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exhibitions
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The Exhibition and Event Industry Benchmark Study

Australia and New Zealand



Produced by Micromex Research
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EEAA

Exhibition and Event Study 2003/04

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Introduction

Welcome to the 2003/4 Exhibition and Event Association of Australasia (EEAA) Industry Benchmarking Study.

In 2003 EEAA released a 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 New Zealand exhibition and events industry survey.

In this study we have expanded the sourcing of information to include venues and registration companies. This has enabled us to cross correlate the data to provide more accurate statistics on the industry.

Acknowledgement

A special thanks to Fraser Bayne (Expohire), Mark Baker (Chief Executive Officer EEAA) and Donna White (North Point Events - New Zealand) 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 mail, email and faxed questionnaires as well as telephone discussions.

The details on the respondents are included in the Appendix.

Pre-qualification

The data included in this report is a summary of exhibitions and events where the net space was equal to or in excess of 500 m².

Field days and Easter Shows were excluded from the sample.

Methodology comparisons to previous studies

The questionnaire design was based on the 2001 and 2002 study with amendments made after consultation between Micromex and EEAA.

Methodology (Cont'd)

When comparing the outcomes of this study it is important to consider the following:

- This survey differed from the previous surveys in that the survey period was changed from January to December to July to June. This enabled more accurate data to be collected as the delay in the collection process was reduced from 9 months to 3 months.
- In previous studies the primary source of data was from exhibition organisers. In an attempt to improve on the quality of data the emphasis was placed in venues complemented by the responses from the organisers and registration companies.

Databases used:

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

Distribution of questionnaires:

In Australia a questionnaire was mailed to CEOs or senior managers, including a personalised letter on an EEAA letterhead from Mark Baker, Chief Executive Officer EEAA, requesting their participation.

In New Zealand questionnaires were emailed to CEOs or senior managers and included the personalised letter.

Questionnaires were sent to and response rates were:

	Organisers			Venues			Registration companies	
	Sent	Responded	Response rate	Sent	Responded	Response rate	Sent	Responded
Australia	79	38	48%	38	16	42%	2	2
New Zealand	30	8	27%	14	4	29%	2	2

Note: There was an increase in response rates of approximately 8% with Australian organisers and a marginal decrease with New Zealand organisers compared to the previous study.

Number of exhibitions and events

The responses from the respective venues and organisers represented the following number of exhibitions or events:

	Organisers		Venues	
	Number of organisers	Number of exhibitions/events	Number of venues	Number of exhibitions/events
Australia	38	126	16	325
New Zealand	8	34	3	27

Methodology (Cont'd)

Confidence interval and weighting

The exact size of the exhibition and events industry that falls within the criteria of a minimum of 500 square meters is unknown.

Market estimates were based on the returns received from organisers, venues and registration companies as well as discussions with professionals in the industry.

It is important to note though that not all respondents answered all questions.

The methodology adopted to calculate the totals was by initially calculating the averages, 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.

For the Australian market the primary source of data was from venues, assisted significantly by the data from trade show registration companies. For New Zealand, however, due to the limited data from venues, the primary source of data was from organisers.

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 benchmark studies of the industry in 2001 and 2002.

The committee had subsequently acknowledged the value of the study and therefore contracted Micromex to once again analyse the market for the year 2003/04.

Executive Summary

When examining the outcome of this study it is important to note that the data has been collected from a number of sources i.e. venues, organisers and registration companies. This report includes a compilation of the responses to the questionnaires returned from these various sources.

Micromex has included the responses of venues and organisers so that the reader may observe that there were subtle differences.

