

Convention Activity Survey YE March 2013 report

Prepared July 2013



**Ministry of Business,
Innovation & Employment**

Contents

Introduction	3
CAS participants	3
Convention Bureaux.....	3
Qualifying CAS Venues	4
Overview of event activity for year ended March 2013	6
Trends in the number of events reported since YE June 2010	7
Trends in larger events (>100 delegates).....	9
Convention/Conference activity for year ended March 2013	10
Trends in multi-day conferences	11
Appendix 1– Regional results.....	13

Overview

A total of 4.4 million delegates attended 51,000 events for around 5.4 million delegate days in the year ended March 2013. This compared to 4.2 million delegates, 54,000 events, and 5.4 million delegate days in the year ended March 2012. Around 34 per cent of multi day events and 32 per cent of one day events were held in Auckland in the year ended March 2013.

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/showgrounds:** 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 Bureau is asked to identify the entire population of qualifying CAS venues in its area. In the YE March 2013, event activity was recorded or estimated for a total of 347 venues in the 13 regions.

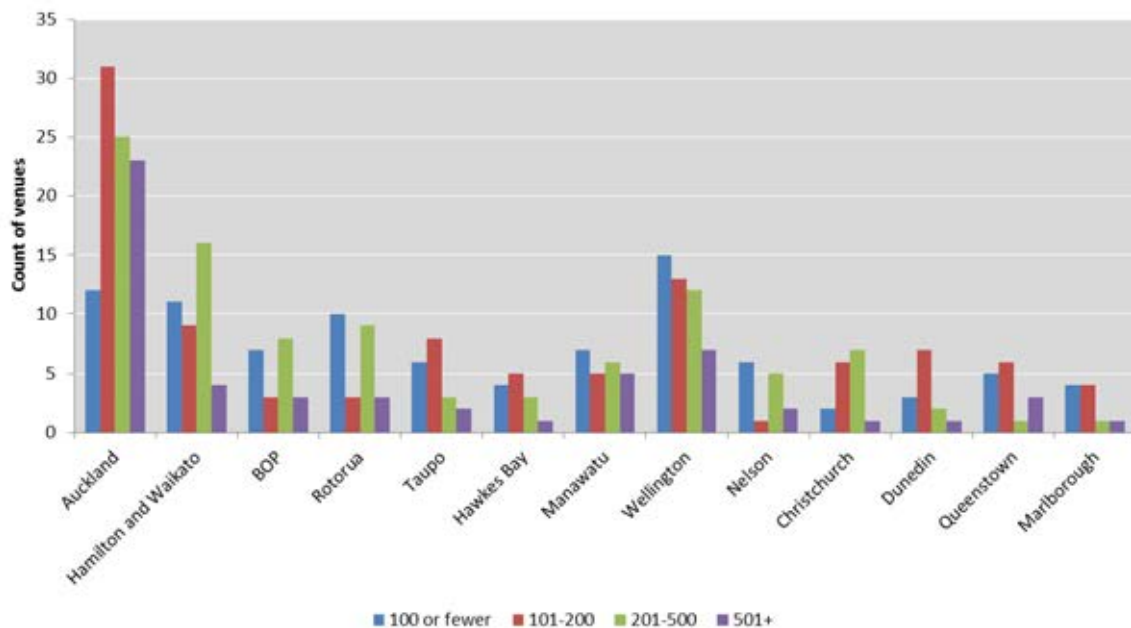
In the March 2013 quarter, 138 venues (59% of recorded capacity) submitted data for at least one of the three months. The number of venues actively contributing data to the CAS has remained relatively constant over the last two years, ranging between 135 and 147 venues each quarter.

Table 1 Comparing venue participation rates for 2012 Q4 and 2013 Q1

Region	Venues submitting as % of those identified in region		Capacity of venues submitting as % of capacity in region	
	2012Q4	2013Q1	2012Q4	2013Q1
Auckland	26%	30%	35%	50%
Hamilton and Waikato	30%	28%	42%	75%
BOP	38%	38%	26%	26%
Rotorua	40%	36%	83%	78%
Taupo	32%	32%	33%	33%
Hawkes Bay	46%	46%	72%	72%
Manawatu	30%	30%	31%	40%
Wellington	54%	55%	85%	85%
Marlborough	50%	50%	74%	72%
Nelson	29%	36%	57%	58%
Christchurch	69%	81%	83%	90%
Dunedin	69%	54%	77%	65%
Queenstown	73%	53%	87%	36%
Total	40%	40%	51%	60%

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 Q1)



Overview of event activity for year ended March 2013

An estimated total of 51,000 events occurred in the 13 regions in the year ended March 2013. Sixty per cent of these were meetings/seminars. Table 2 shows about 39% of the delegate days for the year ended March 2013 were in Auckland.

