Convention Activity Survey Year to June 2013 report

Prepared September 2013





Contents

	Introduction	3
	CAS participants	
	Convention Bureaux	
	Qualifying CAS Venues	
	Overview of event activity for the year ended June 2013	6
	Trends in the number of events reported since YE June 2010	7
	Trends in larger events (>100 delegates)	9
	Conference/Convention activity for year ended June 2013	10
	Trends in multi-day conferences	11
Α	Appendix 1– Regional results	13



Overview

A total of 588,000 delegates attended 6,000 conferences for around 1.25 million delegate days in the year ended June 2013. This compared to 537,000 delegates, 5,600 conferences and 1.2 million delegate days in the year ended June 2012. Around 33 per cent of multi day conferences and 38 per cent of one day conferences were held in Auckland in the year ended June 2013.

Over all events <u>excluding special occasions</u>, 3,146,000 delegates attended 40,300 events for around 4.1 million delegate days in the year ended June 2013. This compared to 2,937,000 delegates, 42,300 events and 4.0 million delegate days in the year ended June 2012. Thirty two per cent of all events were held in Auckland.

Introduction

The Convention Activity Survey (CAS) measures event activity at qualifying venues in New Zealand. The event activity measured includes meeting/seminar, incentive activity, conference/convention, trade show/exhibition, and special occasion, commonly known as MICE activity. The CAS is part of a broader Convention Research Programme, in which the Convention Delegate Survey measures the annual contribution of multi-day convention and conference activity to the New Zealand economy.

Suggestions and feedback on the report content and layout are welcome – please contact Peter Ellis (phone: 04 498 7448; email: Peter.Ellis@mbie.govt.nz).

CAS participants

Convention Bureaux

There are 13 Convention Bureaux participating in the Convention Research Programme for the 2012/2013 year. As such, the CRP is not a national programme but covers a significant majority of conference/convention activity in New Zealand. The participating Convention Bureaux are Auckland, Bay of Plenty, Hamilton and Waikato, Rotorua, Taupo, Hawke's Bay, Manawatu, Wellington, Marlborough, Nelson, Christchurch and Canterbury, Dunedin and Queenstown.



Qualifying CAS Venues

The Convention Bureaux and the Ministry of Business, Innovation and Employment have agreed that to qualify for inclusion in the Convention Activity Survey, a venue must

- promote their venue as suitable for a range of business-related MICE activities, especially conventions/conferences and meetings
- have theatre-style *minimum* capacity of 50
- aim or plan to host a minimum of 12 conventions and/or business related events each year

Venues are also classified in five different types, as follows:

- **Event or Convention Centre**: Venue whose primary function is hosting conventions, conferences and other large business events.
- Stadium/showground: Facility usually designed for large events, for example trade shows, exhibitions, conferences and other business events.
- **Hotel:** An establishment that provides accommodation and has onsite conference and other function facilities such as meeting rooms.
- Other Accommodation (Motel, Motor Lodge etc.): Other primarily accommodation establishments with conference facilities not classed as a hotel.
- Other Venues: Other establishments that provide conference and function facilities but not accommodation, for example restaurants, vineyards, and theatres.

The delegate capacity for a venue is defined as the largest number of MICE delegates that can be comfortably hosted at one time in spaces regularly used to host MICE events within the venue. The estimate is based on minimal partitioning and theatre style set up of free-form spaces. The capacity of spaces used only for non-MICE events (for example, concerts and sporting events) is excluded from the reported delegate capacity.

Venues do not have to be a member of the Convention Bureau in their area, nor do they have to agree to submit data in order to be included in the venue population list. Each Convention Bureaux is asked to identify the entire population of qualifying CAS venues in its area. In the June 2013 quarter, event activity was recorded or estimated for a total of 349 venues in the 13 regions.

In the June 2013 quarter, 137 venues (55% of recorded capacity) submitted data for at least one of the three months. The number of venues actively contributing data to the CAS has remained relatively constant over the last two years, ranging between 135 and 147 venues each quarter.

