



MELBOURNE CONVENTION DELEGATE STUDY 2013

PREPARED BY MELBOURNE CONVENTION BUREAU 2013/14

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If you would like more information regarding this report, please contact:

Rebecca Elliott
Communications Manager
T +61 3 9693 3317
M +61 437 257 071
F +61 3 9693 3344
rebecca.elliott@melbournecb.com.au

Research company: Australian Fieldwork Solutions
Data analysis: Thomas White and Danielle Ramirez

FOREWORD



The Melbourne Convention Delegate Study 2013 was commissioned by the Melbourne Convention Bureau (MCB) to examine the conference delegate experience and the economic value driven from their attendance to the state's economy.

The fourth edition of the Study covers the period May to December 2013 and contains data gathered from 3,846 surveys completed by delegates from 150 countries, attending five major international conferences. This is the largest sample size in the history of the Study, with international delegates representing 80% of the total sample size.

In addition to travel patterns and dispersal, the Study also measures expenditure and satisfaction with Melbourne as a conference destination, and offers comparisons to the 2010 Study for analysis on how the delegate experience has changed over time.

Consistent with previous Studies, the 2013 edition highlights that major international conferences are a catalyst for travel, not only to Melbourne but to regional Victoria and other states and territories of Australia.

The findings from the Study all provide evidence of the significant economic value of conferences, which presents a strong business case to local and state government and other stakeholders to continue to support and invest in the industry.

They also will assist MCB and our strategic partners and members to continue to align our strategy and services with the evolving needs of the international association market to ensure Melbourne remains a competitive and leading global business events destination.

I would like to acknowledge the support of the Victorian State Government and the Melbourne Convention and Exhibition Centre in assisting MCB to facilitate this research.

A handwritten signature in black ink, appearing to read 'KB' followed by a stylized flourish.

Karen Bolinger
Chief Executive Officer
Melbourne Convention Bureau



EXECUTIVE SUMMARY

INCREASED ATTENDANCE FROM ASIAN DELEGATES

The 2013 Study has revealed that almost half (49%) of all international delegates surveyed came from Asia, an 11% increase from the 2010 Study. This dominance was partially due to the increased proportion of delegates arriving from India (up 6% from the 2010 Study) and China (up 4% from the 2010 Study).

RISE IN TRAVEL TO REGIONAL VICTORIA

While delegates' primary reason for visiting Melbourne is to attend conferences, the 2013 Study revealed that more delegates are taking the opportunity to explore the city and travel to regional Victoria and other Australian destinations. Over half of all delegates surveyed (56%) indicated they visited regional Victoria and/or other parts of Australia pre/post conference, representing a 26% increase from the 2010 Study.

GROWTH IN ECONOMIC CONTRIBUTION

On average, international delegates spent \$1,019 per day during the conference in Melbourne, representing a 28% increase from the 2010 Study. Similarly, national delegates' spend per day increased by over a third (35%), with a daily spend of \$959. Local businesses benefit substantially from this with 74% of international delegates (up by 16% from 2010) spending an average of \$87 per day on shopping. This equates to a \$1 million injection into local retailers from surveyed international delegates alone.

CONFERENCES ATTRACT ADDITIONAL VISITORS

Over a quarter (26%) of all delegates were accompanied on their trip to Melbourne while attending a conference. The average number of additional visitors was 2.6 people per delegate. It is therefore estimated that 168 visitors come to Melbourne per 100 delegates. These visitors, with no involvement in the conference, use their free time to explore Melbourne's attractions, and participate in activities throughout the city, regional Victoria, and Australia.

CONFERENCES LEAD TO RETURN VISITATION

The majority of international delegates (71%) had never visited Australia prior to attending a conference in Melbourne. After experiencing Melbourne as a business events destination, almost all (95%) international delegates would recommend it as a place to visit to their family and colleagues, while more than three quarters (76%) intend on returning for a holiday.

