



Exhibition and Event  
Association of Australia

exhibitions  
**WORK**

## The Exhibition and Event Industry Benchmark Study

### Australia and New Zealand



Produced by the Research Division of:  
Micromex Marketing Services  
[www.micromex.com.au](http://www.micromex.com.au)

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## Introduction

Welcome to the 2002 Exhibition and Event Association (EEAA) Industry Benchmarking Study.

In 2001 EEAA released the first comprehensive benchmarking study of exhibitions and events in Australia and this latest report once again provides an in-depth look at the industry.

Since the initial study in 2001, EEAA has established a presence in New Zealand and this report includes the outcome of the inaugural New Zealand exhibition and events industry survey.

In this report we have expanded on the range of information gathered in the 2001 study and where applicable, comparisons are made to previous Australian studies.

## Acknowledgement

A special thanks to Graeme Selby, Domenic Genua and Carrie Elton for their assistance, particularly in helping secure a representative sample size.

Appreciation is also extended to all individuals and organisations that contributed to this study.

## Methodology

A flexible approach to data capture was a necessity in this study due to significant time constraints placed on organisations during their peak periods.

As such the surveys were completed using a variety of techniques including self-completion via email and faxed questionnaires as well as telephone discussions.

The details on the respondents are included in the Appendix.

The questionnaire design was based on the 2001 study with amendments and additions made after consultation between Micromex and EEAA.

It should be noted that for this year's study a wider range of organisations was targeted to allow for a diverse range of opinions and to ensure that larger organisations were included. This may account for a variation in results in comparison to the previous studies.

To maximise the response rate Micromex utilized the following procedure:

Databases used:

- EEAA membership and non-membership databases
- Vamosi Diary
- Internet search
- Micromex databases

Distribution of questionnaires:

- EEAA Members
  - An email was sent to all EEAA members followed up by a telephone call(s).
- Non Members
  - All organisations were initially contacted by phone to establish the most appropriate contact. This was followed up by an email or faxed questionnaire .

Follow-up: A minimum of three contact calls was made to those organisations that failed to respond.

## Methodology (Cont'd)

The Easter Shows and field days were excluded from the sample.

### Confidence interval and weighting

The exact size of the Exhibition and Events industry that fall within the criteria of a minimum of 500 square meters is unknown.

Market estimates were based on the returns received from organisers, the Vermosi lists and other known exhibitions or events as well as discussions with professionals in the industry.

The statistical integrity of the data received, from which the means were calculated, is high. Based on a confidence level of 95% the confidence interval ranged from approximately +-4% for a market size of 260 to +-7% for a market size of 300.

It is important to note though that not all respondents answered all questions and therefore the above confidence intervals are for indicative purposes only.

The methodology adopted to calculate the totals was by initially calculating the means, excluding the outliers, from the responses received. These means were then applied to the total estimated market excluding the number of outliers. The outliers were then included to produce the final figures. This negated the skewing of data as a result of the very large exhibitions.

Where the number of responses was of a statistically significant value, a distinction has been made between Trade and Public. This separation could not be applied to the New Zealand data due to its market size.

In some instances where an Exhibition or Event was classified as both Trade and Public, to avoid duplication, the data was analysed from the perspective of the nature of the majority of visitors.

For statistical analysis Micromex uses SPSS.

## Foreword

EEAA is the definitive association for exhibition and industry professionals.

Originally formed in 1991 to represent organisations responsible for providing a successful exhibition industry in Australia and more recently, New Zealand.

As part of EEAA's professional development program the management committee agreed to undertake a benchmark study of the industry in 2001.

The committee had subsequently acknowledged the value of the study and therefore contracted Micromex to once again analyse the market for the year 2002.

## Executive Summary

### Australia

Micromex attempted to contact 104 Australian organisations representing 245 exhibitions or events.

We received a total of 141 responses from 42 organisers, of which 135 fell within the criteria of a minimum of 500 square meters. This is an increase of approximately 75% on the 2001 study.

Best estimates indicate that the number of exhibitions and events held in 2002 in Australia were between 260 and 300. In this report therefore, the estimates are based on a range of 260 to 300.

### New Zealand

Micromex attempted to contact 23 New Zealand organisations representing 77 exhibitions or events.

We received a total of 38 responses from 8 organisers, of which 35 fell within the criteria of a minimum of 500 square meters.

Best estimates indicate that the number of exhibitions and events held in 2002 in New Zealand were approximately 50 that fit the criteria of a minimum of 500 square meters.

### General

When examining the outcome of this study the reader will become aware of the apparent decline in the number of visitors and exhibitors compared to the 1998 Industry Study and the 2001 Exhibition Survey.

Based on information gathered during the course of conducting this survey, we are of the opinion that the number of Exhibitions and Events has in fact increased since the previous year's estimate.

