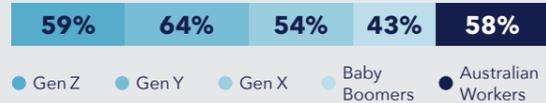
- ✓ Industry leading Legacy Program includes environmental sustainability resources to support energy, water and waste reduction and carbon analysis and post-event reporting
- ✓ Guides available include Sustainable Events Checklist and Plastic Free Events Guide
- ✓ Part of the first precinct in the world to achieve 6 Green Star rating
- ✓ Gold LEED building certified
- ✓ Environmental Standard ISO14001
- ✓ Silver EarthCheck accreditation (calculated by tenure)
- ✓ United with the Joint Meetings Industry Council as a signatory to its Net Zero Carbon Events initiative
- ✓ City of Sydney Sustainable Destinations Partnership member
- ✓ 2019 carbon footprint baseline supports further reductions along a roadmap to net zero
- ✓ Multiple sustainability awards
- ✓ Diverted 262 tonnes waste from landfill over seven years
- ✓ Integrated waste reporting platform to monitor event waste in real time
- ✓ 24.5 tonnes of goods donated to community partners through ICC Sydney's donation program
- ✓ Donated 34.6 tonnes of quality surplus food to charity partners in seven years
- ✓ Removed all problematic single use plastics ahead of NSW legislation
- ✓ Saved 2.65 million water bottles by partnering with Sydney Water to serve tap water, not bottled water at conferences
- ✓ ICC Sydney works with organisers to support installation of refill water stations for BYO bottles
- ✓ On site community funded solar array generates 5% energy and a further 20% renewable energy from 2024
- ✓ Energy reduction campaigns to achieve the goal of reducing energy use by a further 15% on the last year by 2025
- ✓ Menu Collection includes carbon friendly options and signature 100% local New South Wales wine list complements food sourced from over 80 local producers
- ✓ Organisers of banquets for over 200 guests can support Sydney Basin small growers and Sydney's people in need with edible centrepieces that are transformed by chefs into nutritious meals for Matthew Talbot Hostel
- ✓ Promoted local biodiversity through the re-introduction of endemic plants, including drought resistant plants which keep water usage down, attracting native wildlife back to the area.

# Prioritising health and wellbeing

Health and wellbeing are important priorities for all Australians. Event attendees are expecting event spaces that contribute to a welcoming and inviting environment. Key to this is providing an environment that caters to the seen and unseen needs of attendees, while also making events safe and enjoyable, where everyone has a chance to participate.



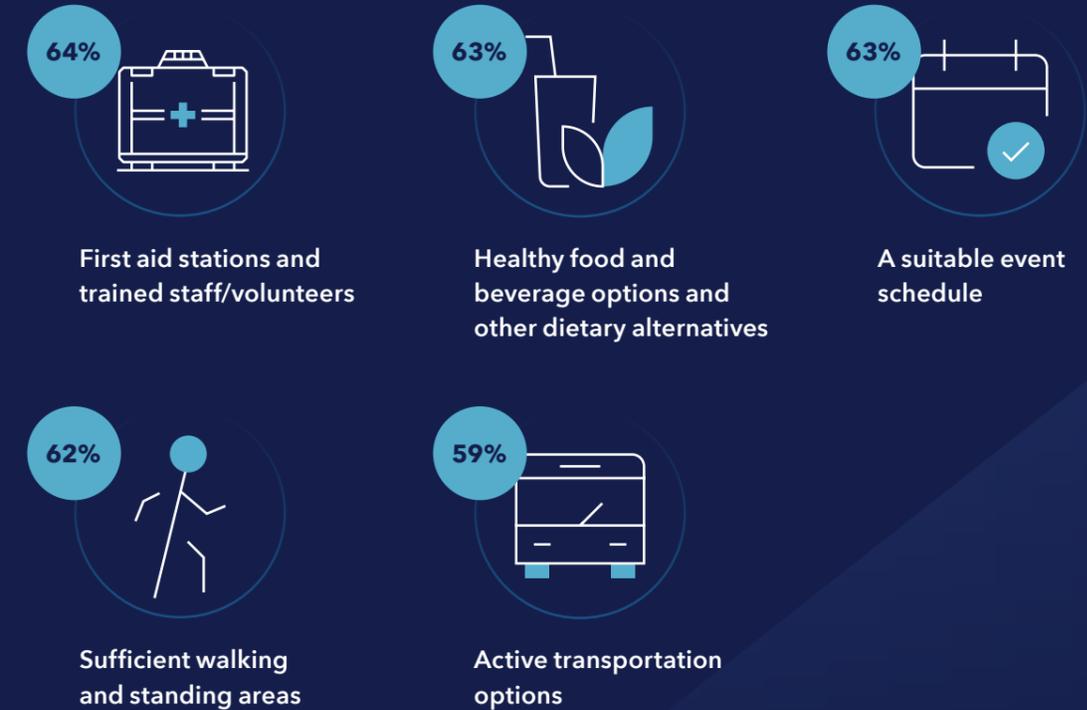
An event that prioritises health and wellbeing is extremely/very important to 55% of Australians, particularly for Gen Y