KEY FINDINGS

INTERNATIONAL DELEGATES

Demographics	The majority of international delegates came from Asia (49%), Western Europe (12%) and North America (10%) and were aged between 40 and 59 years of age (54%).
Previous travel to Australia	71% of international delegates were first time visitors to Australia.
Influence on travelling to Australia	Half (50%) of international delegates would not have visited Australia in the next three years if they were not attending a conference in Melbourne.
Attendance decision	53% decided to attend the conference in Melbourne within 12 months of the event.
Reason for attendance	The primary motivations for attending a conference in Melbourne were the content/program of the conference (74%), as well as the chance to visit Australia (37%) and Melbourne (36%).
Benefits of attendance	International delegates attended conferences in Melbourne to obtain information that will enhance their personal and business performance (69%), as well as to expose themselves to new knowledge (63%).
Travel planning	78% sourced information on Melbourne before or during their visit. The most valued sources of information were the conference website (36%), travel guide books (25%) and the Melbourne Visitor Map (20%).
Delegate travel party	28% travelled to Melbourne with people who did not attend the conference. The average number of accompanying persons was 2.8 (e.g. spouse/partner and friends). This equates to an extra 78 international visitors for every 100 international conference delegates.
Travel duration	International delegates stayed in Melbourne for 5.8 nights while attending a conference and 6.5 nights in Melbourne overall. On average, international delegates stayed in Australia for 8.3 nights, representing an additional 2.5 nights of travel pre/post the conference.
Regional Victoria pre and post conference travel	38% undertook pre and/or post travel to regional Victoria. The most popular destination was the Great Ocean Road (71%), with touring delegates staying for an average of 2 nights.

Australia pre and post conference travel	36% travelled to other parts of Australia before or after the conference. Sydney was the most popular destination (83% stayed for an average of 4.3 nights).
Delegate expenditure	On average, international delegates spent \$1,019 per day and \$5,501 in total during their time in Melbourne. Major contributors to international delegate spend were accommodation (\$211 per day), domestic air travel (\$148 per day) and conference registration (\$137 per day).
Key activities in Melbourne	76% participated in activities in Melbourne while attending a conference. Shopping (74%) was the most popular activity with an average spend of \$87 per delegate, per day in Melbourne.
Melbourne's attributes	The friendliness of people, convention facilities, and safety were pinpointed as among the most satisfying attributes of Melbourne.
Major Melbourne attractions	South Wharf Promenade, Docklands, and the suburb of St Kilda were considered the most satisfying Melbourne attractions.
Recommending Melbourne	After attending a conference in Melbourne, 95% would recommend the city as a place to visit to their friends and colleagues.
Holidaying in Melbourne	76% of international delegates believe they will return to Melbourne for a holiday in the next five years.

KEY FINDINGS

NATIONAL DELEGATES

Demographics	64% travelled from other states to attend a conference in Melbourne, primarily from New South Wales (21%) and Queensland (16%), while 36% came from intrastate. The majority (54%) were aged between 40 and 59.
Influence on travelling to Melbourne	48% would not have visited Melbourne in the next 12 to 18 months if they were not attending a conference in the city.
Attendance decision	The majority (84%) decided to attend a conference held in Melbourne in the 12 months leading up to the event.
Reason for attendance	The content and program of the conference (82%) was the dominant reason for attending a conference in Melbourne.
Benefits of attendance	Obtaining information that will enhance their personal and business performance (82%) and the exposure to new knowledge for educational purposes (80%) were indicated as the primary benefits for attending conferences in Melbourne.
Travel planning	90% sourced information on Melbourne before or during their visit, with word-of-mouth considered the most valuable source (24%). Other valuable sources of information were the conference website (20%) and the Melbourne Visitor Map (18%).
Delegate travel party	17% were accompanied on their trip to Melbourne to attend a conference. The average number of accompanying visitors was 1.5.
Travel duration	National delegates stayed in Melbourne for an average of 5.1 nights to attend a conference and 5.4 nights in total.
Regional Victoria pre and post conference travel	28% travelled to regional Victoria pre/post conference. The majority (55%) travelled to the Great Ocean Road for an average of 2.4 nights.
Delegate expenditure	National delegates spent an average of \$959 per day and \$3,953 during their entire stay in Melbourne. The major contributors to this spend were accommodation (\$193 per day), conference registration (\$178 per day) and domestic air travel (\$104 per day).
Key activities in Melbourne	The majority (93%) participated in activities while in Melbourne. Shopping (65%) was the most popular activity, with an average spend of \$83 per delegate, per day.
Melbourne's attributes	National delegates singled out Melbourne's shopping variety as the most satisfying attribute of the city.
Major Melbourne attractions	South Wharf Promenade, the central shopping district and Queen Victoria Market were considered the most satisfying attractions.
Recommending Melbourne	98% would recommend Melbourne as a place to visit to their family and colleagues.
Holidaying in Melbourne	94% believe they will return to Melbourne in the next five years for a holiday.