However, the Exhibitions and Events have become smaller as organisers target niche markets, corporate shows and focussed events. In addition, the rural market is growing with major events, albeit smaller, being held in a large number of regional centres.

What appears to be happening is that the base of the triangle, except for a few exhibitions and events, is broadening.

Micromex is also of the opinion that the September 11 New York attack impacted significantly on the industry particularly those exhibitions and events held in the early part of 2002.

## Summary of findings

### Australia

#### Type of Exhibition

- Public 62%
- Trade 34%
- Both 4%

#### Months held

There were two peak periods during the year with March through June being the first period, peaking in May, and August through October, peaking in October.

#### Location of exhibition or event

The most prominent location was Sydney with 36%, followed by Melbourne with 23% and Brisbane with 11%.

#### Days open

Most exhibitions and events were open for either three or four days.

- Three days 48%
- Four days 25%

#### Frequency

- 79% of the Exhibitions or Events were held annually.

#### Seminars, conferences or congress

- On floor seminars 78%
- An attached conference 14%
- Congress 4%

#### Space occupied and space sold

The average and gross space sold and occupied was:

- Average gross space occupied 8,214 square meters
- Average net space sold 3,814 square meters
- Total gross space occupied 2.1 to 2.5 million square meters
- Total net space sold 1.0 to 1.2 million square meters

#### Shell scheme

- 55% of net space overall was sold as 'shell scheme'

#### Number of Exhibitors

On average there were 165 exhibitors at each exhibition or event.

## Summary of findings (Cont'd)

### Australia (Cont'd)

When projected over the whole industry we found the number of Exhibitors to be between 43,000 and 48,000.

#### International Exhibitors

Overall, International Exhibitors represented approximately 4% of all Exhibitors.

#### Space rate

The average published space rates were:

- Excluding the shell                      \$276 per square meter
- Including the shell                        \$325 per square meter

#### Number of visitors

##### Trade

The average number of visitors to a trade exhibition was 7,000.

This gives a total for trade of between 800,000 and 900,000 visitors.

##### Public

The average number of visitors to a public exhibition was 17,000.

This gives a total for public of between 2.6 million and 2.9 million.

- Industry wide, the total number of visitors was between 3.4 million and 3.8 million.

#### Entry price

- Average entry price:                      \$11.00

#### CAB audited

12% of the respondents' visitor numbers were audited.

#### Rating of issues when selecting exhibition venues

The most important issues for both Trade and Public Exhibitions were:

- Date availability
- Location

## Summary of findings

### New Zealand

#### Type of Exhibition

- Public 71%
- Trade 29%

#### Months held

Most exhibitions were held in May and June or August through to October.

#### Days open

Most exhibitions and events were open for either two or three days.

#### Public

- Two days 36%
- Three days 40%

#### Trade

- Three days 90%

#### Frequency

89% of the exhibitions or events were held annually.

#### Seminars

- 82% of the exhibitions included on floor seminars

#### Space occupied and space sold

Based on the number of exhibitions and events, the average and gross space sold and occupied was:

- Average gross space occupied 7,999 square meters
- Average net space sold 4,873 square meters
- Total gross space occupied 399,950 square meters
- Total net space sold 243,650 square meters

#### Shell scheme

- 97% of net space overall was sold as 'shell scheme'

#### Number of exhibitors

On average there were 204 exhibitors at each exhibition or event.

When projected over the whole industry, we found the number of exhibitors to be 10,200.

#### International Exhibitors

Overall, International Exhibitors represented approximately 3% of all Exhibitors.

## Summary of findings (Cont'd)

### New Zealand (Cont'd)

#### Space rate

The average published space rates were:

- Excluding the shell                      \$164 per square meter
- Including the shell                        \$171per square meter

#### Number of visitors

##### Trade

- The average number of visitors to a trade exhibition was 4,220 or a total of 63,300 visitors.

##### Public

- The average number of visitors to a public exhibition was 12,653 or a total of 442,855 visitors.

Note: When reviewing these figures it is important to note that there were exhibitions that attracted a considerable number of visitors. If these figures were included in the averages they would drastically skew the totals.

When we add these additional visitor numbers into the projected total number of visitors we get a total of 707,000.