Credit: Tim Pascoe

## Top ways to promote health and wellbeing at an event

Extremely/very effective to event experience



## Event organisers can support health and wellbeing by considering the additional needs of attendees

Extremely/very effective to event experience



# NURTURING HEALTH AND WELLBEING AT EVENTS



## Inclusive spaces

ICC Sydney ensures that events and spaces are inclusive and accessible to everyone. Situated within a highly walkable city, the venue was designed to allow ample natural light and connection with the natural environment. Its spacious foyers, balconies and 5,000sqm Event Deck provide scenic views across Sydney and spaces for tai chi, yoga, traditional Yarning Circles or networking in the open air. In line with its Diversity, Equity and Inclusion Strategy, ICC Sydney has created sensory friendly spaces, first aid services, and its Menu Collection was designed with delegate health and wellbeing in mind.

## Best ingredients selected by provenance and quality

ICC Sydney is committed to fuelling attendee engagement while driving local economic impact through its Feeding Your Performance culinary philosophy that champions local New South Wales procurement as well as sustainably sourced local, seasonal and nutritious food for attendee health.

From freshly caught local seafood such as Murray cod, grey mackerel and oysters from the Hawkesbury, to kangaroo meat for a 'greener, cleaner' option, Pepe Saya butter produced from grass-fed cows and the fresh produce of Block 11 Organics - ICC Sydney's culinary team proudly offers event organisers and attendees a vast array of sustainably-sourced foods.

## Low and no alcohol options

ICC Sydney has seen an increased uptake of alcohol-free beverage options for attendees looking for a sophisticated drink as an aperitif or at any time of the day or evening.

## Yarning Circles for mental health and wellbeing

A Yarning Circle is a traditional place to talk, where storytelling can pass on cultural knowledge. ICC Sydney deepened its respect of First Nations culture through the launch of 'Yarning Circles' delivered by community partner KARI, which organisers can activate through the venue's Legacy Program.

"Malfroy's Gold and Natural Beekeeping Australia are pioneering, innovative small rural businesses delivering world-class products and services with a focus on bee, environmental and community health.

We provide our customers, including ICC Sydney and their guests, with Wild Honey, Wild Honeycomb and Beeswax - all ethically and sustainably produced in bee-friendly Warré hives. Our methods exceed both organic and biodynamic standards and we are the only professional natural comb beekeepers in Australia. Our Wild honey is proven to be chemical free with high medicinal activity, is unheated and rich in bee bread (pollen).

We are delighted ICC Sydney's support and long-term use of our award-winning produce within their network results in our ethical, sustainable and 100% natural bee produce being passed on to their customers and international visitors."

*Tim Malfroy, Owner, Malfroy's Gold Wild Honey, Honeycomb and Beeswax*

"With the support of ICC Sydney, we have access to a platform that has already brought us closer to our big goal. By hosting our Snow Ball at ICC Sydney, we have raised almost A\$6m over three years, which goes towards hundreds of cancer research and support programs across Australia, including buying robots for young cancer survivors and providing accommodation to families who have young cancer patients in metro hospital locations. ICC Sydney's continued focus on delivering positive social impact through events goes a long way in supporting Tour De Cure to improve the lives of people in our community living with and beyond cancer."

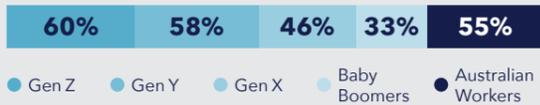
*Cassandra Prothero, Gala and Events Director, Tour de Cure*

# Promoting human connection

While technological advancement enables efficiency and convenience, at our core, we are relational beings and have a timeless need for physical connection. Attendees therefore value an event's ability to promote interaction. After a period of being forced to spend time apart, the role events play in facilitating face-to-face connection is more important than ever.



