



Convention Delegate Survey Report

Year to December 2015

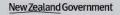


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Introduction

The Convention Research Programme (CRP) is a partnership between the Ministry of Business Innovation and Employment (MBIE) and regional Convention Bureaux to measure Business Event activity in New Zealand. Business events cover meetings, incentives, conferences, conventions and exhibitions. The CRP administers two Business Event surveys: the Convention Delegate Survey (CDS) and the Convention Activity Survey (CAS).

The CDS measures the spend of delegates attending multi-day conference/conventions in New Zealand (single day conference/conventions are excluded because they generate significantly less additional spend per delegate to the host region). The CDS collects profile and expenditure information from a sample of local, domestic and international delegates through an online survey completed after the conference/convention. Because it weights the sample responses to a national population weighing total, regional measures of delegate spend cannot be derived.

For the year ended December 2015 a total of 3,654 local, domestic and international convention/conference delegates from 97 events across New Zealand completed the CDS. These results were weighted to a total estimated population of 363,276 multiday convention/conference delegates which was taken from the CAS for the year ended December 2015. The international component of this total, 64,2015, is calculated from the international visitor arrival data (IVA) for the corresponding period with the remainder split between local and domestics delegates at the rate reported in CAS. The numbers of delegates in each category are:

- Local 132,185
- Domestic 166,876
- International, Australian 41,226
- International, Other–22,989

The CAS measures the number and type of Business Events occurring in New Zealand and provides regional summaries for participating regions. Further information on the CAS can be found on the Ministry's website.¹

The CRP regional Convention Bureaux members that are represented are: Auckland, Rotorua, Hawke's Bay, Taupo, Manawatu, Wellington, Nelson, Christchurch & Canterbury, Dunedin, Queenstown, Hamilton & Waikato, Bay of Plenty and Marlborough.

In addition to reporting on the results of the CDS, the report makes comparisons against the International Visitor Survey (IVS) and International Visitor Arrival (IVA) card data. These comparisons provide us with a sense of the relative value of international convention visitors compared to other visitors, while the IVA data provides further historical information on how the number of international convention visitors has changed over time.

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¹ http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/other-research-and-reports/convention-research

Key results

Multiday conventions continue to show their value in bringing visitors to regions and to New Zealand. The typical international convention delegate has a high nightly spend over a short period of time. Their nightly spend of \$350 (up 15 per cent on 2014) is almost double the average nightly spending of all international visitors. Domestic delegates from outside the host region spend on average \$509 per night (up 5 per cent on 2014).

Total spend by international convention visitors is up 11 per cent compared to 2014, driven by the increase in per person spend and also an increase in delegates (up 9 percent). However, overall spend is essential unchanged (down 1 per cent) as a result of 12 percent drop in total spend by local delegates and slight drop in spend of domestic delegates.

Further highlights for the year ending December 2015 are outlined below.

- International delegates (Australia and Other international) spent an average of 5.8 nights in New Zealand (4.0 nights in the event region and 1.8 nights elsewhere in New Zealand), spending an estimated \$350 per night. This per night spend is almost double the average spend per night for all international visitors according to the International Visitor Survey (IVS).
- Domestic delegates (New Zealand delegates from outside the event region) spent an average 2.9 nights in the event region, spending an estimated \$509 per night.
- On average, each international delegate spent \$2,019 in New Zealand. Spend per domestic delegate was \$1,477 while spend per local delegate was \$723.
- The average per person per night spend for all delegates who spent time away from home to attend conferences was \$439.
- Multi-day convention delegates spent an estimated \$472 million within New Zealand. Domestic delegates spent \$246 million (52 per cent of total delegate spend) on attending events outside their home region, local delegates spent \$96 million (20 per cent) inside their region and international visitors spent \$130 million (28 per cent) in New Zealand.
- Multi-day conventions generated an estimated 846,000 visitor nights in New Zealand. Around 86 per cent (731,000) of visitor nights were spent in the region that hosted the event (international and domestic delegates), and the remaining 14 per cent (116,000) were spent in other regions (international delegates only).

Section 1 of this report expands on the results presented above, while section 2 compares the current results with the IVS. Section 3 examines the changing pattern of international visitors to New Zealand whose main purpose of visit was to attend a conference or convention.