#### Entry price

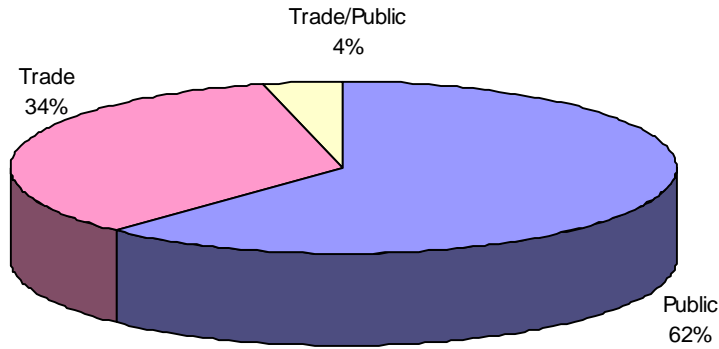
- Average entry price:                      \$11.00

## Detailed Analysis of Exhibitions and Events in Australia

### Part 1: Australia

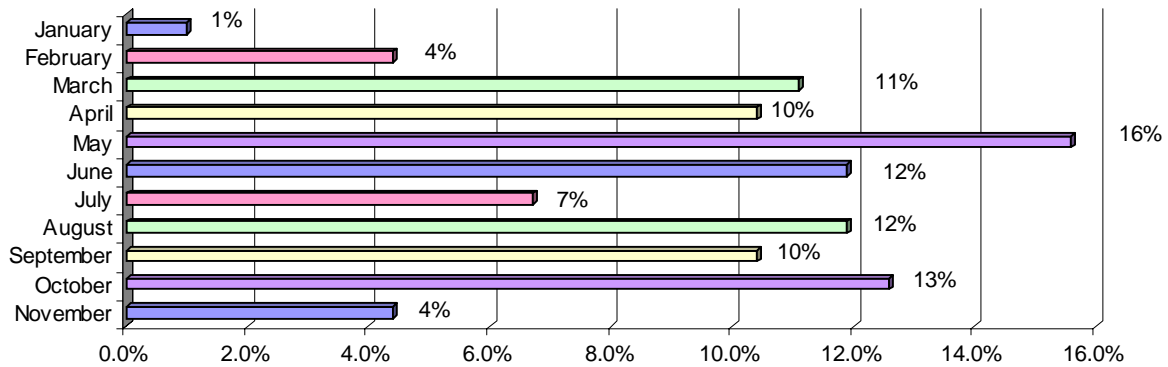
#### Section A: Organiser and Exhibition details

##### Type of Exhibition



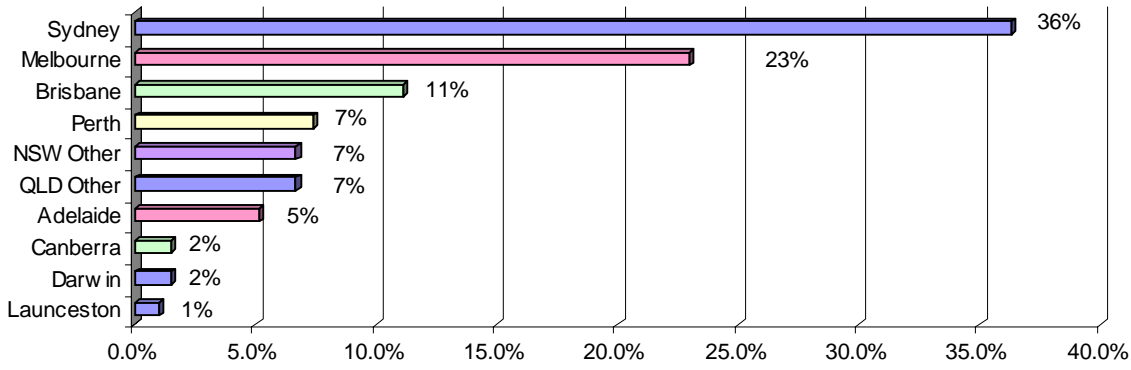
	Count	Col %	2001
Public	84	62%	40%
Trade	46	34%	52%
Trade/Public	5	4%	8%

##### Month in which the Exhibition was held



	Trade		Public		Overall	
	Count	Col %	Count	Col %	Count	Col %
January	1	2.2%	0	0.0%	1	1.0%
February	3	6.5%	3	3.4%	6	4.4%
March	6	13.0%	9	10.1%	15	11.1%
April	4	8.7%	10	11.2%	14	10.4%
May	7	15.2%	14	15.7%	21	15.6%
June	6	13.0%	10	11.2%	16	11.9%
July	1	2.2%	8	9.0%	9	6.7%
August	7	15.2%	9	10.1%	16	11.9%
September	9	19.6%	5	5.6%	14	10.4%
October	1	21.7%	16	18.0%	17	12.6%
November	1	2.2%	5	5.6%	6	4.4%

