



**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HĪKINA WHAKATUTUKI

**SECTOR
PERFORMANCE**



Convention Delegate Survey Report

Year to December 2014

Key results

The key results of the Convention Delegate Survey for persons who attended multi-day conferences/conventions in New Zealand in the year ending December 2014 are outlined below.

- International delegates (Australia and Other international) spent an average of 6.5 nights in New Zealand (4.5 nights in the event region and 2.1 nights elsewhere in New Zealand), spending an estimated \$304 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 \$483 per night.
- On average, each international delegate spent \$1,991 in New Zealand. This is less than the average spend per international visitor of \$2,900 according by to the IVS, but this is not unexpected as international delegates only spend 6.5 nights in New Zealand while the average for all visitors is 20 nights. Spend per domestic delegate was \$1,432 while spend per local delegate was \$813.
- Multi-day convention delegates spent an estimated \$476 million within New Zealand. Domestic delegates spent \$250 million (53 per cent of total delegate spend) on attending events outside their home region, local delegates spent \$109 million (23 per cent) inside their region and international visitors spent \$117 million (25 per cent) in New Zealand.
- Multi-day conventions generated an estimated 895,000 visitor nights in New Zealand. 86 per cent (773,000) of visitor nights were spent in the region that hosted the event (international and domestic delegates), and the remaining 14 per cent (122,000) were spent in other regions (international delegates only).

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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 Event¹ activity in New Zealand. 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). 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 2014 a total of 2,799 local, domestic and international convention/conference delegates from 80 events across New Zealand completed the CDS. These results were weighted to a total estimated population of 367,332 delegates, split across the following delegate origin categories²:

- Local – 133,577
- Domestic – 174,915
- Australian – 37,326
- Other international – 21,514

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.³

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

Section 1 of this report expands on the results presented in the Key results. Section 2 compares the current results with the International Visitor Survey (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 4 provides an overview of the survey method.

¹ Business events cover meetings, incentives, conferences, conventions and exhibitions.

² The population totals for New Zealand delegates are taken from the CAS for the year ended December 2014, while the international totals represent the number of short term arrivals to New Zealand with a reported main purpose of visit being to attend a conference/convention for the corresponding period.

³ <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/other-research-and-reports/convention-research>

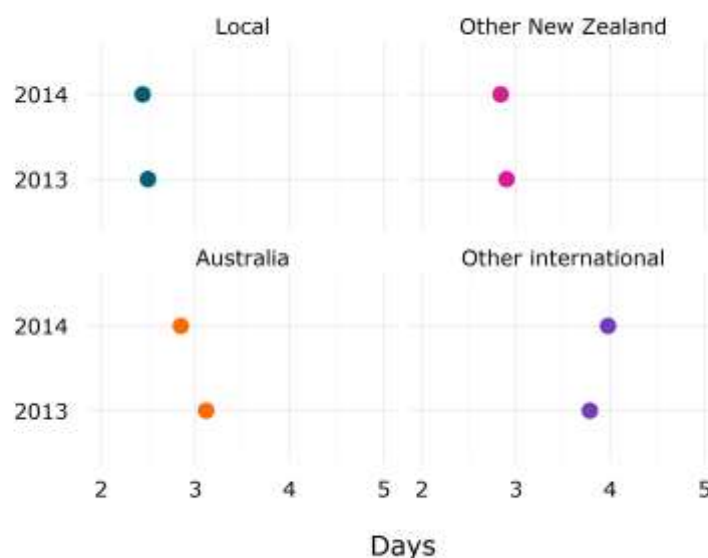
Section 1: Survey results year end December 2014

A total estimated population of 367,332 delegates (58,840 international and 308,492 domestic and local) attended conventions and conferences held in New Zealand during the 2014 calendar year⁴. Total delegate numbers are up 10 percent, compared to 2013. This increase is largely driven by the 11 per cent increase in domestic and local delegates.