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

Region	# of single day Events	# of multi-day Events	# of Delegates (all events)	Delegate days	
				Count	Change in delegate days market share from March 2012
Auckland	13,007	3,763	1,762,924	2,134,336	-3%
Hamilton & Waikato*	4,925	906	468,255	556,495	NA
Bay of Plenty*	2,273	387	196,567	231,992	NA
Rotorua	1,689	693	173,056	263,304	-1%
Taupo	1,406	510	133,477	187,854	No change
Hawkes Bay	1,483	163	99,974	117,567	No change
Manawatu	3,322	708	356,266	435,484	No change
Wellington	6,147	2,064	611,090	727,880	-2%
Marlborough**	515	137	35,663	46,124	NA
Nelson	1,355	292	123,288	151,169	No change
Christchurch & Canterbury	2,679	637	272,927	351,016	No change
Dunedin	938	229	67,077	86,723	No change
Queenstown	700	430	80,952	141,064	No change
Total	40,440	10,918	4,381,516	5,431,007	

*Hamilton & Waikato, and Bay of Plenty joined the programme in July 2011 so only three quarters of activity are recorded in the year ended March 2012.

**Marlborough joined the programme in July 2012, so only three quarters of activity are recorded.

There were over 5.4 million delegate days in the year ended March 2013. Table 3 shows the split in delegate days for different event types for the last four quarters. The variation by season can clearly be seen.

Table 3 Delegate days by event type for each quarter during YE March 2013

Event type	2012Q2	2012Q3	2012Q4	2013Q1
Meeting/seminar	494,575	451,140	455,079	342,916
Incentive activity	15,417	21,005	46,522	35,842
Conference or convention	325,455	409,359	308,214	256,258
Trade show/exhibition	239,012	265,495	220,982	194,663
Special occasion	248,139	323,504	515,173	345,648
Total	1,322,598	1,470,503	1,545,970	1,175,326

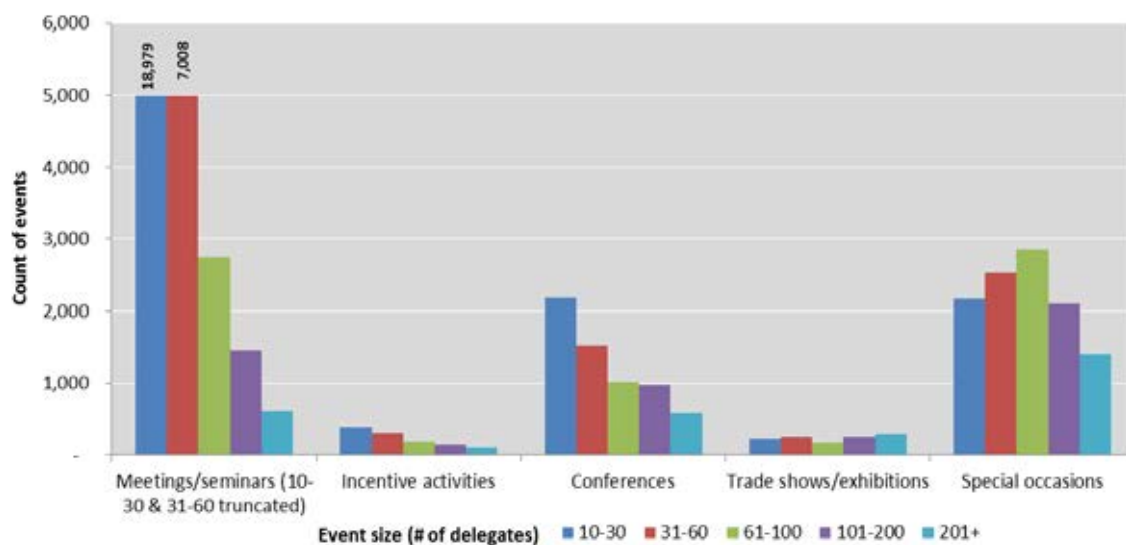
Table 4 shows that most events in the year ended March 2013 were commissioned by businesses, with associations and government entities coming a distant second and third.