**City in which the Exhibition was held**



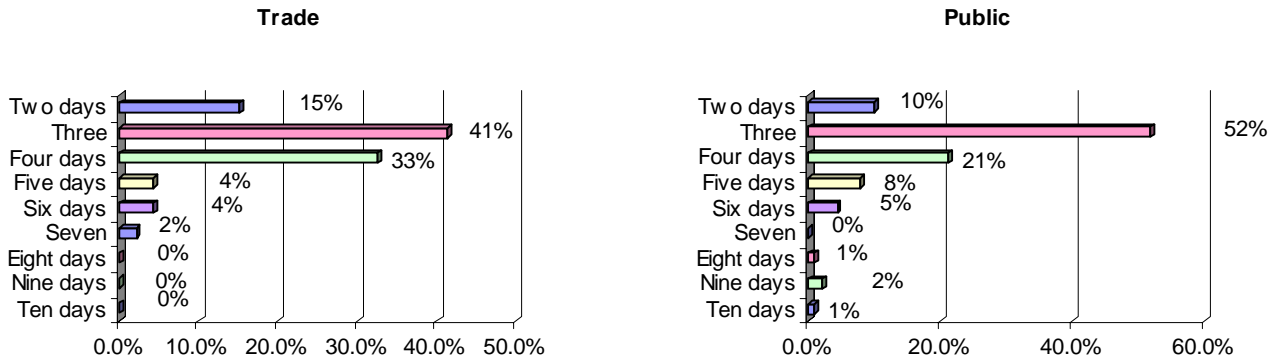
	Count	Col %
Sydney	49	36.3%
Melbourne	31	23.0%
Brisbane	15	11.1%
Perth	10	7.4%
NSW Other	9	6.7%
QLD Other	9	6.7%
Adelaide	7	5.2%
Canberra	2	1.5%
Darwin	2	1.5%
Launceston	1	1.0%

The majority of exhibitions were held in Sydney.

In the 2001 study the locations were given by State. Comparing the locations by State we found:

State	2002	2001
New South Wales	43%	49%
Victoria	23%	29%
Queensland	18%	13%
Other	16%	9%

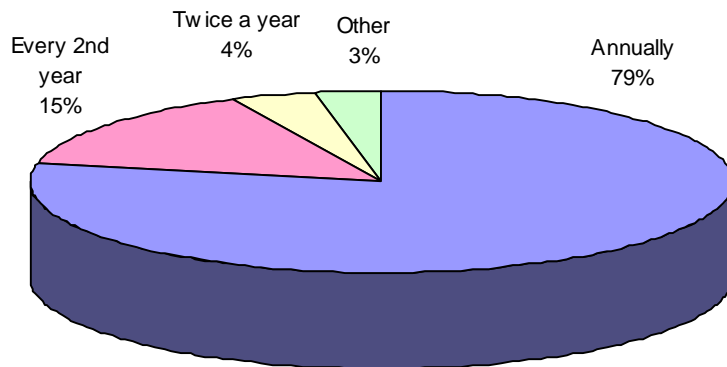
### Open days of the Exhibition



	Trade		Public		Total	
	Count	Col %	Count	Col %	Count	Col %
Two days	7	15.2%	9	10.1%	16	11.9%
Three days	19	41.3%	46	51.7%	65	48.1%
Four days	15	32.6%	19	21.3%	34	25.2%
Five days	2	4.3%	7	7.9%	9	6.7%
Six days	2	4.3%	4	4.5%	6	4.4%
Seven days	1	2.2%	0	0.0%	1	1.0%
Eight days	0	0.0%	1	1.1%	1	1.0%
Nine days	0	0.0%	2	2.2%	2	1.5%
Ten days	0	0.0%	1	1.1%	1	1.0%

The average number of days was predominantly in the range of three to four days. On average, the duration was four days, which was the same as in 2001.

### Frequency of the Exhibition



	Count	Col %	2001
Annually	107	79.2%	81%
Every 2nd year	20	14.8%	8%
Every 3 years	1	1.0%	
Every 4 years	1	1.0%	
Inaugural/Once off	1	1.0%	5%
Twice a year	5	3.7%	3%

## Section B

### Inclusion of floor seminar(s), attached conference or congress

Overall, the exhibitions or events included the following:

- On floor seminars 78%
- An attached conference 14%
- Congress 4%

### Net and gross space sold

The average net space sold and gross space occupied for trade and public shows, as well as overall, was estimated to be:

	Public	Trade	Total	Total estimates in 2001
Net space	4093	3536	3814	4701
Gross space	8187	8241	8214	11270

Based on the estimation that the number of exhibitions and events held in Australia in 2002 was between 260 and 300, we can project the total net space sold and gross space occupied to be in the range:

Public exhibition or event:

- Total net space sold: Between 607,000 and 700,000 square meters
- Total gross space occupied: Between 1,212,000 and 1,400,000 square meters

Trade exhibition or event:

- Total net space sold: Between 400,000 and 456,000 square meters
- Total gross space occupied: Between 923,000 and 1,063,000 square meters

Public and Trade combined to give a total figure:

- Total net space sold: Between 1,007,000 and 1,156,000 square meters
- Total gross space occupied: Between 2,135,000 and 2,463,000 square meters

Comparison with 2001 in square meters:

Note: Only totals were reported in 2001:

	2001	2002
Total net space sold	1.25 m	1.0 – 1.2 m
Total gross space occupied	3.0 m	2.1 – 2.5 m

### Percentage of net space sold as 'shell scheme'

55% of net space overall was sold as 'shell scheme'

The range of responses was from 0% to 100% with the median of 60%.