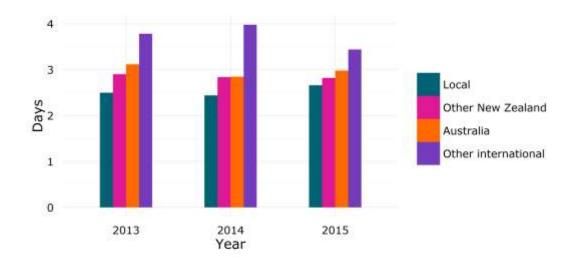
Section 1: Survey results year end December 2015

A total estimated population of 363,276 delegates (64,215 international and 299,061 domestic and local) attended multi day conventions and conferences held in New Zealand during the 2015 calendar year. The total number of delegates is down 1 per cent, compared to 2014. (Broken down by delegate origin there was a 9 per cent increase in international delegates but 3 per cent decrease in domestic and local delegates).

Delegate days

A total of 1,023,826 days at events were estimated to have occurred in the 2015 calendar year (up 1 per cent on 2014). Eighty per cent of the event days involved New Zealand delegates, with the remaining 20 percent of days associated with international attendees. Figure 1 provides a breakdown of average delegate days by origin and year.

Figure 1: Average length of event attendance by origin and year



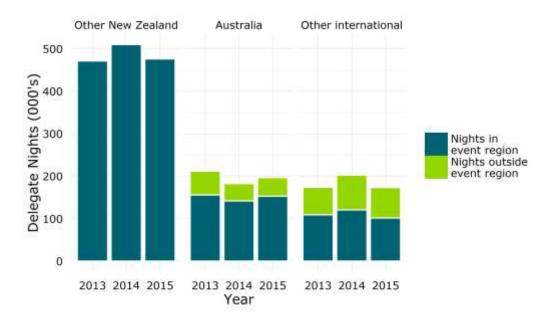
Both the CDS and CAS report delegate event days, however as they are based on different data sources (delegate reported event days for the CDS compared to venue reported delegate days for the CAS), the two estimates will not match.

Delegate nights

Conventions and conferences generated around 846,000 visitor nights in New Zealand of which 44 percent were generated by overseas delegates. Around 86 per cent of these nights were spent in the region that hosted the event. The remaining 14 per cent were spent outside the event region. Australian visitors spent 22 per cent of their nights outside the event region; for other international visitors this figure was 42 per cent (Figure 2).

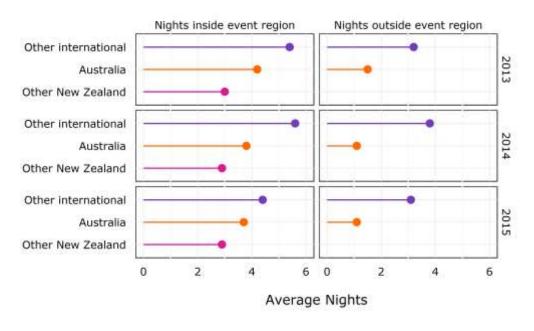
Local delegates have been excluded from the calculation of visitor nights as they attended conferences/conventions in the region that they live.

Figure 2: comparative plot of nights inside and outside event region among 2013, 2014 and 2015 by delegate origin



Domestic delegates each spent on average 2.9 nights in the event region. Australian delegates spent an average of 3.7 nights in the event region, and another 1.1 nights elsewhere within New Zealand. Non-Australian international delegates spent an average of 4.4 nights in the event region and another 3.1 nights elsewhere in New Zealand (Figure 3).

Figure 3: Average delegate nights inside and outside event region



On average domestic delegates (excluding local delegates) spent more nights in the event region than the number of days that they attend the event. A total of 58,165 additional nights are generated in the event region compared to the number of days at the events.

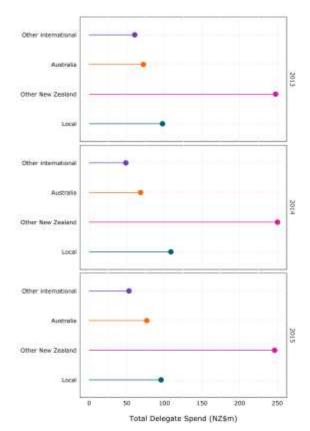
International delegates stay, on average, 0.8 more nights in the event region than days attending the event.