Delegate event days and nights

A total of 1,013,826 event days were estimated to have occurred in the 2014 calendar year⁵ (up 7 per cent on 2013). Eighty one per cent of the event days involved New Zealand delegates, with the remaining 19 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



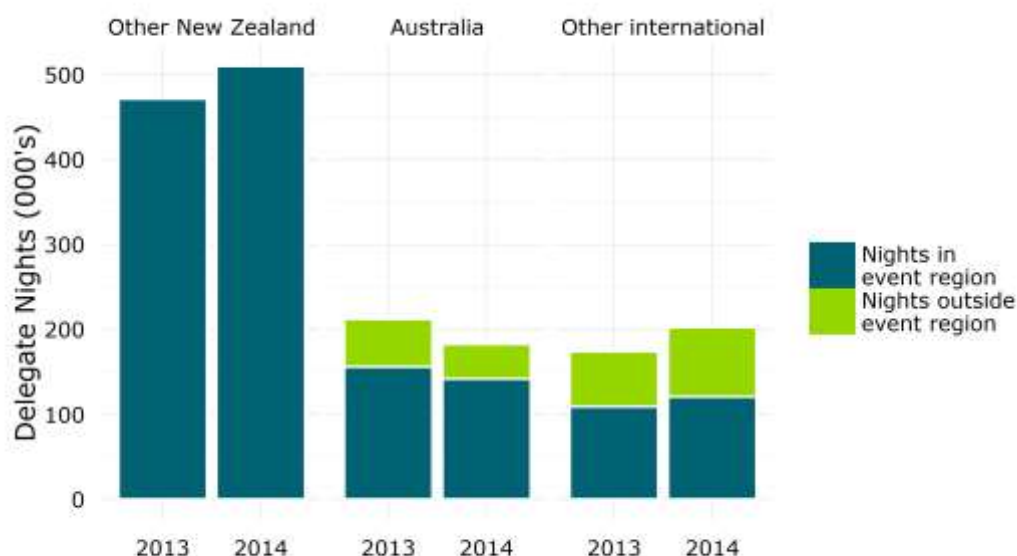
Conventions and conferences generated around 895,000 visitor nights in New Zealand of which 43 percent were generated by overseas delegates⁶. Around 86 per cent of these nights were spent in the region that hosted the event. The remaining 16 per cent were spent outside the event region. Australian visitors spent 22 per cent of their nights outside the event region; for other international visitors this figure was 40 per cent (Figure 2).

⁴ Section 4 provides information on the source of the population data.

⁵ 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 vs. venue reported delegate days for the CAS), the two estimates will not match.

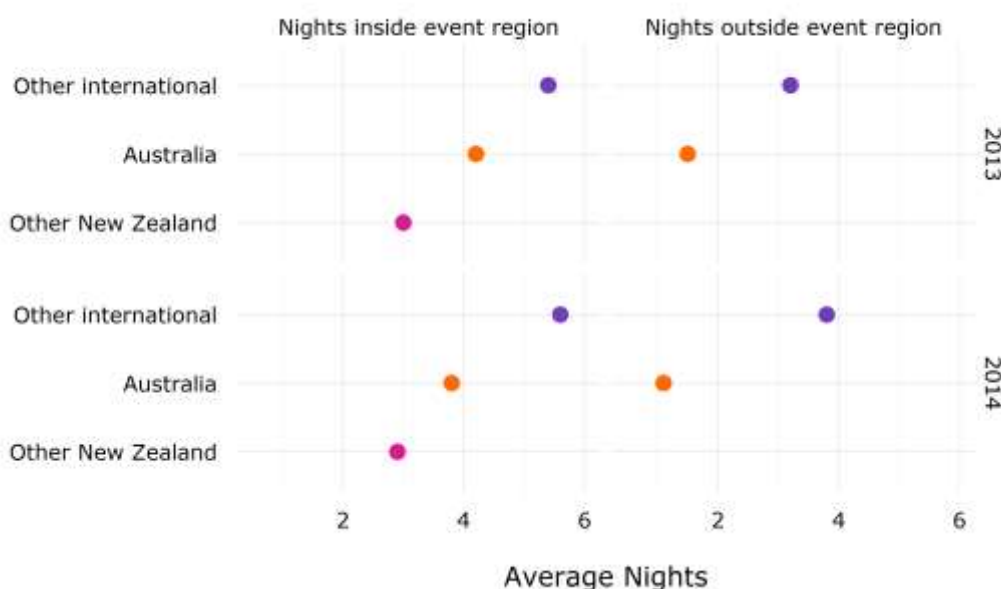
⁶ Local delegates have been excluded from the calculation of visitor nights as they attended conferences/conventions in the region that they live.