Key observations

Australia

- The responses from venues represented 325 exhibitions or events
- The total number of exhibitions or events was estimated to be approximately 380
- Approximately 56% of these exhibitions were public
- 32% of these exhibitions were held in NSW, 25% in Vic and 22% in QLD
- Average gross space at these exhibitions was 14,656 m² for public and 4,174 m² for trade
- The total gross space occupied was approximately 4.2 million m²
- In the year 2003/04 venues reported an additional gross space for 'new shows' of **196,832 m²**
- These exhibitions attracted approximately 3.7 million public visitors and 614,000 trade visitors
- The total number of exhibitors was estimated to be approximately 82,000

New Zealand

- 68% of reported exhibitions in New Zealand were public
- Almost 50% of exhibitions were held in Auckland
- There were an estimated 19 trade and 40 public exhibitions during the year 2003/04
- There were approximately 78,000 trade visitors and 754,000 public visitors during this period
- The total gross space occupied was estimated to be 373,000m²
- There were an estimated 10,000 exhibitors during this period

Summary of findings - Australia

- There were approximately 380 exhibitions and events held in Australia in 2003/04 that were in excess of 500 m² net space

Type of exhibition

	Organisers	Venues
▪ Public	48%	56%
▪ Trade	45%	39%
▪ Trade/Public	6%	5%

Public shows dominated the types of exhibitions or events held during the year 2003/04.

In 2001 the number of public exhibitions was estimated to be approximately 40% with trade just over 50%. In 2002 this was reversed with the majority of exhibitions being public. The above figures, from both organisers and venues, suggest that in 2003/04 the majority of exhibitions held were public.

Location of exhibition or event

	Organisers	Venues
▪ NSW	39%	32%
▪ VIC	31%	25%
▪ QLD	14%	22%

Both sources indicate that NSW is marginally ahead of Victoria in the number of exhibitions or events held each year, followed closely by Queensland.

In 2001 49% of exhibitions were reported to be held in NSW, 29% in VIC and 13% in QLD. In 2002 there was a reduction in NSW to 43% and VIC to 23% while QLD increased to 18%.

The data in this report shows a further reduction in NSW while VIC and QLD have gained in market share.

Frequency

- 81% of the exhibitions or events were held annually

This figure has remained static with 81% in 2001 and 79% in 2002 being held annually.

Seminars, conferences or congress

▪ On floor seminars	79%
▪ An attached conference	39%
▪ Congress	2%

Exhibitions with on floor seminars remained almost identical to 2002, however, the reported number of attached conferences increased from 14% in 2002 to 39% in 2003/04.

Summary of findings – Australia (Cont'd)

Space occupied and space sold

Organisers: The average net space sold and gross space occupied was:

- Average net space sold 5,329 m²
- Average gross space occupied 12,797 m²
- Net space overall was sold as 'shell scheme' 50%

Venues: Average gross space was:

- Public 14,656 m²
- Trade 4,174 m²
- Trade/Public 8,464 m²
- Average 9,098 m²

In 2001 the average net space sold was estimated to be 4,701 m² giving a gross of 1.25 million m². This was reported to have decreased in 2002, however, we found in 2003/04 this has once again increased to over 5,000 m².

In 2001 the average gross space was estimated to be approximately 11,000 m². This declined in 2002 to just over 8,000 m² but we found in 2003/04 that this has increased to approximately 9,000 m².

Total gross space occupied during the year 2003/04 was:

- Trade Shows 626,000 m²
- Public Shows 3,370,800m²
- Trade/Public Shows 160,800 m²
- **Total 4,157,600 m²**

The gross space occupied decreased from 3.0 million m² in 2001 to 2.5 million m² in 2002 but has increased significantly to 4.2 million m² in 2003/04.

Gross net space sold:

Gross net space sold (42% of gross space occupied): **1,746,000 m²**

The gross net space sold has increased from 1.2 million m² in both 2001 and 2002 to 1.7 million m² in 2003/04.

New Shows

Total gross space occupied by 'new shows' during the year 2003/04:

- Trade Shows 73,102 m²
- Public Shows 96,280 m²
- Trade/Public Shows 27,450 m²
- **Total 196,832 m²**

Summary of findings – Australia (Cont'd)

Percentage of space sold as 'shell scheme'

- Trade exhibitions 55%
- Trade/Public exhibitions 55%
- Public exhibitions 43%

In 2002 this was reported to be 55%.

Number of exhibitors

The average number of exhibitors at each exhibition or event was:

- Public 184
- Trade 257
- Trade/Public 223

- Combined average 221

When projected over the whole industry we found the number of exhibitors to be approximately 82,000.