The ability to form new connections at an event is extremely/very important to 49% of Australians



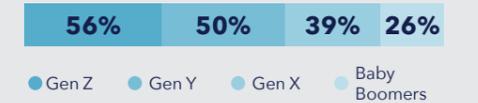
## Group activities remain the most effective way to promote connection at an event

Top ways to promote connection and collaboration at an event (extremely/very effective)



### Social media provides a way for Gen Z to connect

Extremely/very effective at promoting connection with others at an event



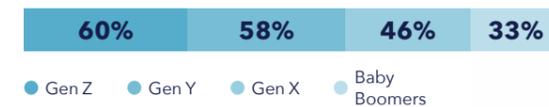
For Gen Z, social media is not merely a means for marketing, but a pathway for human connection. Especially for business events, as Gen Z navigates the earlier stages of their career, organisers may consider ways in which networking, conversations and interactions can be promoted.

## Insights into the future attendee

### Gen Z values forming new connections



Three in five Gen Z (60%) view opportunities to form new connections as extremely/very important



# CREATING ENTERTAINING AND SOCIALLY CONNECTIVE EXPERIENCES



“ICC Sydney is proud to deliver extraordinary events that foster collaboration and connection, energising the city as it welcomes thousands of attendees to the venue to share extraordinary experiences. Of the 500 core events delivered in 2023, it was a record-breaking year for consumer and entertainment events - reflective of the desire of Sydneysiders to connect in person.

The networking that takes place outside of the event sessions is equally, if not more important than what happens in the conference room. The connections that are made prior, during and post the event can be transformational and leave a lasting societal impacts. Through a design driven by ASM Global’s Functional Brief, ICC Sydney was purpose-designed to foster networking across its expansive foyers, balconies and meeting spaces. Increasingly, business event organisers prioritise extended networking breaks as critical opportunities within the program to support conversations, trade, knowledge exchange or career development.

Our human desire to connect in person was even more pronounced in 2023. Consumer exhibitions and national conferences performed strongly, experiencing some of their largest attendances since ICC Sydney opened and large international trade shows, such as the INDO PACIFIC International Maritime Exposition (which reported over 27,000 attendees in 2023, its largest ever), were extremely well attended. Consumer shows, though fewer in number than trade exhibitions, attracted over half the attendance, demonstrating the demand for bespoke, in person experiences.

ICC Sydney facilitates further creative connections, featuring emerging or established artists and performers through its Legacy Program, and by hosting events such as the Talent Development Project’s Graduation Concert, UTS Startups Summit and our own Advocates Club events.”

*Geoff Donaghy, Chief Executive Officer, ICC Sydney and Group Director - Convention Centres, ASM Global (APAC)*

“South by Southwest is one of the world’s largest culture festivals, made up of many different events and experiences, all together in one place for seven days. In choosing our anchor venue, ICC Sydney’s approach to sustainability and inclusivity fit within the brief of SXSW Sydney. Whether it be the Tech and Innovation Expo with more than 100 exhibitors to more than 400 conference sessions including celebrities, CEOs and thought leaders from around the world - from planning to execution, Year One for SXSW Sydney was a success. We’re looking forward to planning 2024 and beyond with ICC Sydney.”

*Colin Daniels, Managing Director, SXSW Sydney*

“ICC Sydney supported the concert with so much commitment it had a significant impact on TDP’s ability to showcase the remarkable artists who came into our orbit this year. ICC Sydney’s production serves our young people with the kind of opportunity that matches their skills and talent. The venue’s Legacy Program platform continues to nurture the careers of these emerging entertainers, connecting them to world class event experiences across a diverse range of clients and sustaining the meaning and the belief in the work that we do.”