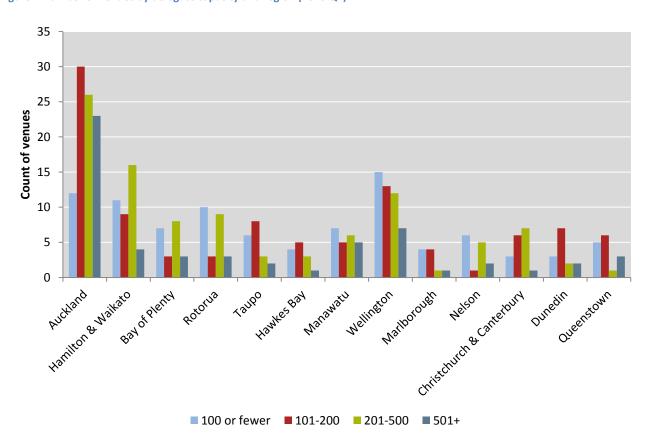


Table 1 Comparing venue participation rates for 2013 Q1 and 2013 Q2

Region	Venues submitting a identified in region		Capacity of venues submitting as % of capacity in region			
	2013Q1	2013Q2	2013Q1	2013Q2		
Auckland	30%	30%	50%	49%		
Hamilton & Waikato	28%	25%	75%	39%		
Bay of Plenty	38%	29%	26%	22%		
Rotorua	36%	40%	78%	82%		
Taupo	32%	32%	33%	33%		
Hawkes Bay	46%	46%	72%	72%		
Manawatu	30%	30%	40%	40%		
Wellington	55%	49%	85%	81%		
Marlborough	50%	60%	72%	82%		
Nelson	36%	43%	58%	70%		
Christchurch & Canterbury	81%	65%	90%	86%		
Dunedin	54%	57%	65%	38%		
Queenstown	53%	73%	36%	87%		
Total	40%	39%	60%	55%		

The distribution of the venues by size is shown in Figure 1 below. Ninety-one venues (26%) are located in Auckland.

Figure 1 Number of venues by delegate capacity and region (2013 Q2)





Overview of event activity for the year ended June 2013

An estimated total of about 51,500 events occurred in the 13 regions in the year ended June 2013. Sixty one per cent of these were meetings/seminars. Table 2 shows about 39% of the delegate days for the year ended June 2013 were in Auckland.

Table 2 National overview of MICE activities (YE June 2013)

Region	Single day	Multi- day	Total Events	Delegates (all		Delegate da	ys
	Events	Events		events)	Count	Market share	Change in market share from June 2012
Auckland	12,809	3,633	16,442	1,822,979	2,189,905	39%	-3%
Hamilton & Waikato	4,904	881	5,784	521,258	597,977	11%	2%
Bay of Plenty	2,169	415	2,584	217,129	250,347	4%	1%
Rotorua	1,816	682	2,498	180,124	259,057	5%	-1%
Taupo	1,343	507	1,851	129,221	185,470	3%	No change
Hawkes Bay	1,358	165	1,523	99,384	107,490	2%	No change
Manawatu	3,294	696	3,990	376,497	431,106	8%	No change
Wellington	6,408	2,103	8,511	602,915	801,261	14%	-1%
Marlborough*	660	165	825	45,971	56,918	1%	NA
Nelson	1,318	277	1,595	119,451	153,416	3%	-1%
Christchurch							
& Canterbury	2,994	634	3,628	327,232	398,538	7%	1%
Dunedin	903	243	1,146	75,033	96,077	2%	No change
Queenstown	656	455	1,111	79,151	135,133	2%	No change
Total	40,631	10,856	51,488	4,596,343	5,662,693		

^{*}Marlborough joined the programme in July 2012, so only one year of activity is recorded.

There were over 5.6 million delegate days in the year ended June 2013. Error! Reference source not found. shows the split in delegate days for different event types for the last four quarters. The variation by season can clearly be seen. Over all event types combined, there was a peak in the December quarter followed by a trough in the March quarter. However the September quarter was the peak season for conference/convention numbers and the June quarter was the peak season for meetings/seminars and trade shows/exhibitions.