Table 4 Type of organisation commissioning an event

Events run for...	2012Q2	2012Q3	2012Q4	2013Q1
Associations	2,535	2,270	2,366	1,413
Business	6,992	6,892	6,491	4,810
Government	1,682	1,398	1,663	1,204
Education	1,159	1,549	1,014	885
Personal	1,043	1,189	1,445	1,725
Other/don't know	NA	499	615	504
Total	13,411	13,797	13,594	10,541

With the exception of special occasions, small events with fewer than 60 delegates attending dominate MICE activity in the year ended March 2013 (refer Figure 2). Small meetings/seminar formed 52% of all events, with about ~19,000 meetings having 10-30 delegates and ~7,000 meetings with 31-60 delegates. Smaller conferences also dominated conference activity, with 35% having 10-30 delegates and a further 24% having 31-60 delegates.

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



Trends in the number of events reported since YE June 2010

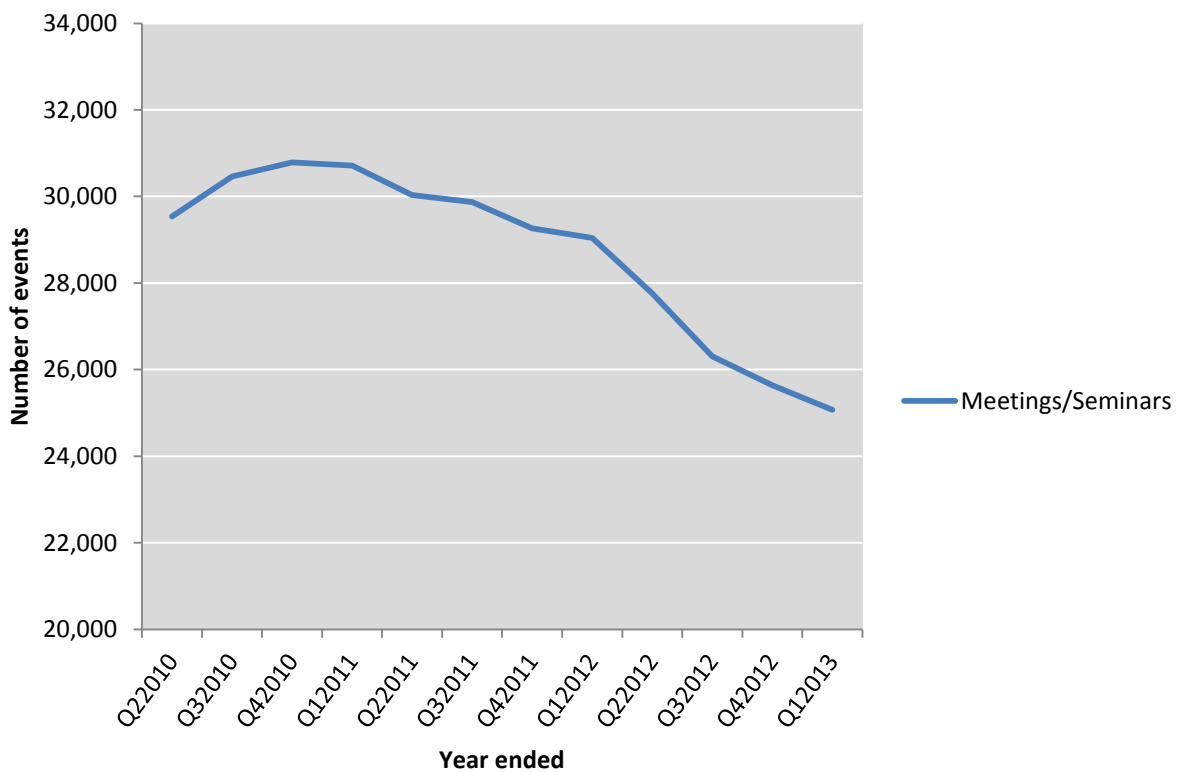
Since June 2010 quarter, it has been possible to construct rolling annual totals for different variables. Figure 3 shows variation or trend for the number of events (meetings, incentive activities, conferences, trade shows/exhibitions, and special occasions) reported for each year ended quarter from June 2010 to March 2013. Note that Bay of Plenty, Hamilton and Waikato and Marlborough

have been excluded, given that they have not been contributing data for the whole period shown in the chart.¹