Delegate spend

The CDS measurement of delegate spend was developed to be consistent with spend measures from the International Visitor Survey (IVS), this allows consistent comparisons and an ability measure the relative value of different types of international visitors. These estimates of spend exclude expenditure associated other members of their travel party, for example spend associated with a non-conference-attending travel-partner. Spend estimates from both surveys exclude the cost of international airfares due to the use of foreign owned carriers and uncertainty around the proportion of spend that would return to New Zealand. Both spend estimates do include domestic flights.

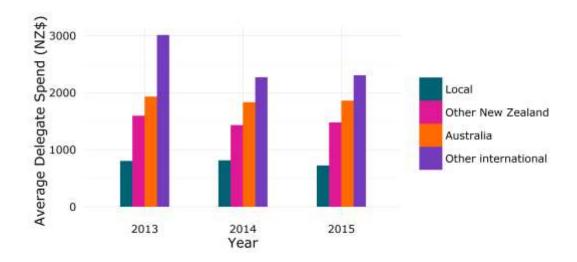
During 2015, convention/conference delegates spent an estimated \$472 million in the New Zealand economy, slightly down from the 2014 estimate of \$476 million, however, international spend was up. Domestic delegates accounted for \$246 million (52 per cent of the total amount), local delegates spent \$96 million (20 per cent) and international visitors spent a total of \$130 million (28 per cent). Of the international spend; \$77 million was generated from Australian visitors and \$53 million from other international visitors (Figure 4).





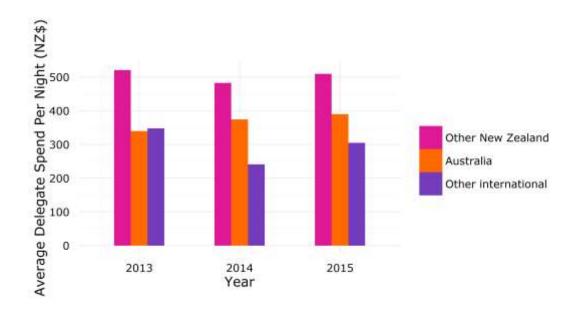
On average each international delegate spent a total of \$2,019 in New Zealand (\$1,859 by Australians and \$2,304 by other international delegates). Spend per domestic delegate was \$1,477 while spend per local delegate was \$723 (Figure 5).

Figure 5: Average delegate spend by origin



When spend is expressed on a per night basis international delegates spend less on average than other New Zealand delegates. This reversal in the level of spend is due to the greater number of nights international delegates stay in New Zealand (5.8 nights) compared to the number of nights other New Zealand delegates stay in the event region (2.9 nights). On average, domestic delegates spent \$509 per night in the event region, Australians spent \$390 per night in New Zealand and other international delegates spent \$305 per night in New Zealand (Figure 6). The average for all delegates who spent time away from home to attend conferences was \$439 per person per night.

Figure 6: Average per night spend by origin



Section 2: Comparison to the International Visitor Survey (IVS)

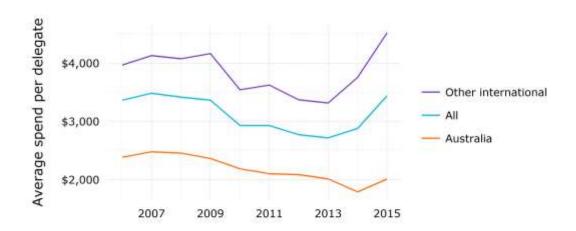
As detailed below, the typical convention delegate involves a short stay with a high nightly spend. This characteristic is clearly seen when comparing the CDS spend to the IVS where international delegates have almost double the average spend per night than the average visitor to New Zealand. Table 1 compares estimates of average spend per night from the IVS to the current CDS estimate.

Table 1: Comparison of per night delegate expenditure to IVS estimates

Source of spend (YE December 2015)	Average spend per night
CDS – international delegates (Australia and other internationals)	\$350
IVS – all visitors	\$189
IVS – business visitors	\$224
IVS – holiday visitors	\$246

The difference in length of stay is also notable with international delegates staying 5.8 nights in New Zealand while the average for all visitors is 18 nights and average for business visitors is 14 nights. The shorter length of stay of delegates' causes their average spend to be lower. The average international delegate spend of \$2,019 from the CDS is lower than the overall average spend reported from the IVS is \$3,400 for the year ending December 2015. Holiday visitors spend more on average (\$4,000), as do business visitors (\$3,200).