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



Domestic delegates each spent on average 2.9 nights in the event region. Australian delegates spent an average of 3.8 nights in the event region, and another 1.1 nights elsewhere within New Zealand. Non-Australian international delegates spent an average of 5.6 nights in the event region and another 3.8 nights elsewhere in New Zealand (Figure 3).

Figure 3: Average delegate nights inside and outside event region

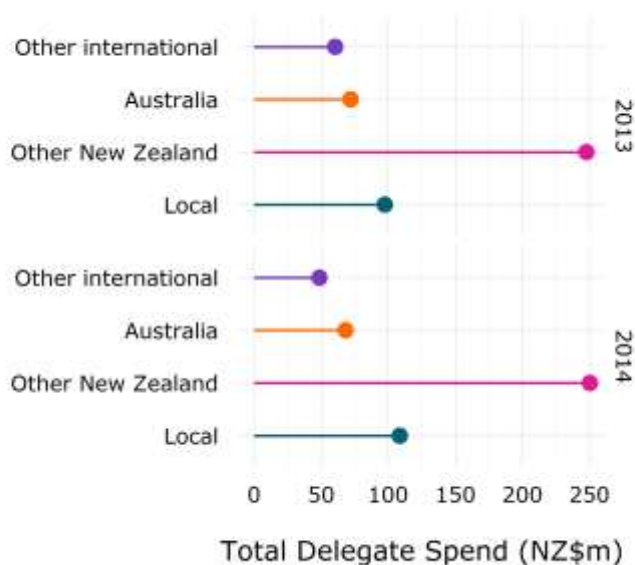


On average non-local delegates spent more nights in the event region than the number of days that they attend the event. A total of 84,810 additional nights are generated in the event region compared to the number of days at the events. International delegates stay, on average, 1.2 more nights in the event region than days attending the event.

Delegate spend

Convention/conference delegates spent an estimated \$476 million in the New Zealand economy during 2014, essentially unchanged from 2013⁷. Domestic delegates accounted for \$250 million (53 per cent of the total amount), local delegates spent \$109 million (23 per cent) and international visitors spent a total of \$117 million (25 per cent). Of the international spend; \$68 million was generated from Australian visitors and \$48 million from other international visitors (Figure 4).

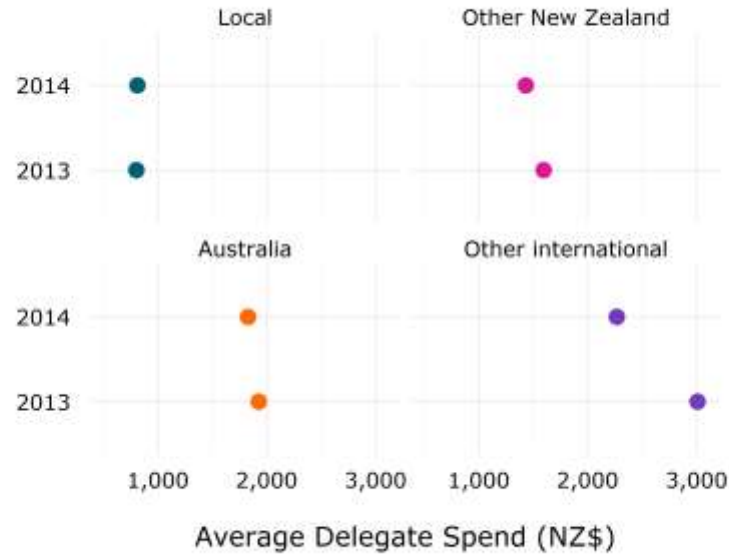
Figure 4: Total delegate spend by origin