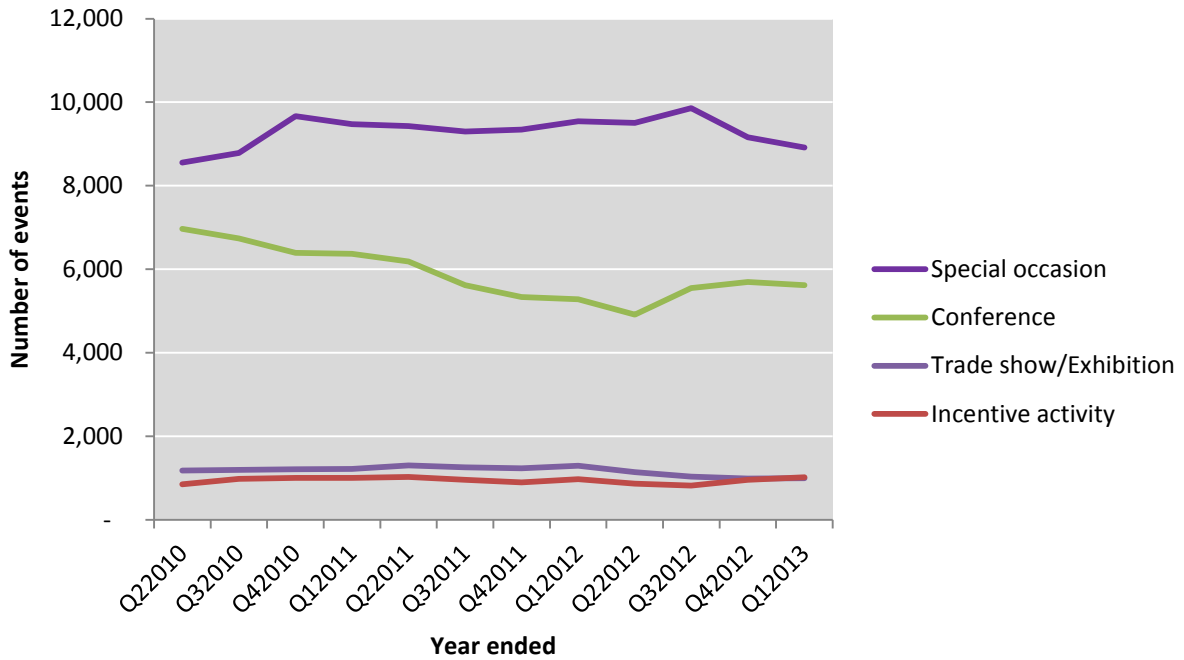
As can be seen, the number of meetings/seminars reported has been falling off since peaking in the year ended December 2010. Special occasions have fallen off in the years ended December 2012 and March 2013 since peaking in the year ended September 2012.

Conference/convention activity for the year ended March 2013 has fallen slightly from the year ended December 2012 but is still higher than any time since September 2011.

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



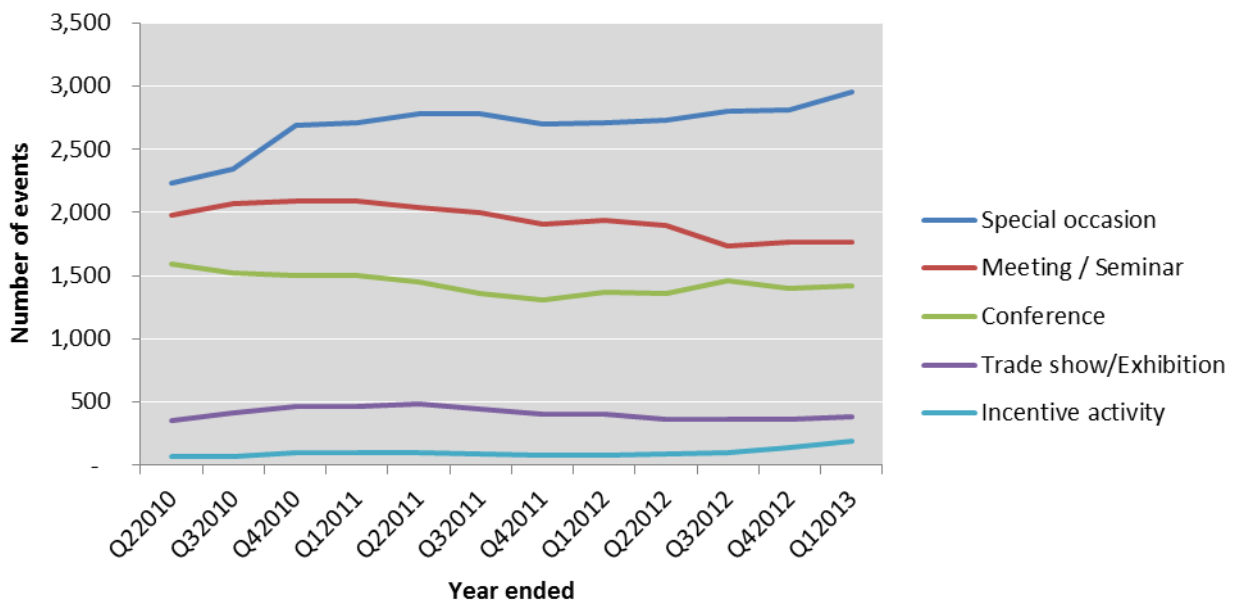
¹ Figure 3 in the YE December 2012 report mistakenly included these despite the text saying it did not. Hence the graph is quite different from Q2 2011 onward.