*Peter Cousens, Artistic Director, Talent Development Project*

## Opportunities for human connection at ICC Sydney over seven years of operation



380 live entertainment events



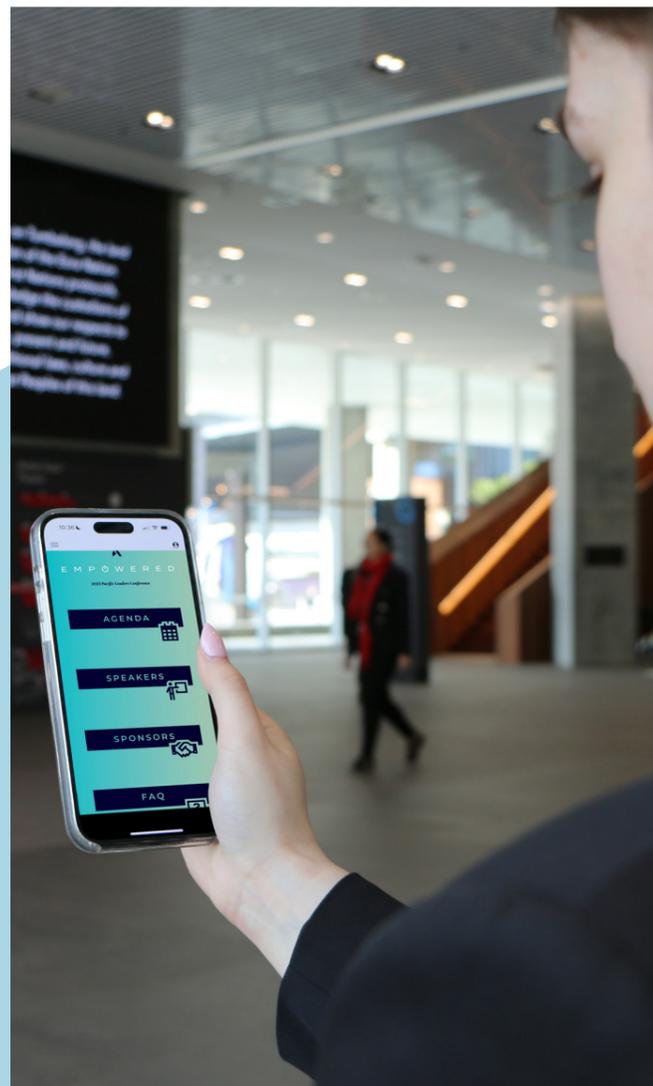
1.5 million people at performances held at ICC Sydney Theatre and Darling Harbour Theatre



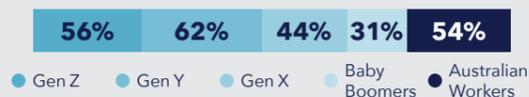
545,000 visitors at consumer exhibition since December 2016

# Seamless integration of technology

The future of events will see a seamless integration of technology. The events industry has often engaged technology through different means, from ticket sales and the sign in process, through to creating technologically immersive experiences. Many Australians, including younger attendees, have an appetite for further technological innovations in events. The future of the events industry could see a greater focus on virtual and augmented reality, utilising artificial intelligence or multi-location event opportunities.



**Gen Y is most likely to highly value a seamless integration of technology at events**



## An easy registration and sign in process is the most important use of technology at an event

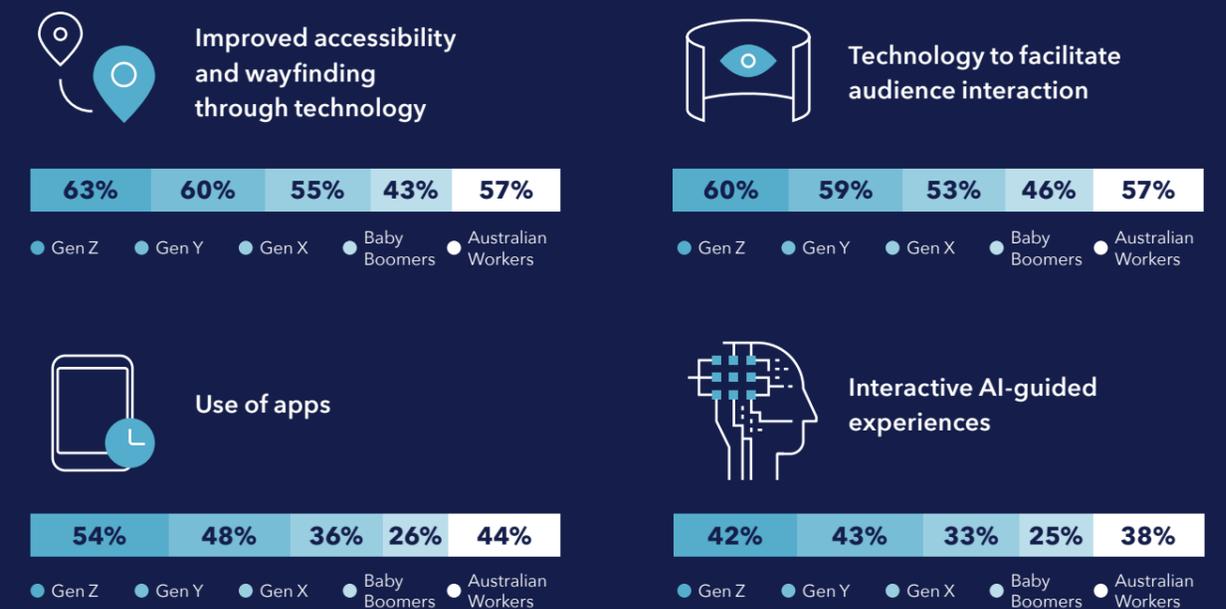
*Extremely or very important to event experience*



## Insights into the future attendee

**Gen Z and Gen Y place the highest importance on the use of technology in events**

*Extremely/very important to event experience*



# HUMAN CENTRIC TECHNOLOGY



ICC Sydney offers industry-leading technology to support end-to-end event solutions, responding to the ever-changing nature of events.