Figure 7: Average international visitor expenditure (IVS-derived)



Section 3: International travel

The IVA data² can also be used to report on changes to the international component of conferences and conventions over a longer time period than the CDS. The number of overseas arrivals to New Zealand for convention/conference purposes peaked in 2015 at 63,000, which is about 10 per cent above the 2014 number of 57,424.

Beneath the overall change we can see that the two markets reported in the CDS (International – Australia and Internationals – Other) have behaved quite differently since 2007 (Figure 8). From 2007 the mix includes a greater proportion of Australian convention/conference visitors to New Zealand as the number of other international visitors has declined. Comparing the year ended December 2015 to the previous year; arrivals from Australia were up 10 per cent while other international arrivals were up 8 per cent.

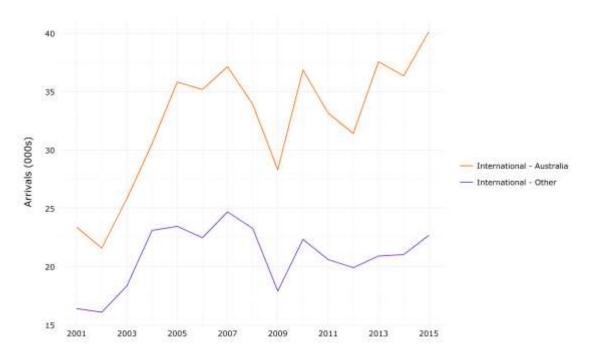


Figure 8: International conventions and conferences

Source: Statistics New Zealand, International Travel and Migration

The CAS also provides information on international delegates attending conferences however, as not all venues in regions input data, the IVA is considered a more accurate estimate of international convention delegates.

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² International arrival data is published under International Travel and Migration and is a monthly release providing information on the number of overseas visitors, New Zealand resident travellers, and permanent and long-term migrants entering or leaving New Zealand. Further information can be found on the Statistics New Zealand website:

http://www.stats.govt.nz/browse for stats/population/Migration/international-travel-and-migration-info-releases.aspx.

Section 4: Survey method

The CDS draws its respondents from people attending *multi-day* conferences and/or conventions in the 13 participating regions. A sample of 2,500 participants is required each year, and the Ministry expects that a mix of conference size, duration and locations will be included in the sample. All 13 regions should be represented.

This data was weighted so that the sample is indicative of the target delegate population and represents any sub groups that may exist among the delegates.

The detection of outliers and imputation of the data has been conducted for total spend by delegate origin, per person spend and per night spend. The CDS weighting process does not allow for information on spend per region to be calculated.

Delegates were asked to report how many days of the event they attended (all delegates); the number of nights they stayed in the city that hosted the convention/conference (domestic and international delegates) and how many nights they stayed in total in New Zealand, including the time spent at the convention/conference (only international delegates).

Delegate spend is calculated on a per person basis of the delegate attending the conference however, spend or costs relating to non-delegates are excluded (i.e. for accompanying persons or family) and is weighted to the population. The weighting process does not take into account the distribution of delegates across New Zealand, therefore, proving information on spend per region is not possible. International delegates are asked to report their spending in New Zealand, excluding international airfares as well as expenditure relating to buying or maintaining property. Domestic delegates are asked to report spend relating to visiting the city that is hosting the convention/conference, while local delegates are asked to provide the cost of attending the convention/conference. In all cases delegates are asked to include anything that others (e.g. employers) paid towards their costs.

CDS year ending December 2015 tables

Table 2: Visitor nights

		Total Nights				Nights in the event region				Outside the event region			
Origin	2013	2014	2015	Change (14-15)	2013	2014	2015	Change (14-15)	2013	2014	2015	Change (14-15)	
Local	N.A.	N.A.	N.A.		N.A.	N.A.	N.A.		N.A.	N.A.	N.A.		
Other New Zealand	471,556	510,160	476,128	-7%	471,556	510,160	476,128	-7%	N.A.	N.A.	N.A.		
Total international	386,475	385,050	370,356	-4%	265,054	262,560	254,406	-3%	121,421	122,490	115,950	-5%	
International - Australia	212,343	182,540	196,666	8%	155,947	141,881	152,817	8%	56,396	40,659	43,849	8%	
International - Other	174,132	202,510	173,690	-14%	109,107	120,679	101,589	-16%	65,025	81,831	72,101	-12%	
Total	858,031	895,210	846,484	-5%	736,610	772,720	730,534	-5%	121,421	122,490	115,950	-5%	