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, with the number of larger meetings/seminars declining. Other large conferences, incentive activities and trade shows/exhibitions have been reporting similar number of events over the time period. Note that this trend analysis excludes Hamilton and 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 Mar 2013 (excludes Hamilton & Waikato, Bay of Plenty and Marlborough)



Convention/Conference activity for year ended March 2013

Table 5 shows that about one-half (2,632) of the conferences held in the year ended March 2013 were multi day events, with most of these (1,972) being two days in duration.

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

Region	Duration of Conference			Market share of multi day conferences	Conference Delegate days		Market share of Multi day conference delegate days
	One day	Two days	>2 days		Single day	Multi-day	
Auckland	966	719	572	35%	84,257	379,216	35%
Hamilton and Waikato	184	115	111	6%	11,831	98,275	9%
BOP	143	46	43	2%	7,424	33,262	3%
Rotorua	110	109	177	8%	9,536	98,827	9%
Taupo	111	93	109	5%	9,067	53,387	5%
Hawkes Bay	44	25	22	1%	2,754	10,454	1%
Manawatu	152	143	92	6%	11,189	60,943	6%
Wellington	562	497	347	23%	40,703	198,736	18%
Nelson	63	50	51	3%	3,850	29,541	3%
Christchurch & Canterbury	60	53	98	4%	4,246	59,175	5%
Dunedin	40	37	43	2%	2,656	19,670	2%
Queenstown	36	55	118	5%	2,772	55,051	5%
Marlborough	24	31	24	NA	1,492	10,090	NA
Total	2,495	1,972	1808	100%	191,777	1,106,628	100%

Auckland hosted the greatest proportion (35%) of multi-day conferences, with 35% of the delegate days; followed by Wellington with 23% of the multi-day conferences and 18% of the multi-day conference delegate days.

Of the multi-day conference delegates, 46% were reported to be from the local region, with another 46% travelling from another region to the conference in the year ended March 2013.

Table 6 indicates 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. As a result, the delegate numbers by origin do not add up to the total number of delegates. However, venues where the difference is more than 20% are contacted in order to check.

For the year ended March 2013, Statistics New Zealand² reported that a total of 54,160 international visitors reported that their main reason for visiting New Zealand was to attend a convention/conference (either single or multi-day). Of these, 61% (33,248) were Australian. This was

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

up from the previous year ended March 2012, when 50,744 international visitors stated their main reason for visiting New Zealand was to attend a convention/conference, and 60% were from Australia.