The average number of exhibitors in 2001 was estimated to be 221 for a total of 59,007. This was reported to have decreased to 165 in 2002 for a total of 48,000 exhibitors.

We found in 2003/04 that the average number of exhibitors has increased again to the 2002 figure of 221 for a total of 82,000 exhibitors.

International exhibitors

62% of organisers reported that they did not have any overseas exhibitors.

Of those who did, i.e. 38%, the average number of overseas exhibitors was 7%.

In 2001 international exhibitors was estimated to be 8%, in 2002 4% and in 2003/04 7%.

Space rate

- The overall average published space rate including shell costs was: \$315 m²
- The overall average published space rate excluding shell costs was: \$260 m²

There was a 5% increase in 'excluding shell' rates and a 3% increase in 'including shell' rates compared to 2002.

Summary of findings – Australia (Cont'd)

Number of visitors

Trade

The average number of visitors to a trade exhibition was 4,100.

This gives a total for trade exhibitions of 614,000 visitors.

Public

The average number of visitors to a public exhibition was 17,377.

This gives a total for public exhibitions of 3,684,000.

- **Industry wide, the total number of visitors was between 4.2 million and 4.4 million**

In 2001 there was an average of 14,800 visitors per exhibition giving a total of 3.9 million visits.

This was reported to have fallen in 2002 to 12,000 with a total of 3.8 million visits.

We found that in 2003/04, although the average number of visits per exhibition was approximately 10,000, there were more public exhibitions that attracted a greater number of visitors. The net result was a total number of visits in excess of 4.2 million.

Entry price

- Average entry price: \$12.67

The average entry price increased from \$11.00 in 2002 to \$12.67 in 2003/04 (+15%).

Summary of findings – New Zealand

- There were approximate 49 exhibitions held in New Zealand in 2003/04 that were in excess of 500 m² net space
- All dollars quoted in this section are in \$NZ
- Field days, although significant in their size and impact on the industry, were excluded from this study

Type of Exhibition

- Public 68%
- Trade 32%

The number of public exhibitions decreased from 71% in 2003 to 68% in 2003/04.

Frequency

95% of the exhibitions or events were held annually and almost half were held in Auckland.

In 2002 89% of exhibitions were reported to have been held annually.

Seminars

- 70% of the exhibitions included on floor seminars

In 2002 82% of exhibitions were reported to have 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 6,327 m²
- Average net space sold 3,609 m²
- Total gross space occupied 373,293 m²
- Total net space sold 212,931 m²

In 2002 we found that the average gross space was 8,000 m² and the average net sold 4,800 m².

The total gross space in 2002 was 399,000 m² and the total net space sold 243,000 m².

Shell scheme

- 90% of net space overall was sold as 'shell scheme'

In 2002 97% of overall space was sold as 'shell scheme'.

Summary of findings – New Zealand (Cont'd)

Number of exhibitors

On average there were 186 exhibitors at each exhibition or event.

When projected over the whole industry, we found the number of exhibitors to be 9,955.

The estimated average number of exhibitors decreased from 204 in 2002 to 186 in 2003/04.

The total number of estimated exhibitors decreased from 10,200 in 2002 to 9,955 in 2003/04.

International exhibitors

Overall, international exhibitors represented approximately 4% of all exhibitors.

In 2003 the international exhibitors was estimated to be 3%.

Space rate

- The overall average published space rate including shell costs was: \$233 m²
- The overall average published space rate excluding shell costs was: \$188 m²

The space rates have increased since 2002.

The rates, including shell costs, increased from \$171 in 2002 to \$233 in 2003/04.

The rates, excluding shell costs, increased from \$164 in 2002 to \$188 in 2003/04.

Number of visitors

Trade

- The average number of visitors to trade exhibitions was 4082 for a total of 77,571 visitors.

In 2002 the average number of trade visitors was estimated to be 4,200 for a total of 64,000 visitors.

Public

- The average number of visitors to public exhibitions was 18,870 or a total of 754,000 visitors.

In 2002 the average number of public visitors was estimated to be 13,000 for a total of 442,000 visitors.