Table 3 Delegate days by event type for each quarter during the year to June 2013

Event type	2012Q3	2012Q4	2013Q1	2013Q2	Total
Meeting/seminar	451,140	455,079	342,916	467,256	1,716,391
Incentive activity	21,005	46,522	35,842	36,765	140,134
Conference/convention	409,359	308,214	256,258	278,524	1,252,354
Trade show/exhibition	265,495	220,982	194,663	320,413	1,001,552
Special occasion	323,504	515,173	345,648	367,938	1,552,263
Total	1,470,503	1,545,970	1,175,327	1,470,896	5,662,693



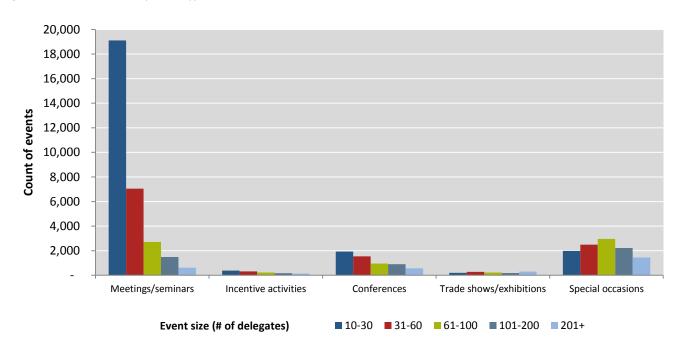
Table 4 shows that most events in the year ended June 2013 were commissioned by businesses, with associations and government entities coming a distant second and third.

Table 4 Type of organisation commissioning an event

Events run for	2012Q3	2012Q4	2013Q1	2013Q2	Total
Associations	2,270	2,366	1,413	2,244	8,293
Business	6,892	6,491	4,810	6,339	24,532
Government	1,398	1,663	1,204	1,776	6,041
Education	1,549	1,014	885	1,201	4,650
Personal	1,189	1,445	1,725	1,093	5,451
Other/don't know	499	615	504	736	2,354
Total	13,797	13,594	10,541	13,390	51,320

With the exception of special occasions, small events with fewer than 60 delegates attending dominate MICE activity in the year ended June 2013 (refer Figure 2). Small meetings/seminars formed 52% of all events, with about 19,000 meetings having 10-30 delegates and about 7,000 meetings with 31-60 delegates. Smaller conferences also dominated conference activity, with 33% having 10-30 delegates and a further 26% having 31-60 delegates.

Figure 2 Number of events by event type and event size (YE June 2013)



Trends in the number of events reported since YE June 2010

Since June 2010 quarter, it has been possible to construct rolling annual totals for different variables. Figure 3 shows variation or trend for the number of events (meetings, incentive activities, conferences, trade shows/exhibitions, and special occasions) reported for each year ended quarter

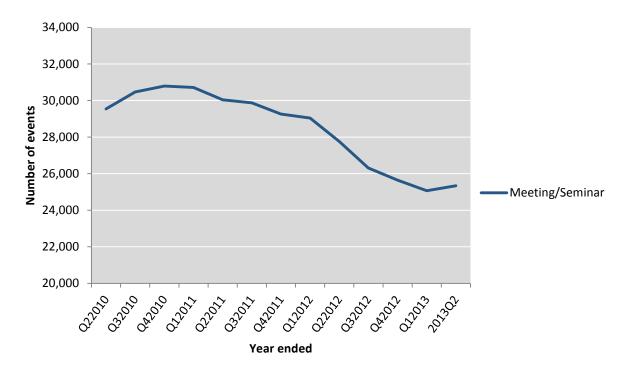


from June 2010 to June 2013. Note that Bay of Plenty, Hamilton & Waikato and Marlborough have been excluded, given that they have not been contributing data for the whole period shown in the chart.

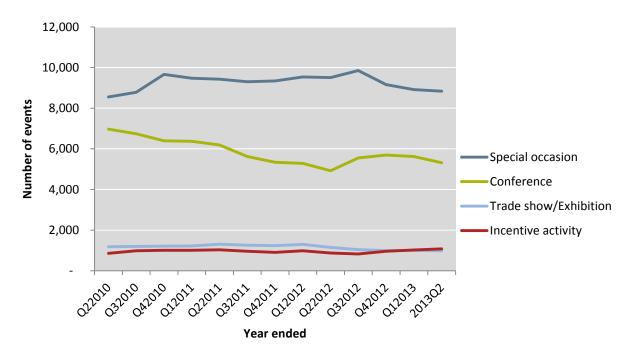
As can be seen, the number of meetings/seminars reported has picked up slightly in the year ended June 2013 after having fallen off each quarterly year end since December 2010. Special occasions continued to fall in the year ended June 2013 since peaking in the year ended September 2012.