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

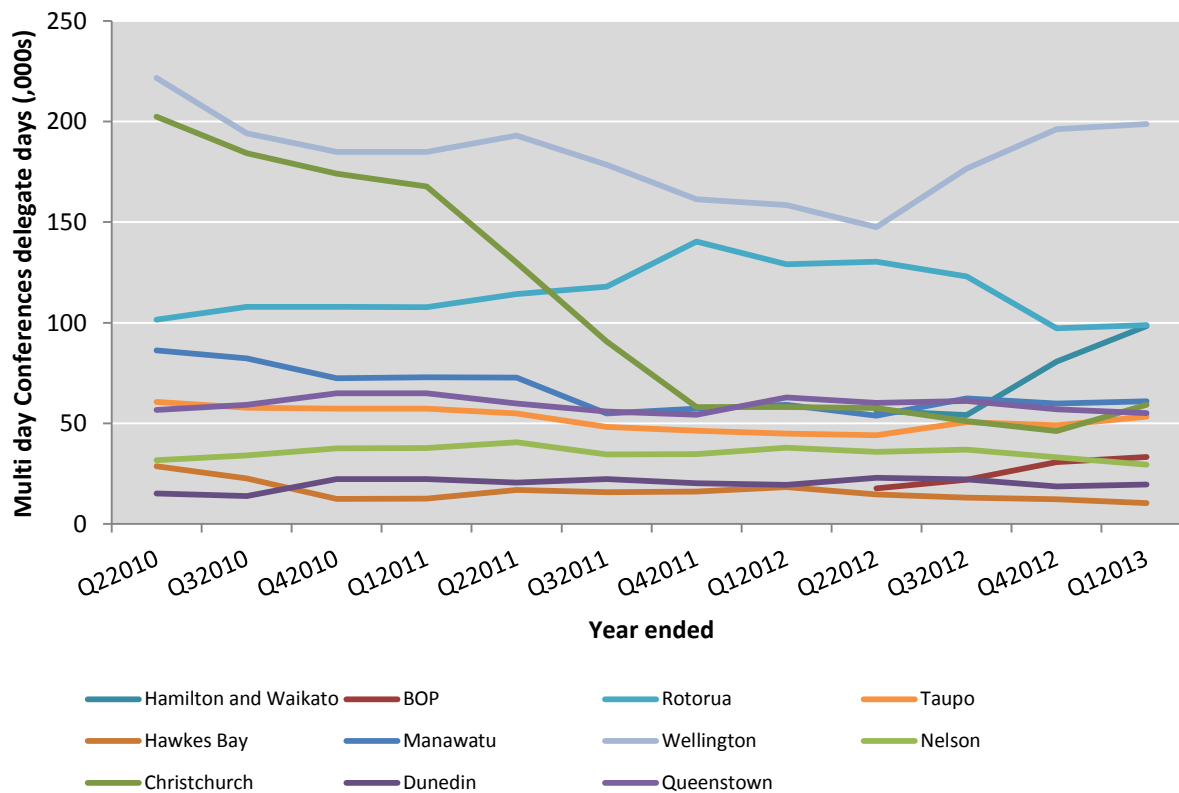
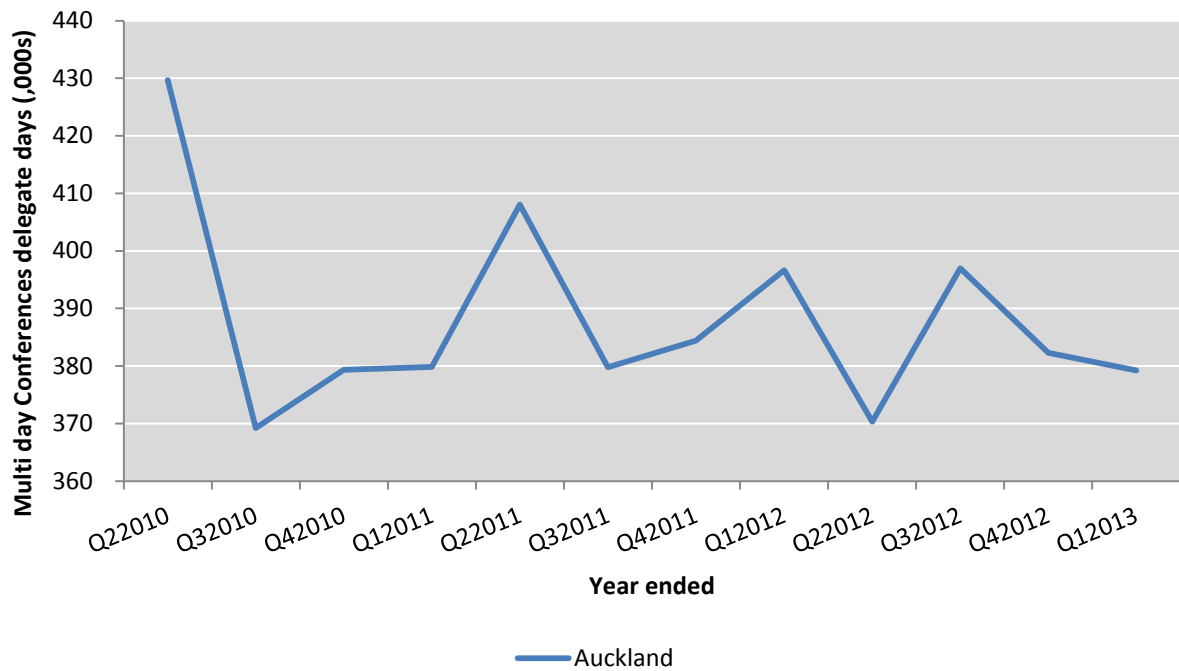
Region	Local	Regional	Australian	International
Auckland	83,623	47,236	6,751	4,326
Hamilton and Waikato	14,567	10,274	564	1,062
BOP	7,430	3,814	297	368
Rotorua	4,179	23,998	2,861	743
Taupo	2,302	14,032	943	266
Hawkes Bay	1,650	1,367	152	8
Manawatu	15,147	6,213	681	921
Wellington	31,831	40,471	1,487	1,400
Marlborough	1,540	1,661	483	56
Nelson	3,124	5,737	389	351
Christchurch & Canterbury	7,214	9,759	1,150	565
Dunedin	2,207	4,292	378	126
Queenstown	2,617	10,744	3,352	700
Total number of delegates	177,432	179,598	19,489	10,892