**Number of exhibitors**

In this study we found the average number of exhibitors to be:

	Public	Trade	Combined average	2001 average
Average	170	160	165	221

When we projected this out over the whole industry we found:

- Total number of exhibitors at public events: 25,000 to 27,000
- Total number of exhibitors at trade events: 18,000 to 21,000

Trade and public events combined:

- Total number of exhibitors: 43,000 to 48,000 (This compares to 59,000 in 2001)

**Note:** In the 1998 Industry Study the average number of exhibitors per public exhibition was 123 and per trade exhibition was 151.

**Percentage of international exhibitors**

Of the 122 responses to this question we found that on average 4% were overseas exhibitors. This compares to 8% in 2001.

**Published space rate excluding shell cost**

The average published space rate was: \$276

**Published space rate including shell cost**

The average published space rate including shell costs was: \$325

**Total number of visitors (000's)**

TRADE	Count (000's)	Col %	2001 Count	2001 Col %	1998 Industry Study
Same State visitors	624 - 712	78.4%			
Interstate visitors	146 - 163	17.9%			
Overseas visitors	27 - 31	3.4%			
<b>Total</b>	796 - 908				1,458
Average	7				
<b>PUBLIC</b>					
Same State visitors	2,565 – 2,856	97.2%			
Interstate visitors	56 - 63	2.1%			
Overseas visitors	17 - 20	<1%			
<b>Total</b>	2,638 – 2,938				3,582
Average	17				
<b>COMBINED PUBLIC/TRADE</b>					
Same State visitors	3,188 – 3,568	92.8%	2,496	64%	
Interstate visitors	202 - 226	5.8%	936	24%	
Overseas visitors	44 – 50	1.3%	468	12%	
<b>Total</b>	3,434 – 3,844		3,900		5,040
Average	13				

### Average entry price to public exhibitions

- Average entry price based on 87 responses was: \$11.00

### Number of exhibitions or events where visitors were CAB audited

	Yes		No	
	Count	Col %	Count	Col %
CAB audited	16	12.3%	114	87.7%

### Rating of issues when selecting exhibition venues

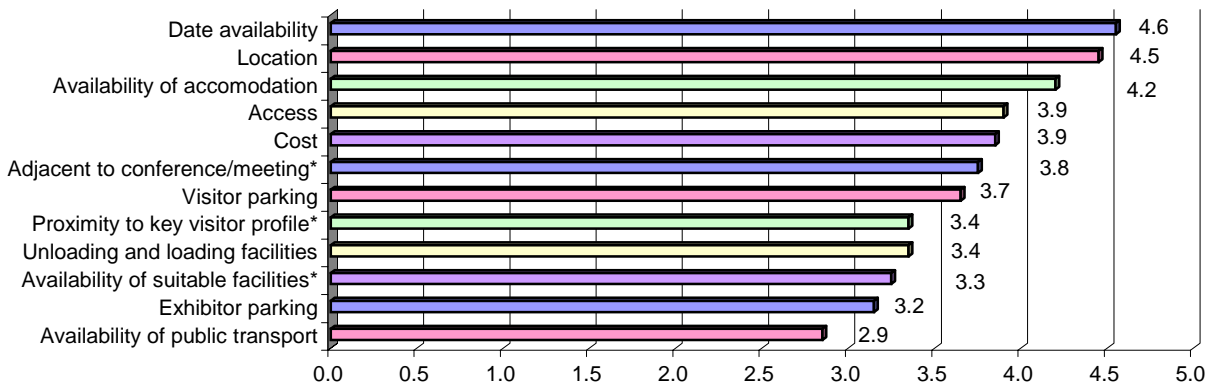
In this question we attempted to establish the importance of a number of factors to the organisers in their decision to hold an exhibition or event at a particular venue.

The ratings are on a scale of 1 to 5 where 5 is of high importance.

The data has been separated into Trade and Public as well as between Sydney and Melbourne to illustrate the differences in importance of some factors.

Due to the small number of responses, Adelaide, Perth and Brisbane are Trade and Public combined.