On average each international delegate spent a total of \$1,991 in New Zealand (\$1,831 by Australians and \$2,270 by other international delegates). Spend per domestic delegate was \$1,432 while spend per local delegate was \$ 813 (Figure 5).

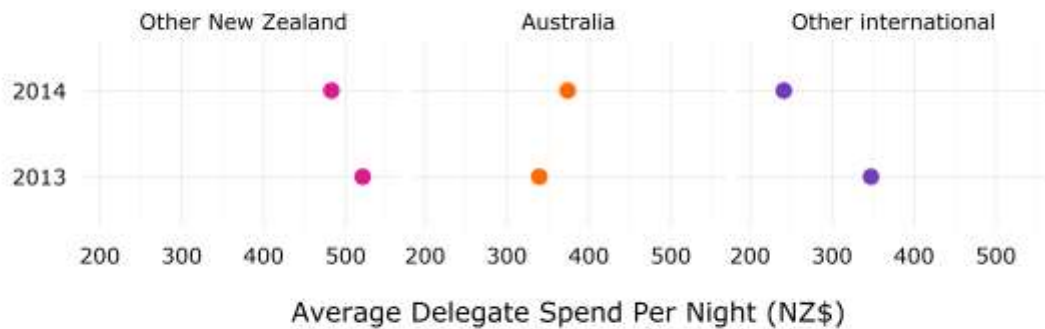
⁷ The CDS estimates per-conference delegate spend and is consistent with IVS measures of visitor spend. This estimate excludes expenditure associated other members of their travel party, for example spend associated with a non-conference-attending travel-partner. Prior to 2013 and the redesign of the CDS, the CDS included all expenditure “caused by” the multi-day conference/convention event.

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 (6.5 nights) compared to the number of nights other New Zealand delegates stay in the event region (2.9 nights). On average, domestic delegates spent \$483 per night in the event region, Australians spent \$374 per night in New Zealand and other international delegates spent \$241 per night in New Zealand (Figure 6). The average for all delegates who spent time away from home to attend conferences was \$406 per person per night.

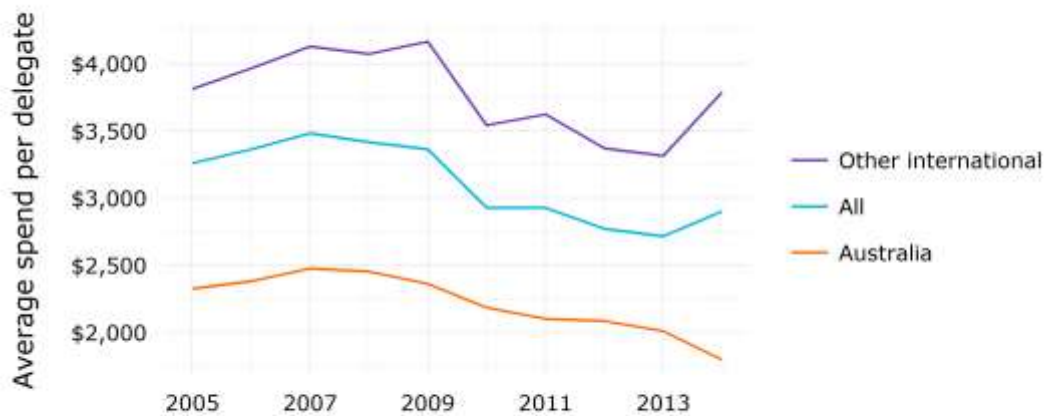
Figure 6: Average per night spend by origin



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

Comparing the average international delegate spend of \$1,991 from the CDS to international visitor spend from the IVS, holiday visitors spend more on average (\$3,600), while business visitors spend around the same (\$2,100). The overall average spend reported from the IVS is \$2900 for the year ending December 2014. The lower average spend for the CDS is not unexpected as international delegates only spend 6.5 nights in New Zealand while the average for all visitors is 20 nights and average for business visitors is 11 nights.