Conference/convention activity fell further from the year ended March 2013 but is still above the trough in the year ended June 2012.

Figure 3 Trend in number of events by event type (YE June 2010 through to YE June 2013). Bay of Plenty, Hamilton & Waikato and Marlborough are excluded.



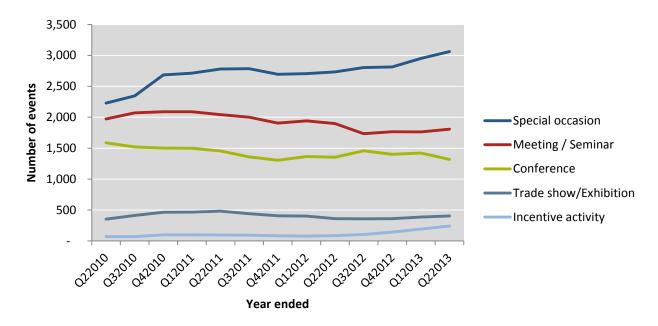




Trends in larger events (>100 delegates)

It appears that there has been an increase in large special occasion events (100+ delegates) since the CAS started in July 2009. Over the same period, the number of larger meetings/seminars and conferences has declined. Trade shows/exhibitions have been reporting a roughly similar number of events over the period while the number of incentive activity events has risen. Note that this trend analysis excludes Hamilton & Waikato and Bay of Plenty (joined the CAS in 2011Q3) and Marlborough (joined the CAS in 2012Q3).

Figure 4 Number of Events with >100 delegates from YE June 2010 to YE June 2013 (excludes Hamilton & Waikato, Bay of Plenty and Marlborough)





Conference/Convention activity for year ended June 2013

In this section the focus is solely on conferences/conventions which account for 12% of all events and 22% of the delegate days in the year ended June 2013.

Table 5 shows that 3,733 (63%) of the conferences held in the year ended June 2013 were multi day events, with just over half of these (1,925) being two days in duration.

Table 5 Number of conferences and delegate days by conference duration and region (YE June 2013)

Region	Duratio	on of Conf	erence	Market share of multi day		ce Delegate ays	Market share of Multi day conference
	One day	Two days	>2 days	conferences	Single day	Multi-day	delegate days
Auckland	842	648	566	33%	78,786	375,162	35%
Hamilton & Waikato	162	125	111	6%	11,612	97,248	9%
Bay of Plenty	93	52	49	3%	5,393	34,761	3%
Rotorua	130	114	171	8%	10,275	86,401	8%
Taupo	93	98	103	5%	7,085	50,922	5%
Hawkes Bay	36	23	24	1%	2,069	9,380	1%
Manawatu	118	157	92	7%	9,873	62,972	6%
Wellington	477	469	353	22%	38,403	191,626	18%
Marlborough	31	34	33	2%	2,380	13,249	1%
Nelson	68	52	48	3%	3,776	27,645	3%
Christchurch & Canterbury	76	61	89	4%	4,893	53,729	5%
Dunedin	36	36	44	2%	2,627	19,487	2%
Queenstown	33	56	124	5%	2,922	56,125	5%
Total	2,195	1,925	1,808	100%	180,094	1,078,705	100%

Auckland hosted the greatest proportion (33%) of multi-day conferences, with 35% of the delegate days; followed by Wellington with 22% of the multi-day conferences and 18% of the multi-day conference delegate days.

Table 6 indicates that in the year ended June 2013, 47% of the multi-day conference delegates were reported to be from the local region, with a further 45% travelling to the conference from another region.

About 8% of multi-day conference delegates were from Australia or other overseas locations.