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BACKGROUND

The Melbourne Convention Delegate Study 2013 was conducted by the Melbourne Convention Bureau (MCB) with the aim of examining travel patterns, spending habits and satisfaction levels of delegates attending conferences in Melbourne. It is intended that the outcomes of the study will:

- > **Measure delegate expenditure** – to determine the contribution that delegates make to the local, state and national economy.
- > **Monitor delegate profiles** – to better understand the people who travel to Melbourne for the purpose of attending a conference including their country of residence, travel companions, length of stay and benefits gained from their attendance.
- > **Measure delegate satisfaction** – to provide organisers with statistics on how their conference was perceived, to review Melbourne's strengths as a conference destination and to identify areas for improvement.
- > **Ensure ongoing stakeholder support** – to attract large and prestigious international conferences to Melbourne that reinforce the city's reputation as Australia's business events capital.



METHODOLOGY

MCB distributed hardcopy, self-complete questionnaires to delegates that attended five international association conferences held at Melbourne Convention and Exhibition Centre (MCEC) in 2013. The conferences represented a range of industry sectors and attracted a mix of delegates from 150 countries.

A stand was set up at each conference which was operated by MCB staff members and a representative from Australian Fieldwork Solutions (AFS); the organisation's market research fieldwork partner. Registered delegates were asked to voluntarily complete the short questionnaire about their accommodation, pre and post conference travel, expenditure and their satisfaction with Melbourne as a conference destination in return for a small gift. The researchers actively pursued delegates in the exhibition areas and outside the plenary rooms where there was a high level of attendee traffic, as permitted by the conference organisers, to ensure a random cross section of delegates was obtained and to avoid selection bias from self-selecting delegates.

The questionnaire required between five and eight minutes to complete. Delegates had the opportunity to complete the questionnaire before and after the programmed sessions and during breaks. To maximise the number of completed questionnaires, delegates were encouraged to participate in the Study during proceedings via broadcasted announcements at the conference and via a PowerPoint slide in plenary sessions.

Across the five conferences there were 19,367 delegates in attendance, with 3,846 completing the questionnaire, resulting in a response rate of 20%. A mixture of local, national and international delegates participated.

The Study is divided into two sections: international delegates and national delegates. The results are compared to the Melbourne Convention Delegate Study 2010 where applicable.

WHAT'S DIFFERENT TO THE 2010 STUDY?

While the majority of questions asked of delegates were derived from the Melbourne Convention Delegate Study 2010 for comparison, a number of additional questions were included in the Study to gain a greater understanding of delegate travel patterns and satisfaction levels.

Additional questions asked in 2013 were:

- > How far in advance did you decide to attend this conference?
- > What benefits have/will you gain from attending this conference?
- > Where did you get information about Melbourne before and during your trip?
- > What sources of information were most valuable?

Furthermore, the 2010 question, "Have you planned to holiday in regional Victoria or other parts of Australia, either before or after attending the conference", was divided into two questions:

- > Have you visited/will you visit regional Victoria before or after attending the conference?
- > Have you visited/will you visit other parts of Australia before or after attending the conference?