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



In contrast to the pattern of average spend; international delegates have a higher average spend per night than other visitors to New Zealand. Table 1 compares estimates of average spend per night from the IVS to the current CDS estimate. Delegates tend to stay for shorter periods in New Zealand (contributing to the lower average spend), but spend more per night than other visitors.

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

Source of spend (YE December 2014)	Average spend per night
IVS – all visitors	\$161
IVS – business visitors	\$148
IVS – holiday visitors	\$219
CDS – international delegates	\$304

Section 3: International travel

Statistics New Zealand's International Travel and Migration (ITM)⁸ data can also be used to report on changes to the international component of conferences and conventions. The number of overseas arrivals to New Zealand for convention/conference purposes peaked in 2007 at 62,000 only seven per cent above the 2014 number of 57,424.

Beneath the overall change we can see that the two markets reported in the CDS (Australia and other internationals) 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 2014 to the previous year; arrivals from Australia were up 20 per cent while other arrivals were only up five per cent. Overall, convention/conference arrivals for were up 7,136 or 14 per cent.

Figure 8: International conventions and conferences



Source: Statistics New Zealand, International Travel and Migration

As the proportion of Australian delegates increases, the overall average expenditure of international delegates will decrease. This decrease is due to Australian visitors spending less on average than other international delegates. The decline in reported average international spend is likely to partly reflect this change.

⁸ The ITM 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.

For the year ended December 2014 a total of 2,799 local, domestic and international convention/conference delegates from 80 events across New Zealand were surveyed through an online survey. These results were weighted to the following population totals:

- Local – 133,577
- Domestic – 174,915
- Australian – 37,326
- Other international – 21,514

The total estimated population of 367,332 delegates is sourced from the Convention Activity survey (CAS) for the year ended December 2014 and is the estimated number of delegates that attended multiday conferences and conventions in New Zealand. The international responses are weighted to the population of international visitors whose main purpose of visiting New Zealand was to attend a convention/conference, obtained from the ITM statistics published by Statistics New Zealand. New Zealand delegates (local and domestic) make up the remainder of the total population, with the ratio of local to domestic based on CAS delegate origin data.

The weighting procedure involves iterative proportional fitting (or raking) to ensure that the data matches the known population margins and that subgroups are accurately represented in the results.

The outlier detection and imputation has been conducted for total spend by delegate origin, per person spend and per night spend. As the weighting process does not take into account the distribution of delegates across New Zealand the CDS cannot provide information on spend per region.

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 (spend or costs relating to non-delegates are excluded, for example the cost of children travelling with the delegate) and is weighted to the population. The weighting process does not take into account the distribution of delegates across New Zealand, therefore, providing information on spend per region is not possible. International delegates are asked to report their spend 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.

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.
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.
Local delegate	A New Zealand resident that travels less than 40 km one way to attend an event
Per person spend	Total spend divided by the number of people in each person's party.