Table 3: Visitor nights per delegate

		Average nights				Average nights in the event region				Average nights outside the event region			
Origin	2013	2014	2015	Change (14- 15)	2013	2014	2015	Change (14-15)	2013	2014	2015	Change (14- 15)	
Local	N.A.	N.A.	N.A.		N.A.	N.A.	N.A.		N.A.	N.A.	N.A.		
Other New Zealand	3.0	2.9	2.9	0%	3	2.9	2.9	0%	0	0	0		
Total international	6.7	6.5	5.8	-12%	4.6	4.5	4.0	-11%	2.1	2.1	1.8	-13%	
International - Australia	5.7	4.9	4.8	-2%	4.2	3.8	3.7	-3%	1.5	1.1	1.1	0%	
International - Other	8.7	9.4	7.6	-19%	5.4	5.6	4.4	-21%	3.2	3.8	3.1	-18%	
All	4	3.8	3.7	-3%	3.5	3.3	3.2	-3%	0.6	0.5	0.5	0%	

Table 4: Delegates days at event

	Event days				Average event days				Number of Delegates			
Origin	2013	2014	2015	Change (14-15)	2013	2014	2015	Change (14-15)	2013	2014	2015	Change (14-15)
Local	303,491	325,917	351,457	8%	2.5	2.4	2.7	13%	121,549	133,577	132,185	-1%
Other New Zealand	450,536	496,079	470,439	-5%	2.9	2.8	2.8	0%	155,328	174,915	166,876	-5%
Total international	192,570	191,832	201,930	5%	3.3	3.3	3.1	-4%	57,504	58,840	64,215	9%
International - Australia	116,526	106,262	122,878	16%	3.1	2.8	3.0	7%	37,398	37,326	41,226	10%
International - Other	76,044	85,570	79,052	-8%	3.8	4	3.4	-15%	20,106	21,514	22,989	7%
All	946,596	1,013,826	1,023,826	1%	2.8	2.8	2.8	0%	334,381	367,332	363,276	-1%

Table 5: Visitor expenditure

	Total delegate spend				Spend per delegate				Spend per night			
Origin	2013	2014	2015	Change (14-15)	2013	2014	2015	Change (14-15)	2013	2014	2015	Change (14-15)
Local	97,547,559	108,598,417	95,594,091	-12%	803	813	723	-11%	N.A.	N.A.	N.A.	
Other New Zealand	247,825,777	250,390,998	246,459,227	-2%	1,595	1,432	1,477	3%	521	483	509	5%
Total international	132,658,612	117,157,423	129,620,301	11%	2,307	1,991	2,019	1%	343	304	350	15%
International - Australia	72,125,111	68,327,193	76,656,989	12%	1,929	1,831	1,859	2%	340	374	390	4%
International - Other	60,533,501	48,830,230	52,963,312	8%	3,011	2,270	2,304	1%	348	241	305	27%
All	478,031,948	476,146,839	471,673,619	-1%	1,430	1,296	1,298	0%	441	406	440	8%

Glossary and acronyms

Business Event Refers to meetings, incentives, conferences

and exhibitions.

CAS **Convention Activity Survey**

CDS Convention Delegate Survey

CRP Convention Research Programme (Comprises

the Convention Delegate Survey and the

Convention Activity Survey.

Delegate Those people who attended the conference

and includes registered delegates, exhibitors,

speakers and presenters

Delegate nights Number of nights spent in the event region

> for domestic visitors. For international visitors delegate nights include all nights

spent in New Zealand.

Domestic delegate A New Zealand resident that travels more

than 40 km one way to attend an event

Event days Number of days attended at the

conference/convention.

IVA International Visitor Arrivals as reported in

the ITM.

ITM International Travel and Migration data

reported by Statistics New Zealand

IVS International Visitor Survey. The IVS measures

> the travel patterns and expenditure of international visitors to New Zealand. Data includes expenditure, places visited,

activities/attractions, accommodation and

transport.