#### Trade

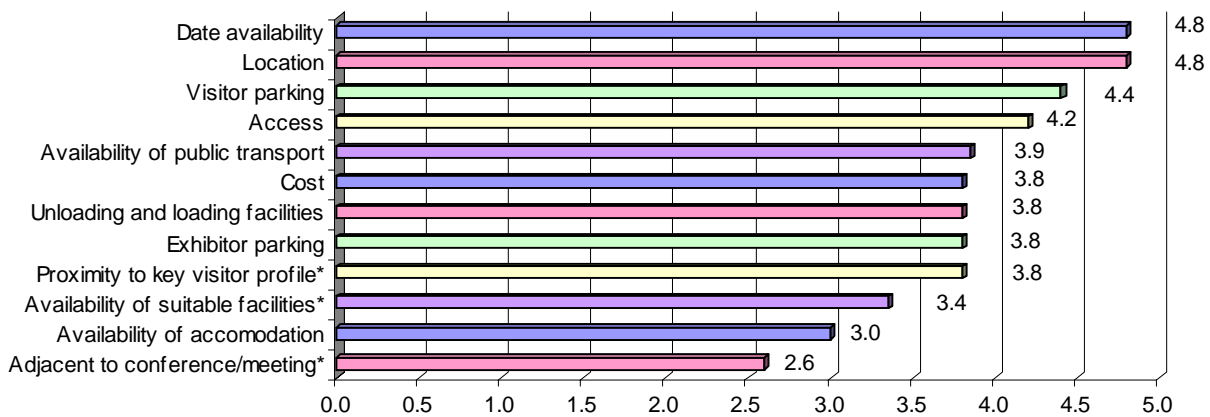


	Sydney Trade	Melbourne Trade	TOTAL
Date availability	4.7	4.4	4.6
Location	4.5	4.4	4.5
Availability of accommodation	4.2	4.2	4.2
Access	4.1	3.7	3.9
Cost	4.0	3.7	3.9
Adjacent to conference or meeting facilities	3.9	3.6	3.8
Visitor parking	3.5	3.8	3.7
Proximity to key demographic/core visitor profile	3.1	3.6	3.4
Unloading and loading facilities	3.4	3.3	3.4
Availability of suitable facilities such as amenities/restaurants	3.5	3.0	3.3
Exhibitor parking	3.3	3.0	3.2
Availability of public transport	2.8	2.9	2.9

*Continued on the following page*

**Rating of exhibition venues (Cont'd)**

**Public**



	Sydney Public	Melbourne Public	TOTAL
Date availability	4.7	4.9	4.8
Location	4.7	4.9	4.8
Visitor parking	4.4	4.4	4.4
Access	4.0	4.4	4.2
Availability of public transport	3.9	3.8	3.9
Cost	3.8	3.8	3.8
Unloading and loading facilities	3.7	3.9	3.8
Exhibitor parking	3.7	3.9	3.8
Proximity to key demographic/core visitor profile	3.8	3.8	3.8
Availability of suitable facilities such as amenities/restaurants	3.5	3.2	3.4
Availability of accommodation	3.1	2.9	3.0
Adjacent to conference or meeting facilities	2.6	2.6	2.6

**Trade and Public**

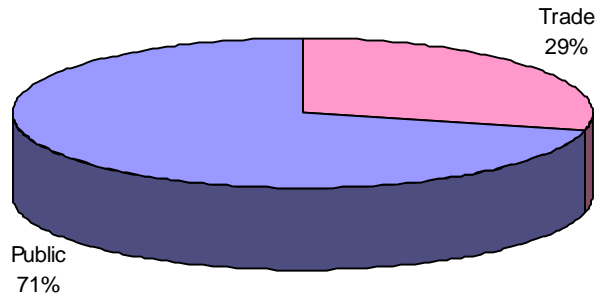
	Perth all	Brisbane all	Adelaide all	TOTAL
Date availability	4.1	4.6	4.0	4.8
Location	3.3	4.7	4.0	4.8
Visitor parking	3.6	4.3	3.7	4.4
Cost	3.4	4.3	4.0	4.2
Access	2.7	3.7	3.9	3.9
Unloading and loading facilities	2.6	4.0	3.4	3.8
Exhibitor parking	3.0	3.6	3.1	3.8
Availability of public transport	3.1	3.8	3.1	3.8
Proximity to key demographic/core visitor profile	2.9	3.9	2.4	3.8
Availability of suitable facilities such as amenities/restaurants	2.3	3.3	2.7	3.4
Availability of accommodation	1.8	2.8	3.1	3.0
Adjacent to conference or meeting facilities	1.7	2.3	2.1	2.6