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

Trends in multi-day conferences

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

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



Bay of Plenty and Hamilton and Waikato joined the Convention Research Programme in the September 2011 quarter, hence there are only three quarter-year-ends included.

Appendix 1– Regional results

This appendix includes reports on regional level activity for the year ended March 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 March 2013

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

Region	Count of meetings for YE Mar 2013		Market share of multi day meetings		Total delegate days	Count of meetings/seminars by event size (# of delegates) for YE Mar 2013				
	Single day	Multi-day	YE Mar 2012	YE Mar 2013	YE Mar 2013	10-30	31-60	61-100	101-200	201+
Auckland	7,804	2,215	47%	38%	734,375	5,669	2,401	962	597	337
Hamilton and Waikato	3,242	568	NA	10%	161,395	2,547	805	310	148	32
BOP	1,383	238	NA	4%	76,904	1,032	375	136	79	20
Rotorua	1,087	310	4%	5%	66,831	898	325	112	42	17
Taupo	805	209	4%	4%	45,333	680	225	78	28	6
Hawkes Bay	899	98	2%	2%	40,209	659	202	84	43	10
Manawatu	2,190	384	6%	7%	126,356	1,673	533	228	96	49
Wellington	3,903	992	21%	17%	271,381	2,905	1,120	417	222	77
Marlborough	267	61	NA	NA	13,421	208	80	25	12*	
Nelson	806	140	3%	2%	42,677	590	215	86	39	11
Christchurch & Canterbury	1,755	374	8%	6%	103,945	1,335	450	201	99	29
Dunedin	587	109	3%	2%	30,663	424	167	68	28	6
Queenstown	370	166	3%	3%	30,222	358	112	42	26*	
Total	25,098	5,864	100%	100%	1,743,709	18,979	7,008	2,750	1,451	603

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

Incentive activities – Year ended March 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.

Region	Count of Incentive activities	Market share of incentive activities		Total delegate days	Count of incentive activities by event size (# of delegates) for YE Mar 2013		
	YE Mar 2013	YE Mar 2012	YE Mar 2013	YE Mar 2013	10-30	31-60	61+
Auckland	340	28%	29%	31,909	119	87	108
Hamilton and Waikato	114	NA	10%	10,527	25	30	58
BOP	45	NA	4%	4,826	10	7	27
Rotorua	35	7%	3%	6,359	9	7	15
Taupo	37	6%	3%	3,241	15	16	8
Hawkes Bay	33	4%	3%	2,022	9	14	9
Manawatu	85	7%	7%	13,940	17	11	53
Wellington	254	17%	22%	20,644	70	70	73
Marlborough	35	NA	NA	3,807	11	11	9
Nelson	55	4%	5%	4,690	25	10	20
Christchurch & Canterbury	83	15%	7%	5,545	37	25	25
Dunedin	28	6%	2%	2,080	12	10	6
Queenstown	72	7%	6%	9,195	33	11	28
Total	1,215	100%	100%	118,786	392	311	439

Conferences/Conventions – Year ended March 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.

