



**2005
Meetings & Events Industry
National Conference**

**The World of Meetings and
Events**

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**National Business Events
Study**

**An Evaluation of
the Australian
Business Events
Sector**





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Background to the Study

- Perceived need by industry to update information on the industry
- Previous study, *Meetings Make Their Mark, 1999*

Initiated by BECA and STCRC and funded by:



- Meetings & Events Australia
- Tourism Australia
- Sustainable Tourism Co-operative Research Centre (STCRC)
- Association of Australian Convention Bureaus
- Exhibition and Event Association of Australasia
- Gold Coast Tourism – Business Tourism Division
- Tabcorp



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Study's Aims

- The study aimed to be a national 'stocktake' of the business events industry
 - Size
 - Economic contribution
 - Decision-making processes of delegates/attendees

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NBES


Collected data from all sub-sectors

- Meetings
- Conferences
- Exhibitions
- Incentives

Through

- Organisers, delegates and trade visitors



531 venues
6,668 delegates and trade visitors
161 conference organisers
843 exhibitors
51 organisations



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**Key Findings: Overall
Economic Contribution**

- The overall estimated expenditure in excess of \$17 billion.
- The direct contribution to value added was over \$6.1 billion.
- The direct contribution to employment is estimated to be 116,000 jobs.

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Key Findings: Overall Economic Contribution (contd)



- The international component is:
 - \$1.8 billion in direct expenditure
 - \$638 million in contribution to value added, and
 - contribution to employment of over 17,000 people.

Expenditure Summary



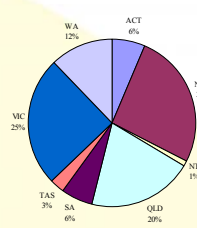
	Expenditure \$	Direct contribution to value added \$	Direct contribution to employment
Meeting and Conference Delegates	11.5 billion	4.5 billion	78 thousand
Meeting Organisers	2.5 billion	707 million	16 thousand
Exhibitors	2.3 billion	522 million	12 thousand
Trade Visitors	540 million	179 million	4 thousand
Incentive Travel Sector	585 million	207 million	6 thousand
Total Direct Effect	17. 4 billion	6.1 billion	116 thousand
Domestic	15.5 billion	5.5 billion	99 thousand
International	1.9 billion	638 million	17 thousand
Total Direct Effect	17. 4 billion	6.1 billion	116 thousand
Indirect Effects		5.2 billion	98 thousand
Total (direct + indirect) Effects		11.25 billion	214 thousand

Venue Survey



- Total number of business events hosted in Australia during 2003 – 316,000
- 22.8 million participants

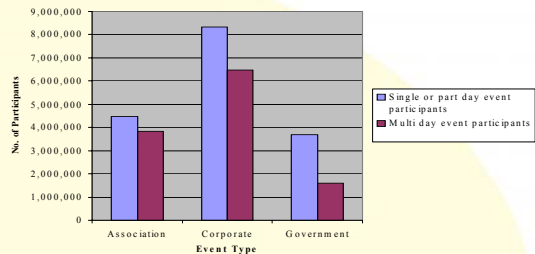
Breakdown of events by state



Venue Survey



Participants by event type and duration



Delegate and Trade Visitor Survey: Profile



- Breakdown of delegates and trade visitors:
 - Internationals 1%
 - Interstate 4%
 - Intrastate 8%
 - Locals 87%



Delegate and Trade Visitor Survey: Accommodation and Stay



Accommodation used by delegates

- Luxury: 14%
- Deluxe: 56%
- Standard: 26%
- Budget: 4%

Average stay by delegates:

- international 7.3
- interstate 3.6
- intrastate 1.3



Delegate and Trade Visitor Survey: Expenditure



- Estimated average total expenditure
 - Internationals \$3,526
 - Interstate \$2,019
 - Intrastate \$892
 - Locals \$430
- Estimated average daily expenditure
 - International: \$554
 - Interstate: \$557
 - Intrastate: \$333
 - Local: \$174



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Exhibitors



The breakdown of exhibition type was:

Exhibition at a conference:	22%
Trade only:	25%
Trade and public:	53%

- Average exhibitor expenditure: \$9,150

(range = \$7,740 for intrastate exhibitors to \$42,000 for international exhibitors)



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Incentive Travel Organisers



- More than 6000 incentive programs hosted in Australia in 2003 providing over 1.5 million delegate nights
- Average expenditure per delegate

- Long Haul (Europe and Americas)	\$2,560
- Short Haul (Asia and Oceania)	\$2,180
- Australia	\$1,224



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Incentive Travel: Findings



Events by Region and Industry

- Three top regions:
 - S.E Asia
 - N.E Asia
 - Oceania
- Three top industries:
 - Pharmaceutical
 - Electrical
 - IT

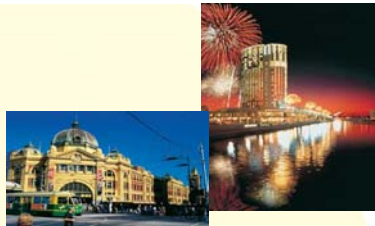


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Incentive Travel: Destinations of International Visitors

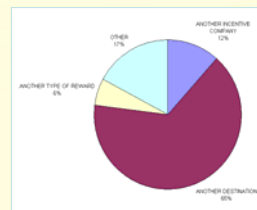


Destination	%
Sydney	51
Gold Coast	28
Brisbane	22
Blue Mountains	20
Melbourne	17
Cairns	15
Perth	14
Port Douglas	14



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Incentive Travel: Findings



Reasons for Lost Business

- Price - chose cheaper option
- World events e.g. SARS,
- Competition
- Non availability of flights
- Destination's inability to meet needs of participants
- Distance barrier
- Visa problems

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Recommendations

- Need for ongoing monitoring
- Need for a template/ software for venue data
- May need to approach accommodation properties for more detailed information.