Connect Hub is ICC Sydney's one stop destination for digital event solutions, including a dedicated media studio for broadcast events, digital concierge for remote presenters, a video editing suite and digital signage management. The venue's customisable digital event platform – ICC Sydney Connect – streamlines online touchpoints, as managed by ICC Sydney's award-winning in-house Audio Visual Services team.

The next evolution of Connect is powered by ICC Sydney's customisable in-house event app solution, available for event organisers to optimise communication, engagement and networking functionality – all in one easy to navigate tool.

ICC Sydney's commitment to innovation extends to support it to achieve its corporate social responsibility goals. The venue has partnered with a digital enterprise to accelerate and improve data utilisation and its sustainability reporting.

Robots support line marking in the exhibition halls and ICC Sydney continues to seek out future, high tech enhancements to the visitor experience.

ICC Sydney is committed to sustaining Sydney's innovation pipeline, supporting the city's vibrant startup community and world class innovators and entrepreneurs. Working in partnership with Sydney Startup Hub and UTS Startups, government, academia and industry, ICC Sydney developed its Legacy Program where industry-specific startups are invited to pitch, present and showcase their ideas at relevant events.

- ✓ Award winning Connect Hub for digital event solutions
- ✓ ICC Sydney Connect web app supports events
- ✓ 18K hours digital signage support for community partners in 2023
- ✓ Investment in automation solutions to streamline event planning

- ✓ Robots to enhance visitor experiences and event management including robots for line marking in the exhibition halls
- ✓ Investment into faster internet and local network infrastructure including Wi-Fi 6 and 6e capable access points, Multigb capable network switches and 20Gb of internet connectivity - available for all visitors to the venue
- ✓ Development of immersive audio visual elements including innovative artwork creation, digital mapping and projection.

“The event organisation by the ICC Sydney team was impressive, every detail was well planned and flawlessly executed. Attendees at our EmPOWERED conference found the app invaluable to supporting their conference experience. Thank you to the ICC Sydney team who delivered a high standard of event.”

*Sarah Derry, Chief Executive Officer, Accor Pacific*

“ICC Sydney is the perfect venue to drive this kind of large-scale impact. We're currently supporting 680+ startups through UTS Startups, with connections to the right mentors, investors, customers, talent and researchers. It's wonderful to have a world class venue nearby with a team that encourages relevant startups in to support a particular industry or technical skill through the incredible Legacy Program partnership.”

*Murray Hurps, Director of Entrepreneurship, University of Technology Sydney*

---

# Methodology

This study is the collation of quantitative data collected through an online survey. The survey was in field from 30 October to 5 November 2023 and was completed by 1,001 Australians aged 18-77, representative of the population by age, gender and state/territory. Data analysis and report publication completed in February 2024.

While every effort was made to interpret the results accurately, survey results are subject to the survey respondents' interpretation of the questions and definition of specific terminology.

## References

1. Tourism Australia, New research demonstrates strong comeback for Australia's business events industry, 28 September 2023
2. ICC Sydney commissioned Conference and Incentive Travel to survey 77 event organisers based in Europe and the United Kingdom in December 2023
3. World Health Organization, Disability, March 2023
4. Australian Institute of Health and Welfare, People with disability in Australia, July 2022
5. MMGY Global, Portrait of European Meeting & Convention Travel, August 2023

## Survey respondents

Survey respondents were comprised of 49% male, 51% female. The proportion of respondents based on age are: Gen Z 19%, Gen Y 29%, Gen X 26%, Baby Boomers 26%.

Respondents based on employment status are: Full time work 49%, part-time/casual 16%, self-employed/independent contractor 6%, home duties 5%, retired/aged pensioner 15%, disability pension 3%, unemployed 4%.

ICC Sydney is a A\$1.5 billion development by the NSW Government and Darling Harbour Live, comprising Capella Capital, ASM Global, Lendlease, Hostplus, Aware Super and Spotless FM. The venue is operated by ASM Global.