Survey statistics

Total number of attendees	19,367
Completed questionnaires	3,846
Response rate	20%

15% MORE SURVEYS COMPLETED COMPARED TO THE 2010 STUDY

SAMPLE DETAIL

As with all such studies, the Melbourne Convention Delegate Study 2013 is subject to error, as not all delegates visiting Melbourne during the sample period were surveyed. Due to the sample size, results from small states, territories and regions may be less conclusive than those from larger states, territories, and regions. Essentially, if the Study was repeated using the same method of sampling we can be more confident that the results from the larger states, territories, and regions would be the same. Results should be interpreted with this in mind.

International delegates represented 80% of the Study's total sample size, with national delegates representing the remaining 20%.

DELEGATE DETAILS

Region of Residence	Sample Size	State/Territory of Residence	Sample Size
Asia	1,470	Victoria	280
Western Europe	361	New South Wales	164
North America	293	Queensland	127
Africa	255	Western Australia	72
South America	196	South Australia	53
Eastern Europe	139	Australian Capital Territory	51
Middle East	133	Tasmania	14
South Pacific	91	Northern Territory	14
UK & Ireland	68	Total	775
Total	3,006		

* Note: Not all delegates provided their region of residence - these have been removed from some of the analysis.

CONFERENCE DETAILS

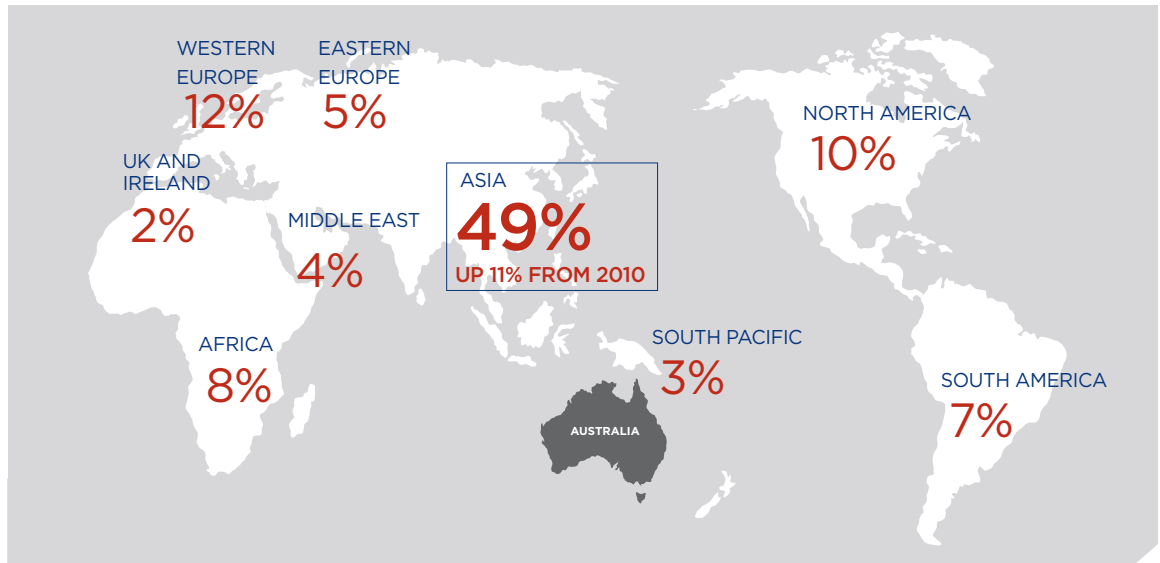
Conference Name	Date	Total Attendance	Completed Surveys	Split
International Council of Nurses 25th Quadrennial Congress	18-23 May	3,890	889	706 International 183 National
IEEE International Geoscience and Remote Sensing Symposium	21-26 July	1,398	235	220 International 15 National
International Congress of Pediatrics	24-29 Aug	2,817	640	509 International 131 National
IEEE International Conference on Image Processing	15-18 Sep	1,025	249	230 International 19 National
22nd World Diabetes Congress	2-6 Dec	10,237	1,833	1,397 International 436 National
Total		19,367	3,846	3,062 International 784 National