**Detailed Analysis of Exhibitions and Events**

**Part 2: New Zealand**

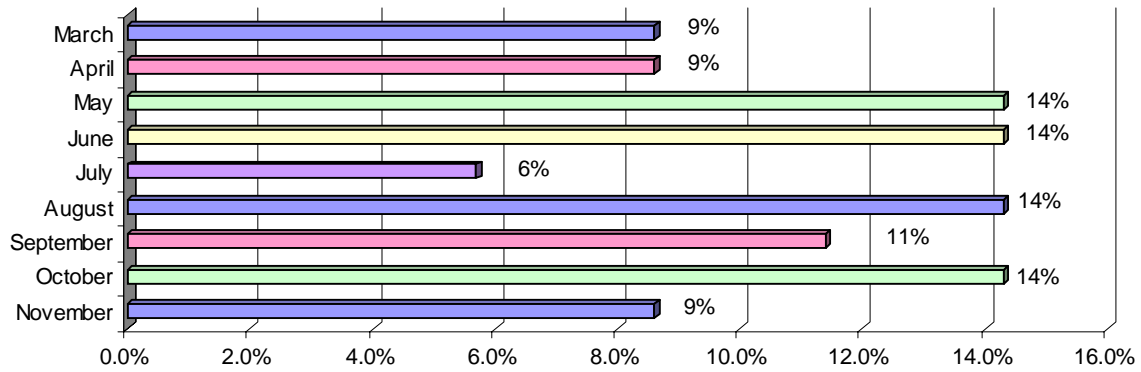
**Section A: Organiser and Exhibition details**

**Type of Exhibition**



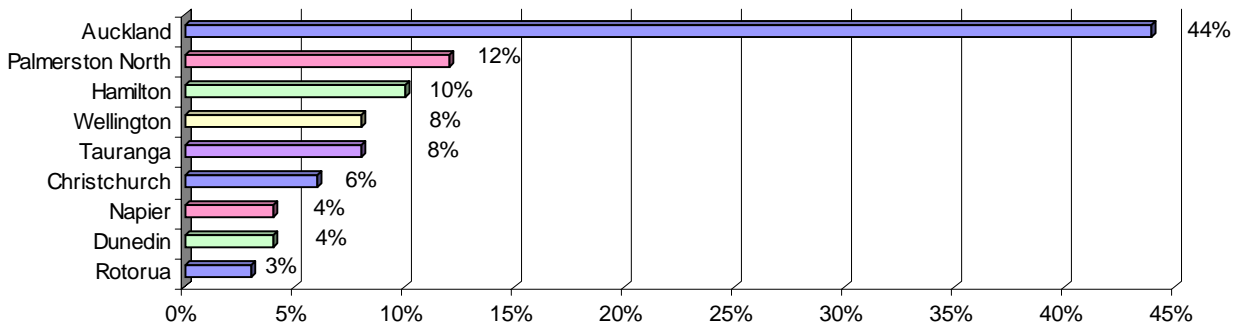
	Count	Col %
Trade	10	28.6%
Public	25	71.4%

**Month in which the Exhibition was held**



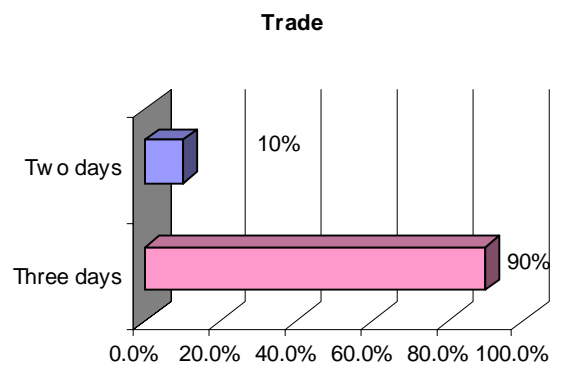
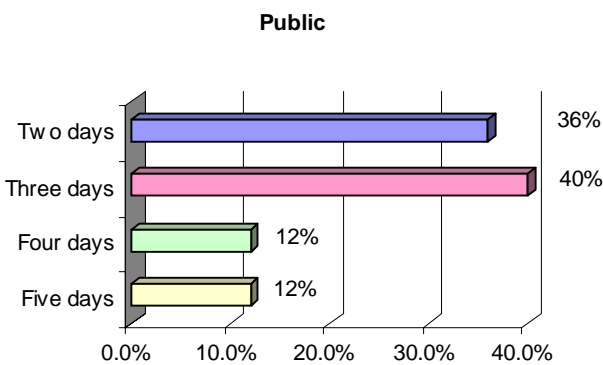
	Public		Trade		Total	
	Count	Col %	Count	Col %	Count	Col %
March	2	8.0%	1	10.0%	3	8.6%
April	2	8.0%	1	10.0%	3	8.6%
May	3	12.0%	2	20.0%	5	14.3%
June	4	16.0%	1	10.0%	5	14.3%
July	1	4.0%	1	10.0%	2	5.7%
August	4	16.0%	1	10.0%	5	14.3%
September	3	12.0%	1	10.0%	4	11.4%
October	3	12.0%	2	20.0%	5	14.3%
November	3	12.0%	0	0.0%	3	8.6%