A New Zealand resident that travels less than Local delegate

40 km one way to attend an event

Total spend divided by the number of people Per person spend

in each person's party.

Appendix 2: CDS Questionnaire

After registering their emails, conference names and trip end dates above, we will send an email invitation to the Part 2, the actual questionnaire, two days following their trip end date.

Welcome to the Convention Delegate Survey!

This survey will ask you a series of questions about the trip on which you attended [conference/convention]. We will ask about:

- The duration of your trip;
- Where you spent your time;
- Who you travelled with; and
- The amount you spent over the course of your trip.

The data you submit will be aggregated and will not be identifiable. It will be used to analyse the role the conventions and incentives industry plays in New Zealand's tourism economy.

You can find our privacy policy [here – link to Malatest privacy policy]. If you have any questions please email... or call NZ toll-free....

Click here to begin the survey.

- 1. Did you attend the [year] [conference/convention] in [city]?
 - a. Yes \rightarrow go to 2.
 - b. No \rightarrow Exit to thank you page.

Conference/convention based on answers in registration.

- 2. Did you participate as a:
 - a. Registered delegate
 - b. Exhibitor
 - c. Presenter / Speaker
 - d. Other (please specify)

Radio buttons, pick multiple. Free text box for other

3. How many days did you personally attend the event?

Numeral box, number of days, maximum 10

- 4. Where did you last live for 12 months or more?
 - a. New Zealand \rightarrow *go to 15*
 - b. Other country (please specify) \rightarrow *go to 5*

Radio buttons – select one. Free text box for Other country

- 5. How many nights did you stay in total in [city] where the conference/convention was held?
 - a. Number of nights

Numeral box, maximum 30

- 6. How many nights did you stay in New Zealand in total, including the time spent at the conference/convention?
 - a. Number of nights

Numeral box, maximum 30

- 7. Please mark one response to show your main reason for going to New Zealand on this visit.
 - a. Holiday/Vacation
 - b. Visiting Friends/relatives
 - c. Business
 - d. Education
 - e. Conference/Convention
 - f. Other

Radio buttons, select one, free text box for other

We're now going to ask you about the cost of your recent visit to New Zealand.

- 8. Was your visit to New Zealand:
 - a. Alone \rightarrow **Go to 11**
 - b. With other people

Radio buttons, select one

- 9. Would it be easier for you to tell us about:
 - a. What the visit to New Zealand cost just for yourself → go to 11
 - b. What the visit cost for you and another person / people → go to 10

Radio buttons, select one

- 10. Please show the number of people whose cost you will be answering questions about:
 - a. Number aged 15+ including yourself
 - b. Number aged less than 15

Numeral boxes for each option, limit 10

- 11. We do NOT want to know about airfares to and from NZ. We want to find out about the rest of the cost for the visit to NZ. Which of these would be easier for you to do?
 - a. Put the total in on the bottom row of the table below and then leave the rest blank
 - b. Put in the amounts on each line of the table below and let the computer add them up.

Radio buttons, select one

- 12. Would it be easier for you to tell us the costs:
 - a. In New Zealand dollars
 - b. In your own currency (specify)?

Radio buttons, select one – if b is selected, user must choose from a drop down box of currencies

13. Cost of [your visit to NZ / the visit to NZ by you and those you are answering for – based on answer to question 10]

Please include: -

 [What you spent yourself / what you and those you are answering for – based on answer to question 10] spent on the visit to NZ • The cost of any registration fees paid for the conference/convention

AND

• anything that others paid towards the cost of that visit

Please remember to include anything paid for by a business or employer

Please do NOT include: -

- International airfares
- Cost of [buying or maintaining a house / flat / timeshare]

	Amount in [currency – based on selection in 12]
Costs paid for before you went to NZ	Numerals
Do not include any international airfares	
Costs paid for while you were in NZ:	Numerals
- amount paid by credit card	
- amount paid with Travel Card, Cash Card	Numerals
i.e. any card that you can load with money in the currency of the country you are visiting and can then use to pay for things and to draw out cash	
- amount paid by debit card	Numerals
- amount paid by travellers cheques	Numerals
- amount paid in cash	Numerals
- amount paid another way	Numerals

	More
If you need another row, press this button	
ii you need another row, press this batton	