INTERNATIONAL DELEGATES

1. BACKGROUND INFORMATION

REGION OF RESIDENCE

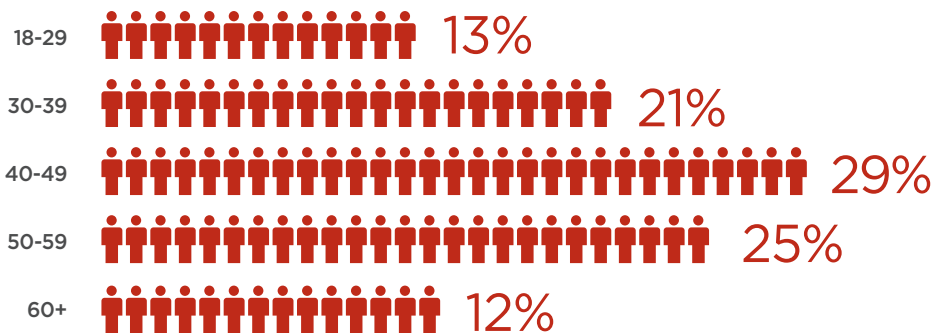
What is your region of residence? Base n= 3006 (single response)



Almost half (49%) of the international delegates came from Asia, with Western Europe (12%) and North America (10%) rounding out the top three regions of residence. Melbourne has seen a rise in delegate arrivals from Asia in recent years, as evidenced by the 11% regional increase from the 2010 Study.

AGE

In which age group do you belong? Base n= 3054 (single response)



Over half of the international delegates (54%) were aged between 40 and 59 years of age.

2. PRE CONFERENCE

ATTENDANCE DECISION

How far in advance did you decide to attend this conference?

Base n= 3044 (single response)

At the previous conference	22%
When I saw the call for papers	9%
When my abstract was accepted	14%
1 year prior	15%
7-11 months prior	12%
2-6 months prior	22%
1 month prior	2%
Less than 1 month prior	2%
Total	100%

The majority of international delegates (53%) chose to attend the conference in Melbourne within 12 months of the event, while more than one in five delegates (22%) made their decision at the previous conference.

REASONS FOR ATTENDING

What were your reasons for attending this conference?

Base n= 3045 (multiple response)

Content/program of conference	74%
Opportunity to visit Australia	37%
Opportunity to visit Melbourne	36%
Reputable speakers and presenters	33%
Social program/networking opportunities	20%
Regular attendee at this event	14%
Safety and security of the destination	12%
Perception of Melbourne being a knowledge centre	12%
Destination appeal	10%

Almost three quarters of the international delegates attended a conference in Melbourne because of the content/program (74%), while over a third attributed their decision to the opportunity to visit Australia (37%) and/or Melbourne (36%). This indicates that while the conference content is evidently the major influencing factor behind delegate attendance, Melbourne and Australia are widely recognised as favourable business events destinations.

BENEFITS FROM ATTENDING

What benefits have/will you gain from attending this conference? Base n= 3038 (multiple response)

Obtain information that will enhance my personal and/or business performance	69%
Exposure to new knowledge for educational purposes	63%
Build relationships with speakers, delegates, visitors, exhibitors and/or organisations	45%
Make new connections that lead to enhanced research outcomes or research grants	29%
Profile my expertise	22%

Over two thirds of international delegates (69%) attended a conference in Melbourne to gain information that will enhance their personal and/or business performance. Other major benefits included the exposure to new knowledge for educational purposes (63%), building relationships with conference attendees (45%), and the chance to make connections to further develop research outcomes and grants (29%).