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

Entry price

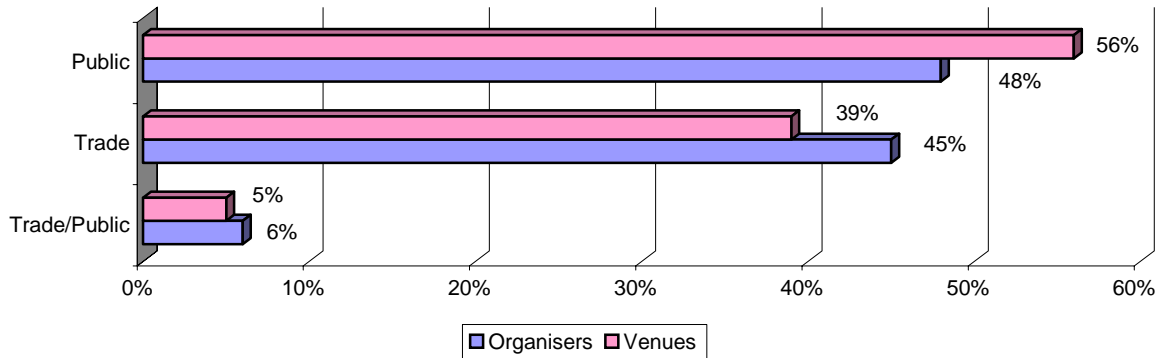
Average entry price: \$11.00

The average entry price to public shows remained unchanged since 2002.

Detailed Analysis of Exhibitions and Events in Australia

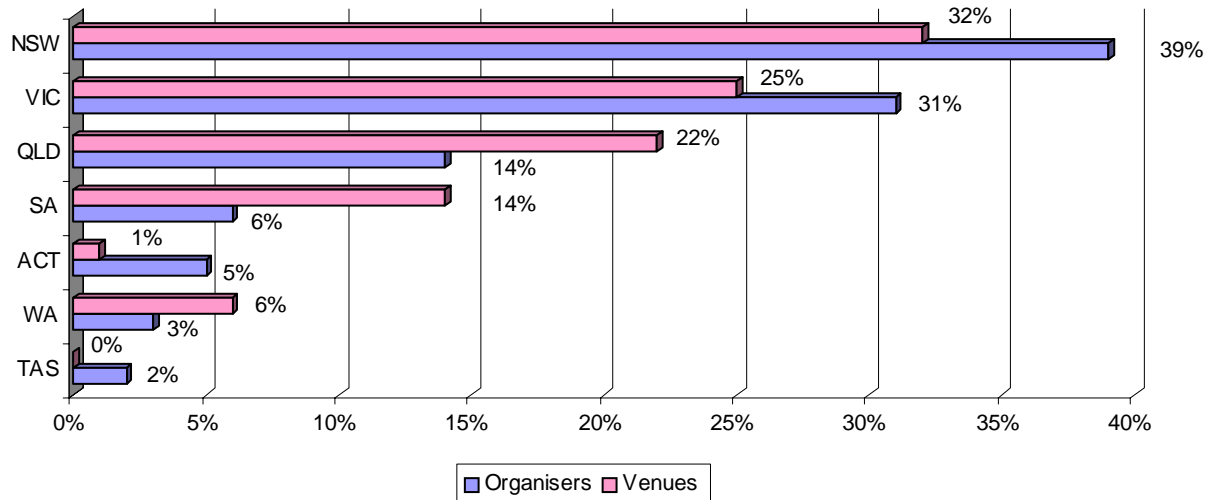
Section A: Organiser and exhibition details

Type of exhibition



	Count Organisers	Col % Organisers	Count Venues	Col % Venues
Public	61	48%	189	56%
Trade	57	45%	132	39%
Trade/Public	8	6%	19	5%
Total	126	100%	340	100%