Total should be auto-populated based on row entries

Total cost of [your visit to NZ / the visit to NZ by you and those you are answering for]	Numerals
Include costs paid before and during your visit to New Zealand	
NOT including any international airfares	
NOT including cost of [buying / maintaining house / flat / timeshare]	

Total should be auto-populated based on row entries

14. Do you have any comments about [region] as a conference/convention destination?

Free text box

Qs for Regional visitors to the conference/convention

- 15. Where in New Zealand do you currently live?
 - a. The same region as the conference/convention I attended → go to 24
 - b. Another region (please specify)

Radio buttons, drop down list for b with all regions – Northland, Auckland, Waikato, Bay of Plenty, Gisborne, Hawke's Bay, Taranaki, Manawatu-Wanganui, Wellington, Tasman, Nelson, Marlborough, West Coast, Canterbury, Otago, Southland

- 16. How many nights did you spend in total in [city] where the event was held?
 - a. Number of nights

Numeral box

- 17. Please mark one response to show your main reason for this visit to [city].
 - a. Holiday/Vacation
 - b. Visiting Friends/relatives
 - c. Business
 - d. Education
 - e. Conference/Convention
 - f. Other (specify)

Radio buttons, select one. Free text box for Other

We're now going to ask you about the cost of your recent visit to [city].

- 18. Was your visit to [city]:
 - a. Alone? \rightarrow Go to 21
 - b. With other people?

Radio buttons, select one

- 19. Would it be easier for you to tell us about:
 - a. What the visit to [city] cost just for yourself \rightarrow go to 21
 - b. What the visit cost for you and another person / people $\rightarrow go$ to 20

Radio buttons, select one

- 20. Please show the number of people whose cost you will be answering questions about:
 - a. Number aged 15+ including yourself
 - b. Number aged less than 15

Numeral box for both

- 21. We want to find out about the cost for this visit to [city], including any domestic airfares and conference/convention registration costs. Which of these would be easier for you to do?
 - a. Put the total in on the bottom row of the table below and then leave the rest blank

OR

b. Put in the amounts on each line of the table below and let the computer add them up.

Radio buttons, select one

- 22. Cost of [your visit to [city] / the visit to [city] by you and those you are answering for]

 Include: -
 - [What you spent yourself / what you and those you are answering for] spent on the visit to [city]Domestic airfares
 - Conference/convention registration fees

AND

• anything that others paid towards the cost of that visit

Remember to include anything paid for by a business or employer

	Amount
Costs paid for before you went to [city] Include any domestic airfares Include conference registration fees	Numerals
Costs paid for while you were in [city]:	
- amount paid by credit card	Numerals
- amount paid by debit card, EFT POS	Numerals
- amount paid in cash	Numerals
- amount paid another way	Numerals

	More
If you need another row, press this bu	tton 🖳

Total should be auto-populated based on row entries

Total cost of [your visit to [city] / the visit to [city] by you and those you are answering for] Include costs paid before and during your visit to [city]	Numerals
Include domestic airfares	
Include conference/convention registration fees	

Total should be auto-populated based on row entries

23. Do you have any comments about [region] as a conference/convention destination?

Free text box

Qs for Local residents attending the conference/convention

- 24. We want to find out about the cost for of your attendance at the conference/convention, including any registration costs. Which of these would be easier for you to do?
 - a. Put the total in on the bottom row of the table below and then
 - b. Leave the rest blank

OR

- c. Put in the amounts on each line of the table below and let the computer add them up.
- 25. Cost of attendance at the conference/convention

Include: -

Conference/convention registration fees

AND

 anything that others paid towards the cost of your attendance at the conference/convention

Remember to include anything paid for by a business or employer

	Amount
Costs paid for before you went to the conference/convention	Numerals
Include any conference registration fees	
Costs paid for while you were at the conference/convention	Numerals
- amount paid by credit card	
- amount paid by debit card, EFT POS	Numerals
- amount paid in cash	Numerals
- amount paid another way	Numerals

If you need another row, press this button

More

Total should be auto-populated based on row entries

Total cost of attending the conference/convention	Numerals
Include costs paid before and during the conference/convention	
Include conference/convention registration fees	

Total should be auto-populated based on row entries

26. Do you have any comments?

Free text box

Thank you for participating in the CDS – we appreciate your time.