Region	Count of conferences/conventions for YE Mar 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 Mar 2013				
	Single day	Two day	>2 days	YE Mar 2012	YE Mar 2013	YE Mar 2013	YE Mar 2013	10-30	31-60	61-100	101-200	201+
Auckland	966	719	572	34%	35%	84,257	379,216	773	552	327	358	256
Hamilton and Waikato	184	115	111	NA	6%	11,831	98,275	167	104	62	41	42
BOP	143	46	43	NA	2%	7,424	33,262	100	61	38	23	14
Rotorua	110	109	177	11%	8%	9,536	98,827	112	101	79	67	46
Taupo	111	93	109	7%	5%	9,067	53,387	109	70	64	43	28
Hawkes Bay	44	25	22	2%	1%	2,754	10,454	36	27	16	16*	
Manawatu	152	143	92	8%	6%	11,189	60,943	167	78	48	45	38
Wellington	562	497	347	20%	23%	40,703	198,736	492	341	189	255	98
Marlborough	24	31	24	NA	NA	1,492	10,090	26	26	16	12*	
Nelson	63	50	51	4%	3%	3,850	29,541	53	36	34	29	15
Christchurch & Canterbury	60	53	98	6%	4%	4,246	59,175	70	42	49	35	13
Dunedin	40	37	43	2%	2%	2,656	19,670	34	31	36	18	6
Queenstown	36	55	118	6%	5%	2,772	55,051	47	50	56	42	15
Total	2,495	1,972	1808	100%	100%	191,777	1,106,628	2,185	1,519	1,014	978	577

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

Trade shows/exhibitions – Year ended March 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.

Region	Count of trade shows/exhibitions for YE Mar 2013	Market share of trade shows/exhibitions		Total tradeshow/exhibitions delegate days	Count of trade shows/exhibitions by event size (# of delegates) for YE Mar 2013				
		YE Mar 2012	YE Mar 2013		YE Mar 2013	10-30	31-60	61-100	101-200
Auckland	336	35%	28%	360,237	50	58	76	52	111
Hamilton and Waikato	125	NA	10%	130,842	16	27	28	16	34
BOP	71	NA	6%	40,401	10	17	16	9	19
Rotorua	71	5%	6%	26,724	28	18	10	5	10
Taupo	50	4%	4%	35,338	11	14	6	5	12
Hawkes Bay	45	6%	4%	4,675	7	8	17	10*	
Manawatu	92	9%	8%	91,104	11	12	22	12	30
Wellington	182	16%	15%	70,534	43	53	36	23	28
Marlborough	15	NA	NA	1,553	12*		5*		
Nelson	54	5%	5%	31,159	10	6	15*		21
Christchurch & Canterbury	73	10%	6%	104,439	10	15	15	16	20
Dunedin	51	5%	4%	5,231	15	14	13	5	5
Queenstown	41	3%	3%	17,915	16	6	8	5	7
Total	1,208	100%	100%	920,151	234	253	252	167	302

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

Special Occasion activities – Year ended March 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.

Region	Count of special occasion activities for YE Mar 2013	Market share of special occasion activities		Total special occasion delegate days	Count of special occasion activities by event size (# of delegates) for YE Mar 2013				
		YE Mar 2012	YE Mar 2013		YE Mar 2013	10-30	31-60	61-100	101-200
Auckland	3,592	42%	33%	588,325	680	753	846	718	615
Hamilton and Waikato	1,229	NA	11%	135,361	207	310	387	228	121
BOP	589	NA	5%	65,377	100	161	192	103	60
Rotorua	462	4%	4%	56,147	87	114	113	78	74
Taupo	442	5%	4%	48,279	112	102	123	79	45
Hawkes Bay	482	6%	4%	50,130	93	86	163	95	47
Manawatu	834	9%	8%	108,127	160	192	229	160	105
Wellington	1,463	15%	14%	211,028	314	330	321	300	203
Marlborough	202	NA	NA	13,086	73	51	35	26	7
Nelson	392	4%	4%	39,077	86	97	102	77	30
Christchurch & Canterbury	725	8%	7%	70,429	117	219	193	144	57
Dunedin	264	4%	2%	24,694	62	55	76	58	14
Queenstown	260	3%	2%	22,405	73	70	64	37	16
Total	10,937	100%	100%	1,432,465	2,164	2,540	2,845	2,102	1,393