Note that the delegate origin is no longer a compulsory question in the survey, as this information is not always available to the venues recording the data. Values for missing data are imputed and this



imputation process is done independently for sub-categories and category totals. As a result, the delegate numbers by origin do not add up to the total number of delegates.¹

Table 6 Mix of multi-day conference delegates by region (YE June 2013)*

Region	Local	Regional	Australian	Other International	Total
Auckland	81,471	41,865	7,346	4,197	152,078
Hamilton & Waikato	14,907	9,873	628	985	39,333
Bay of Plenty	7,458	4,488	336	450	15,575
Rotorua	3,075	21,568	2,692	533	28,580
Taupo	2,041	12,903	859	271	16,361
Hawkes Bay	1,542	1,323	155	3	2,990
Manawatu	15,281	6,022	760	908	25,607
Wellington	33,715	38,590	1,989	1,492	70,939
Marlborough	1,705	2,744	518	72	4,767
Nelson	3,179	5,192	421	341	9,415
Christchurch & Canterbury	7,002	8,715	1,052	497	17,135
Dunedin	1,843	4,314	428	190	6,965
Queenstown	2,529	10,735	3,469	1,119	17,864
Total number of delegates	175,746	168,334	20,652	11,057	407,608

^{*}Based on estimates by venues (as opposed to the conference organisers who handle conference registration).

For the year ended June 2013, Statistics New Zealand² reported that a total of 57,392 international visitors reported that their main reason for visiting New Zealand was to attend a convention/conference (either single or multi-day). Of these, 36,032 (63%) were Australian. This was up from the previous year ended June 2012, when 50,112 international visitors stated their main reason for visiting New Zealand was to attend a convention/conference, and 30,272 (60%) were from Australia.

In comparison to the above, the CAS has a figure of 154,817 international delegates attending <u>all</u> events in the year ending June 2013, of whom 68,805 (44%) were Australian.

Trends in multi-day conferences

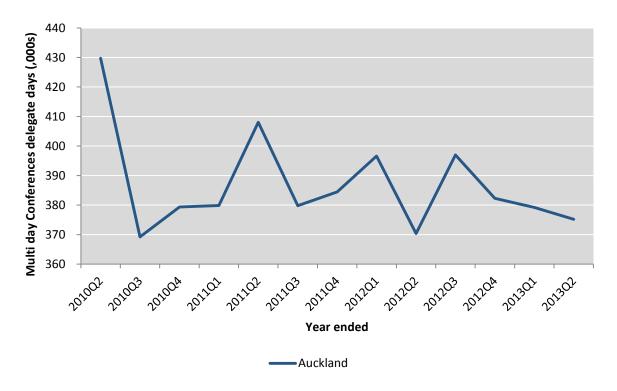
Figure 5 shows there has been quite a significant variation in the number of delegate days for multiday conferences over the period from the year ended June 2010 through to the year ended June 2013.

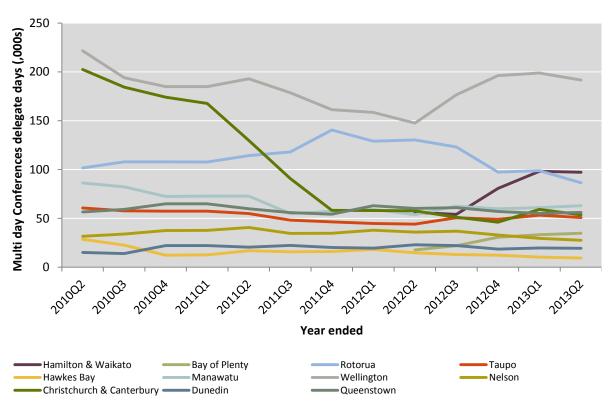
¹ Of the 137 venues that submitted data in the June 2013 quarter, 23 did not report on delegate origin for at least one event and 11 did not report delegate origin for any of their events. Six per cent of all events in the June 2013 quarter had no numbers recorded for delegate origins.

² Statistics New Zealand International Travel and Migration. Data available from http://www.stats.govt.nz/infoshare/



Figure 5 Comparing multi-day Conference delegate days by region (YE June 2010 to YE June 2013)





Bay of Plenty and Hamilton & Waikato joined the Convention Research Programme in the September 2011 quarter and so only have five quarter-year-ends included.



Appendix 1- Regional results

This appendix includes reports on regional level activity for the year ended June 2013. Each table presents information on specific type of MICE activity, namely:

- Meetings/seminars
- Incentive activity
- Conference/Conventions
- Trade Shows/Exhibitions
- Special Occasion.