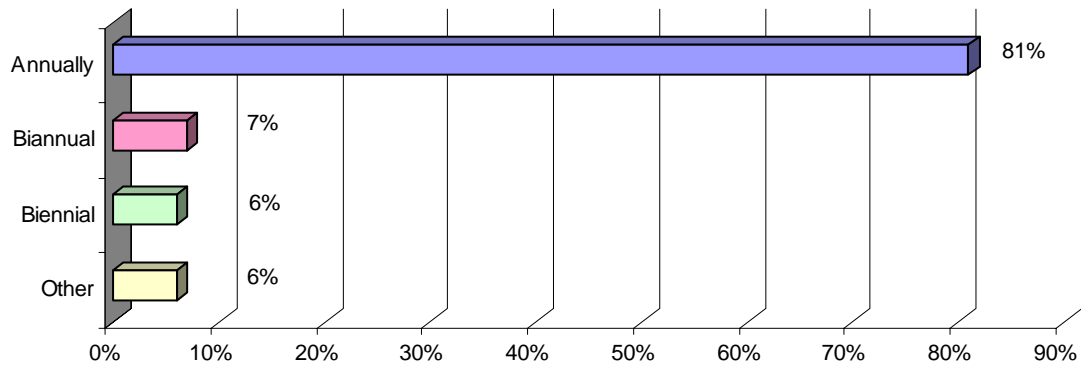
State in which the exhibition or event was held



	Count Organisers	Col % Organisers	Count Venues	Col % Venues
NSW	49	39%	109	32%
VIC	40	31%	86	25%
QLD	18	14%	75	22%
SA	8	6%	46	14%
ACT	6	5%	4	1%
WA	4	3%	20	6%
TAS	2	2%	0	0%
Total	127	100%	340	100%

Section A: Organiser and Exhibition details – Australia (Cont'd)

Frequency of the exhibition

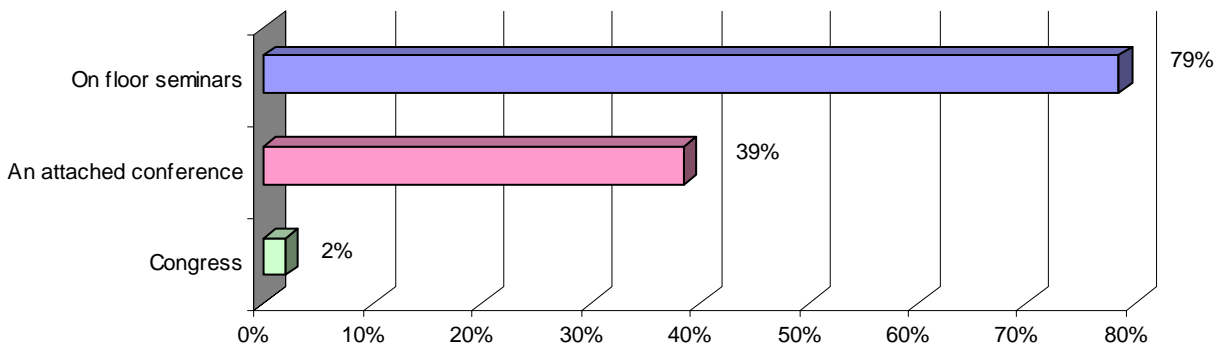


	Count	Col %
Annually	102	81%
Biannual	9	7%
Biennial	8	6%
Other	7	6%
Total	126	100%

Section B - Australia

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

Overall, the exhibitions or events included the following:



- On floor seminars 79%
- An attached conference 39%
- Congress 2%

Net and gross space sold

Organisers

From the 126 events and exhibitions we found that the average gross and net space was:

- Average net space sold 5329 m²
- Average gross space occupied 12,797 m²
- The average percentage of net space sold as a shell scheme 50%

Venues

The data from the venues was more indicative of the industry wide space requirements for exhibitions and events.

The average gross space occupied for trade and public shows, was estimated to be:

	Public	Trade	Trade/Public
Gross space	14,656 m ²	4,174 m ²	8,464 m ²

Section B – Australia (Cont'd)

Based on the estimation that the number of exhibitions and events held in Australia in 2003/4 was approximately 380, we can project the total net space sold and gross space occupied to be in the range:

The total gross space occupied during the year 2003/04 was:

	Total gross space
Trade Shows	626,000 m ²
Public Shows	3,370,800 m ²
Trade/Public Shows	160,800 m ²
Total	4,157,600 m²

If we assume, based on the organiser's data that the net space sold represents 41% of gross space, the total net space for all exhibitions and events in Australia was approximately:

Gross net space sold (41% of gross space occupied): 1,746,000 m²

New Shows

The venues were asked to indicate the gross space for 'New Shows/Exhibitions' in the period 2003/04.