Appendix 1: CDS year ending December 2014 tables

Table 2: Visitor nights

	Total Nights		Nights in the event region		Outside the event region	
	2013	2014	2013	2014	2013	2014
Local	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Other New Zealand	471,556	510,160	471,556	510,160	N.A.	N.A.
Australia	212,343	182,540	155,947	141,881	56,396	40,659
Other international	174,132	202,510	109,107	120,679	65,025	81,831
Total	858,031	895,210	736,610	772,720	121,421	122,490

Table 3: Visitor nights per delegate

	Average nights		Average nights in the event region		Average nights outside the event region	
	2013	2014	2013	2014	2013	2014
Local	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Other New Zealand	3.0	2.9	3.0	2.9	0.0	0.0
Australia	5.7	4.9	4.2	3.8	1.5	1.1
Other international	8.7	9.4	5.4	5.6	3.2	3.8
All	4.0	3.8	3.5	3.3	0.6	0.5

Table 4: Delegates and delegate-days at event

	Event days		Average event days		Number of Delegates	
	2013	2014	2013	2014	2013	2014
Local	303,491	325,917	2.5	2.4	121,549	133,577
Other New Zealand	450,536	496,079	2.9	2.8	155,328	174,915
Australia	116,526	106,262	3.1	2.8	37,398	37,326
Other international	76,044	85,570	3.8	4.0	20,106	21,514
All	946,596	1,013,826	2.8	2.8	334,381	367,332

Table 5: Visitor expenditure

	Total delegate spend		Spend per delegate		Spend per night	
	2013	2014	2013	2014	2013	2014
Local	97,547,559	108,598,417	803	813	N.A.	N.A.
Other New Zealand	247,825,777	250,390,998	1,595	1,432	521	483
Australia	72,125,111	68,327,193	1,929	1,831	340	374
Other international	60,533,501	48,830,230	3,011	2,270	348	241
All	478,031,948	476,146,839	1,430	1,296	441	406

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 → **go to 2.**
 - b. No → **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?

Numerical box, number of days, maximum 10

4. Where did you last live for 12 months or more?

- a. New Zealand → **go to 15**
- b. Other country (please specify) → **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 → **Go to 11**
- b. With other people

Radio buttons, select one

9. Would it be easier for you to tell us about:
- What the visit to New Zealand cost **just for yourself** → *go to 11*
 - 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:
- Number aged 15+ **including yourself**
 - Number aged **less than 15**

Numerical 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?
- Put the total in on the bottom row of the table below and then leave the rest blank
 - 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:
- In New Zealand dollars
 - 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 Do not include any international airfares	<i>Numerals</i>
Costs paid for while you were in NZ:	<i>Numerals</i>
- amount paid by credit card	
- amount paid with Travel Card, Cash Card 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	<i>Numerals</i>
- amount paid by debit card	<i>Numerals</i>
- amount paid by travellers cheques	<i>Numerals</i>
- amount paid in cash	<i>Numerals</i>
- amount paid another way	<i>Numerals</i>

More

If you need another row, press this button

Total should be auto-populated based on row entries

<p>Total cost of [your visit to NZ / the visit to NZ by you and those you are answering for]</p> <p>Include costs paid before and during your visit to New Zealand</p> <p>NOT including any international airfares</p> <p>NOT including cost of [buying / maintaining house / flat / timeshare]</p>	<p><i>Numerals</i></p>
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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? → **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** → **go to 21**
- b. What the visit cost **for you and another person / people** → **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	<i>Numerals</i>
Costs paid for while you were in [city]:	
- amount paid by credit card	<i>Numerals</i>
- amount paid by debit card, EFT POS	<i>Numerals</i>
- amount paid in cash	<i>Numerals</i>
- amount paid another way	<i>Numerals</i>

More

If you need another row, press this button

Total should be auto-populated based on row entries

<p>Total cost of [your visit to [city] / the visit to [city] by you and those you are answering for]</p> <p>Include costs paid before and during your visit to [city]</p> <p>Include domestic airfares</p> <p>Include conference/convention registration fees</p>	<i>Numerals</i>
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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 Include any conference registration fees	<i>Numerals</i>
Costs paid for while you were at the conference/convention - amount paid by credit card	<i>Numerals</i>
- amount paid by debit card, EFT POS	<i>Numerals</i>
- amount paid in cash	<i>Numerals</i>
- amount paid another way	<i>Numerals</i>

More

If you need another row, press this button

Total should be auto-populated based on row entries

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

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.