Further data and comparisons may be made using the excel pivot tables available from the MBIE website (http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/other-research-and-reports/convention-research/activity-survey).



Meetings/seminars – Year ended June 2013

A meeting or seminar is defined as a formal gathering of people to discuss matters of shared interest, usually within a single session.

	Count of meet	tings for YE	Market share of	multi day	Total delegate	Count of m	eetings/sem	ninars by e	vent size (#	of
	June 2013		meetings		days	delegates)	for YE June	2013		
Region	Single day	Multi-day	YE June 2012 YE June 2013		YE June 2013	10-30 31-60 61-100		101-200 201+		
Auckland	7,755	2,147	43%	37%	699,023	5,613	2,392	921	585	316
Hamilton & Waikato	3,268	511	8%	9%	155,890	2,517	796	323	145	36
Bay of Plenty	1,343	231	3%	4%	76,974	1,010	366	140	77	26
Rotorua	1,171	295	4%	5%	68,056	966	322	109	46	19
Taupo	779	214	3%	4%	44,077	684	195	66	25	10
Hawkes Bay	846	95	1%	2%	37,478	618	200	75	40	12
Manawatu	2,224	341	5%	6%	124,525	1,676	549	228	92	55
Wellington	4,067	1,039	18%	18%	273,765	2,990	1,180	429	255	64
Marlborough	343	73	NA	1%	16,510	276	94	29		15*
Nelson	775	124	3%	2%	38,754	570	199	76	42	10
Christchurch & Canterbury	1,971	374	7%	7%	122,069	1,416	506	226	132	48
Dunedin	571	117	2%	2%	32,625	431	155	59	28	8
Queenstown	330	170	3%	3%	26,644	347	97	37		20*
Total	25,444	5,733	100%	100%	1,716,391	19,115	7,050	2,717	1,494	612

^{*}Cells with fewer than 5 events have been merged to protect venue confidentiality.



Incentive activities – Year ended June 2013

An incentive activity is defined as an activity occurring at a CAS venue that incentivises or rewards the invited event delegates for exceptional business achievement.

	Count of Incentive activities	Market share of activities	f incentive	Total delegate days		unt of incentive activities by event size (# delegates) for YE June 2013				
Region	YE June 2012	YE June 2013	YE June 2013	YE June 2013	10-30	31-60	61+			
Auckland	343	23%	26%	34,065	96	89	127			
Hamilton & Waikato	138	9%	11%	12,915	34	27	77			
Bay of Plenty	59	4%	5%	6,748	14	10	35			
Rotorua	47	6%	4%	5,832	16	12	15			
Taupo	38	5%	3%	3,040	15	15	9			
Hawkes Bay	22	4%	2%	1,656	5	8	9			
Manawatu	103	5%	8%	18,956	15	12	73			
Wellington	280	13%	21%	26,875	68	73	98			
Marlborough	41	NA	3%	4,314	12	14	12			
Nelson	55	5%	4%	8,484	21	13	20			
Christchurch & Canterbury	87	14%	7%	5,782	40	25	25			
Dunedin	25	5%	2%	2,651	9	8	8			
Queenstown	76	7%	6%	8,816	35	13	27			
Total	1,315	100%	100%	140,134	379	319	536			



Conferences/Conventions – Year ended June 2013

A conference or convention is described as a formal gathering of people at a CAS venue to discuss matters of shared interest involving multiple sessions and speakers.