Note: These figures are included in the total gross figures above.

	Total gross space
Trade Shows	73,102 m ²
Public Shows	96,280 m ²
Trade/Public Shows	27,450 m ²
Total	196,832 m²

Percentage of net space sold as 'shell scheme'

- Trade exhibitions 55%
- Trade/Public exhibitions 55%
- Public exhibitions 43%

Section B – Australia (Cont'd)

Number of exhibitors

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

	Public	Trade	Trade/Public	Combined average
Average	184	257	223	221

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

- Total number of exhibitors at public events: 33,561
- Total number of exhibitors at trade events: 43,974
- Trade/Public events: 4,237

Trade and public events combined:

- Total number of exhibitors: 81,772

Note: Some exhibitors participate in multiple events. The above figure therefore represents the estimated aggregate of exhibitors at all events.

Percentage of international exhibitors

62% of organisers reported that they did not have any overseas exhibitors.

Of those who did, i.e. 38%, the average number of overseas exhibitors was 7%.

Published space rate

	Trade	Public	Trade/Public
Cost – excluding shell	\$219 m ²	\$310 m ²	\$299 m ²
Cost – including shell	\$265 m ²	\$347 m ²	\$326 m ²

The overall average published space rate including shell costs was: \$315 m²

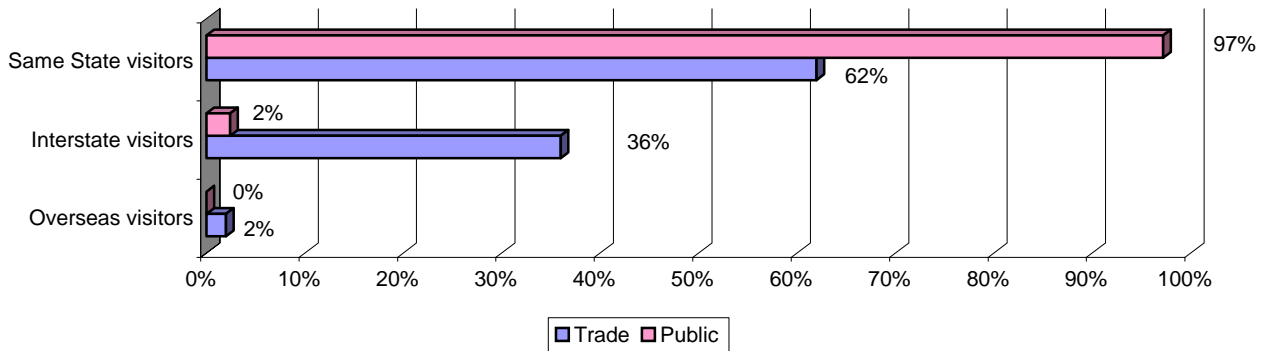
The average published space rate excluding shell costs was: \$260 m²

Section B – Australia (Cont'd)

Total number of visitors (000's)

The data from the three primary sources of information for this study, venues, organisers and registration companies, indicated that the total number of visitors to exhibitions and events were:

- **Total number of visitors to exhibitions and events in 2003/04: 4.2 – 4.4 million**



Trade	Count (000's)	Col %
Same State visitors	380	62%
Interstate visitors	221	36%
Overseas visitors	12	2%
Total	614	