### City in which the Exhibition was held



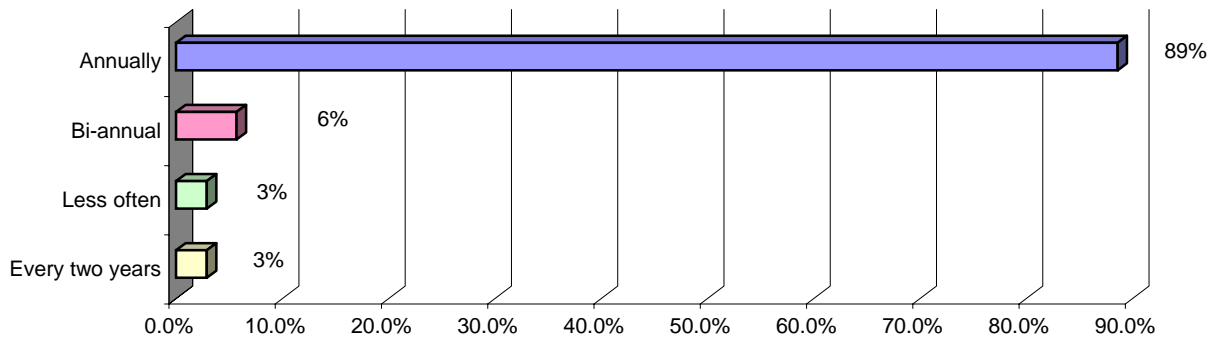
	Count	Col %
Auckland	22	44%
Palmerston North	6	12%
Hamilton	5	10%
Wellington	4	8%
Tauranga	4	8%
Christchurch	3	6%
Napier	2	4%
Dunedin	2	4%
Rotorua	2	3%
Total	50	100%

### Open days of the Exhibition



	Public		Trade		Overall	
	Count	Col %	Count	Col %	Count	Col %
Two days	9	36.0%	1	10.0%	10	28.6%
Three days	10	40.0%	9	90.0%	19	54.3%
Four days	3	12.0%	0	0.0%	3	8.6%
Five days	3	12.0%	0	0.0%	3	8.6%

### Frequency of the Exhibition



	Count	Col %
Annually	31	88.6%
Bi-annual	2	5.7%
Less often	1	2.9%
Every two years	1	2.9%

## Section B

### Inclusion of floor seminar(s), attached conference or congress

82% of the exhibitions included on floor seminars

### Net space sold

- Average net space sold                      4,873 square meters
- Total net space                                      243,650 square meters

### Gross space occupied

- Average gross space occupied              7,999
- Total gross space                                      399,950

### Percentage of net space sold as 'shell scheme'

- Average % net space sold as 'shell scheme'              97%

### Total number of exhibitors

- Average number of exhibitors                      204

When projected over the whole industry this represents approximately 10,200 exhibitors

### Percentage (if any) of international exhibitors

- Average % international visitors                      3%

**Published space rate excluding shell cost**

- Average published space rate excluding cost of shell \$164

**Published space rate including shell cost**

- Average published space rate including cost of shell \$171

**Average entry price to public exhibitions**

- Average entry price to public exhibitions \$11.00

**Total number of trade visitors**

- Average number of trade visitors 4,220

Based on 15 trade exhibitions per year this results in a total of 63,300.

**Total number of public visitors**

- Average number of public visitors 12,653

Based on 35 public exhibitions per year this results in a total of 442,855

Note: When reviewing these figures it is important to note that there were exhibitions held that attracted a considerable number of visitors. If these figures were included in the averages they would drastically skew the totals.

When these additional visitor numbers were added into the projected total we came up with a total of 707,000 visitors.

## Organisations that responded

### Australian Respondents

Aerospace Maritime & Defence Foundation of Aust  
 AGHA  
 ATC Events  
 Australian Dental Industry Association  
 Australian Direct Marketing Association  
 Australian Events  
 Australian Exhibition Services  
 Australian Exhibitions & Conferences Pty Ltd  
 Australian Fitness Network  
 Australian Veterinary Association  
 Automotive Exhibitors Association  
 Bannister Promotions  
 Berg, Bennett & Associates  
 Boating Industry Association  
 Caravan Trade & Industries Association of Qld  
 CMS Events  
 Conference Solutions  
 Consult Fleetwood Management Services  
 dmg world media  
 ETF  
 Events Unlimited International  
 Eventuate  
 Exhibition Marketing  
 Exhibitions Plus  
 Exhibit Exhibition  
 Expertise Events  
 HIA  
 Information on Disability Equipment Access Services Inc  
 James A Johnson & Associates  
 Juliusmedia  
 NSW Caravan & Camping Industry Association  
 NT Expo Pty Ltd  
 Organisers International  
 Pharmaceutical Education & Administration  
 PICA  
 Quitz Pty Ltd  
 Reed Exhibitions  
 Reed Travel  
 Rural Scene Promotions  
 Swan Exhibitions  
 Tour Hosts  
 Trade Fairs & Events

### New Zealand Respondents

Expertise Events  
 dmg world media  
 House & Home Exhibitions Limited  
 Mystery Creek Events Centre  
 North Port Events  
 Peacock Promotions Ltd  
 Pioneer Leisure Centre  
 Transport & Contracting Shows Ltd