	Count of conferences/conventions for YE June 2013			Market share of multi day conferences		Total single- day conference delegate days	Total multi- day conference delegate days	Count of conferences/conventions by event size (# of delegates) for YE June 2013					
Region	Single day	Two day	>2 days	YE June 2012	YE June 2013	YE June 2013	YE June 2013	10-30	31-60	61-100	101-200	201+	
Auckland	842	648	566	32%	33%	78,786	375,162	635	544	316	312	254	
Hamilton & Waikato	162	125	111	5%	6%	11,612	97,248	164	99	51	38	44	
Bay of Plenty	93	52	49	3%	3%	5,393	34,761	68	55	35	23	16	
Rotorua	130	114	171	10%	8%	10,275	86,401	134	107	73	67	41	
Taupo	93	98	103	7%	5%	7,085	50,922	112	71	51	39	23	
Hawkes Bay	36	23	24	1%	1%	2,069	9,380	31	31	15		10*	
Manawatu	118	157	92	6%	7%	9,873	62,972	145	82	51	43	38	
Wellington	477	469	353	18%	22%	38,403	191,626	404	349	176	223	94	
Marlborough	31	34	33	NA	2%	2,380	13,249	31	30	19	13	6	
Nelson	68	52	48	3%	3%	3,776	27,645	59	36	35	28	11	
Christchurch & Canterbury	76	61	89	6%	4%	4,893	53,729	77	46	48	44	8	
Dunedin	36	36	44	2%	2%	2,627	19,487	31	31	39		22*	
Queenstown	33	56	124	5%	5%	2,922	56,125	47	56	52	45	15	
Total	2,195	1,925	1,808	100%	100%	180,094	1,078,705	1,937	1,535	960	899	559	

^{*}Cells with fewer than 5 events have been merged to protect venue confidentiality.



Trade shows/exhibitions – Year ended June 2013

Trade shows and exhibitions are defined as a showcase of goods and services held for the benefit of a specific industry or interest group.

	Count of trade shows/exhibitions	Market share of the shows/exhibitions		Total tradeshows/ exhibitions delegate days		ade shows/o	s by event siz	ze (# of	
Region	YE June 2013	YE June 2012	YE June 2013	YE June 2013	10-30	31-60	61-100	101-200	201+
Auckland	359	27%	30%	384,242	52	75	62	62	113
Hamilton & Waikato	126	9%	11%	167,689	11	31	25	14	42
Bay of Plenty	53	7%	4%	54,800	6	18	9	6	16
Rotorua	82	4%	7%	34,746	31	22	11	7	12
Taupo	39	4%	3%	30,931	8	9		12*	
Hawkes Bay	36	5%	3%	5,641	8	6	8		12 *
Manawatu	84	8%	7%	94,980	8	14	18	14	26
Wellington	216	12%	18%	63,776	41	69	44	29	34
Marlborough	24	NA	2%	2,471	7		9*		7*
Nelson	39	5%	3%	27,637	8		9*	10	13
Christchurch & Canterbury	61	9%	5%	111,756	7	10	11	13	22
Dunedin	35	6%	3%	9,294	8	6	11		11*
Queenstown	31	4%	3%	13,589	8		13*		10*
Total	1,186	100%	100%	1,001,552	201	274	223	180	309

^{*}Cells with fewer than 5 events have been merged to protect venue confidentiality.



Special Occasion activities – Year ended June 2013

Special occasion activities are defined as a social gathering or celebration, for example a gala dinner, ball, graduation, cocktail party, birthday party, or wedding.

	Count of special occasion activities	Market share of occasion activiti		Total special occasion delegate days	Count of special occasion activities by event size (# of delegates) for YE June 2013					
Region	YE June 2013	YE June 2012	YE June 2013	YE June 2013	10-30	31-60	61-100	101-200	201+	
Auckland	3,486	34%	32%	625,221	553	720	877	774	606	
Hamilton & Waikato	1,253	12%	11%	151,837	195	292	400	249	136	
Bay of Plenty	603	6%	6%	71,075	97	148	205	109	67	
Rotorua	456	4%	4%	53,896	81	124	111	72	70	
Taupo	418	4%	4%	49,612	107	100	113	64	47	
Hawkes Bay	447	5%	4%	51,120	57	78	162	105	48	
Manawatu	828	8%	8%	118,503	146	181	228	171	112	
Wellington	1,441	12%	13%	209,598	300	311	345	320	200	
Marlborough	256	NA	2%	17,983	97	65	44	33	10	
Nelson	386	3%	4%	46,444	83	101	111	67	27	
Christchurch & Canterbury	842	7%	8%	100,670	138	245	223	153	88	
Dunedin	252	3%	2%	29,328	60	49	70	55	20	
Queenstown	279	2%	3%	26,977	71	79	66	44	20	
Total	10,948	100%	100%	1,552,263	1,985	2,493	2,954	2,215	1,450	