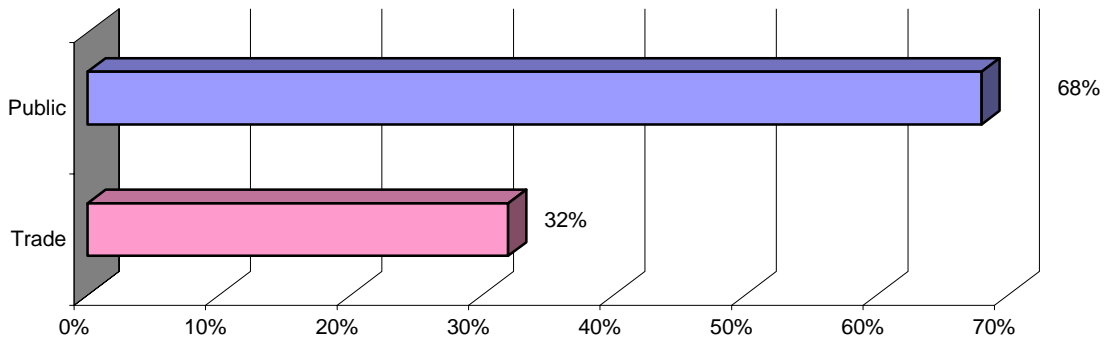
Public	Count (000's)	Col %
Same State visitors	3,582	97.2%
Interstate visitors	88	2.4%
Overseas visitors	14	<1%
Total	3,684	

Average entry price to public exhibitions

- Average entry price based on 57 responses was: **\$12.67**

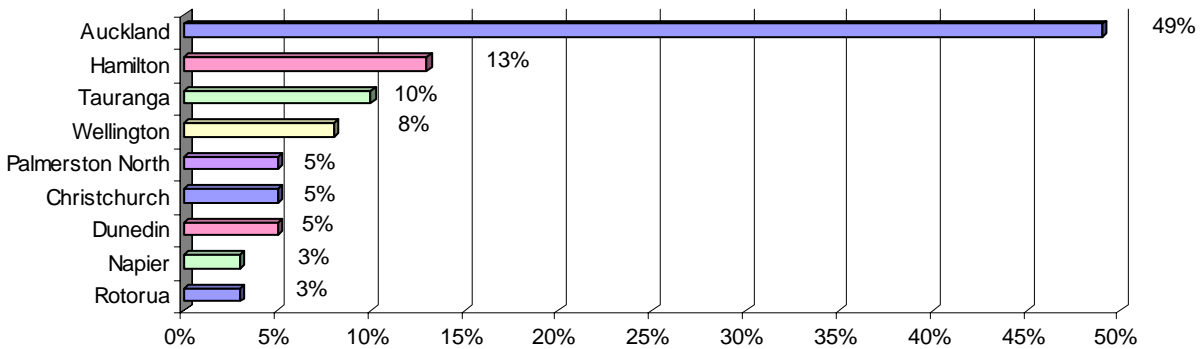
Section A: Organiser and exhibition details

Type of exhibition



	Count	Col %
Public	40	68%
Trade	19	32%
Total	59	100%

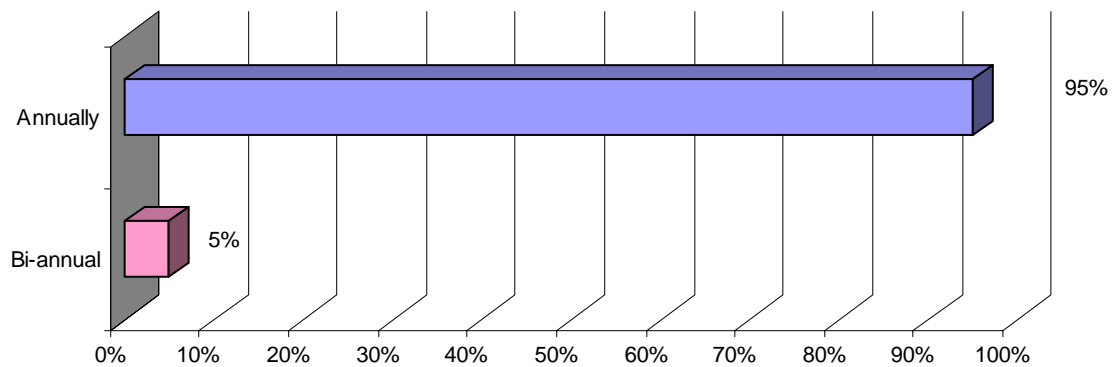
City in which the exhibition was held



	Count	Col %
Auckland	19	49%
Hamilton	5	13%
Tauranga	4	10%
Wellington	3	8%
Palmerston North	2	5%
Christchurch	2	5%
Dunedin	2	5%
Napier	1	3%
Rotorua	1	3%
Total	39	100%

Section A: Organiser and exhibition details – New Zealand (Cont'd)

Frequency of the exhibition



	Count	Col %
Annually	35	95%
Bi-annual	2	5%
Total	37	100%

Section B – New Zealand

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

70% of the exhibitions included on floor seminars

Net space sold

- Average net space sold 3,609 m²
- Total net space 212,931 m²

Gross space occupied

- Average gross space occupied 6,327 m²
- Total gross space 373,293 m²

Percentage of net space sold as 'shell scheme'

- Average % net space sold as 'shell scheme' 90%

Total number of exhibitors

- Average number of exhibitors 186

When projected over the whole industry this represents approximately 9,955 exhibitors

Percentage (if any) of international exhibitors

- Average % international visitors 4%

Section B – New Zealand (Cont'd)

Published space rate excluding shell cost

- Average published space rate excluding cost of shell \$188 per square meter

Published space rate including shell cost

- Average published space rate including cost of shell \$233 per square meter

Total number of trade visitors

- Average number of trade visitors 4,082

Based on 19 trade exhibitions per year this results in a total of 77,571.

Total number of public visitors

- Average number of public visitors 18,870

Based on 40 public exhibitions per year this results in a total of 754,000.

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

Average entry price to public exhibitions

- Average entry price to public exhibitions \$10.40

Organisations that responded

Australian Respondents (Organisers)

ADMA
Australian Events
Australian Exhibition Services
Australian Exhibitions & Conferences Pty Ltd
Australian Trucking Association
Berg Bennett Pty Ltd
Boating Industry Association NSW
Boating Industry Association Victoria
Boating Industry Association QLD
Caravan & Camping Industry Association of NSW
Caravan Trade & Industries Association of QLD
Definitive Events
dmg world media
Events Unlimited International Pty Ltd
Exhibition & Trade Fairs
Exhibition Management Pty Ltd
Exhibition Marketing Pty Ltd
Exhibitions Plus
Exhibit Exhibitions & Publishing Pty Ltd
Expertise Events
Gift & Homewares Australia
Hannover Fairs Australia
Haymarket Events Pty Ltd
Housing Industry Association
Maritime Australia Limited
On Target Communications Pty Ltd
Organisers International
Parents Babies & Children's Expo Pty Ltd
Pet Industry Association of Australia
Quitzy Pty Ltd
Reed Travel Exhibitions
Single Market Events
Swan Exhibitions
Sydney Convention & Visitors Bureau
Terrapinn
The Pharmacy Guild of Australia, Victoria Branch

New Zealand Respondents (Organisers)

dmg world media
Mystery Creek Events Centre
North Port Events
Hannah & Associates
House & Home Exhibitions Ltd
Peacock Promotions Ltd
Premiere Exhibitions
Bay Events Ltd

Venues that responded

Australian Respondents (Venues)

Adelaide Entertainment Centre
Brisbane Convention & Exhibition Centre
Claremont Showgrounds Exhibition Centre
Conrad Jupiters Gold Coast Casino
Four Points Sheraton - Sydney
Melbourne Exhibition and Convention Centre
National Convention Centre
Playbill Venue Management (Hordern Pavilion & Royal Hall of Industries)
Rosehill Gardens Event Centre
Royal Adelaide Showground
Royal Exhibition Building
Sydney Convention and Exhibition Centre
Sydney Entertainment Centre
Sydney Showground
Toowoomba Showgrounds
Townsville Entertainment and Convention Centre

Australian Respondents (Registration companies)

Info Salons
Tradevent

New Zealand Respondents (Venues)

Mystery Creek Event Centre
North Shore Events Centre
Westpac Stadium
Auckland Convention Centre at The Edge

New Zealand Respondents (Registration companies)

Info Salons
Tradevent