3. INFORMATION SOURCING

BEFORE THE TRIP

Where did you get information about Melbourne before your trip?
Base n= 2816 (multiple response)

Conference website	63%
Travel guide books	27%
MCB website	23%
Tourism Australia website	22%
Word-of-mouth	21%
City of Melbourne What's On website	9%
Facebook	9%
Visit Victoria website	7%

DURING THE TRIP

Where did you get information about Melbourne during your trip?
Base n= 2084 (multiple response)

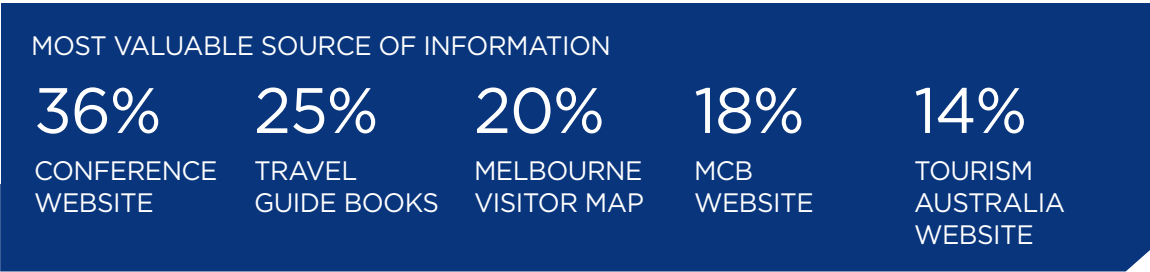
Melbourne Visitor Map	48%
Travel guide books	30%
Official Visitors Guide	26%
Hotel concierge	26%
Conference website	21%
Word-of-mouth	18%
Tourism Australia website	12%
MCB website	10%

MOST VALUABLE SOURCE OF INFORMATION

What source of information about Melbourne has been most valuable? Base n= 3015 (single response)

The majority of international delegates (78%) sourced information on Melbourne. The conference website (36%) and travel guide books (25%) were considered the most valuable sources of information. Other valuable sources were the Melbourne Visitor Map (20%) and MCB website (18%).

Interestingly, a large portion of international delegates indicated they used travel guide books both before (27%) and during (30%) their trip to Melbourne, with a quarter of delegates (25%) believing they are the most valuable source of information available. Although delegates have access to a host of modern technologies, evidently a large portion still consider the traditional methods of travel research to be effective.



4. TRAVEL PARTY

ACCOMPANYING PERSONS

Did anyone accompany you on this trip who did not attend the conference?

Base n= 3035 (single response)

If yes, how many people accompanied you? Base n= 828 (single response)

More than one quarter (28%) of international delegates were accompanied on their trip to Melbourne. The average number of accompanying persons who did not attend the conference (e.g. spouse, partner, or friend) was 2.8. This equates to over 2,300 additional international visitors to Melbourne from the surveyed conferences alone. Therefore, for every 100 international delegates that attend a conference, Melbourne welcomes an additional 78 accompanying persons.

OVER 2,300
ADDITIONAL VISITORS
TRAVELLED TO
MELBOURNE FROM
THE SURVEYED
CONFERENCES ALONE



5. LENGTH OF STAY AND DISPERSAL

LENGTH OF STAY

How many nights will you (and members of your travel party) stay in Melbourne to attend this conference? Base n= 3017 (single response)

How many nights will you (and members of your travel party) stay in Melbourne for your entire trip? Base n= 3003 (single response)

How many nights will you (and members of your travel party) stay in Australia for your entire trip? Base n= 2936 (single response)

Stay in Melbourne for conference



Stay in Melbourne total



Stay in Australia total



The conferences included in the 2013 Study had an average duration of 5.4 days. As such, international delegates stayed in Melbourne for an average of 5.8 nights to attend the conference. In contrast to the 2010 Study, the 2013 Study revealed that African respondents stayed for the longest duration in Melbourne, compared with delegates from Asia who stayed the fewest nights.

International delegates also indicated they stayed in Melbourne for an average of 6.5 nights. Delegates from Africa, South Pacific, and both Eastern and Western Europe stayed for over seven nights to experience Melbourne.

Furthermore, international delegates stayed in Australia for an average of 8.3 nights, representing an additional 2.5 nights of travel before or after the conference.

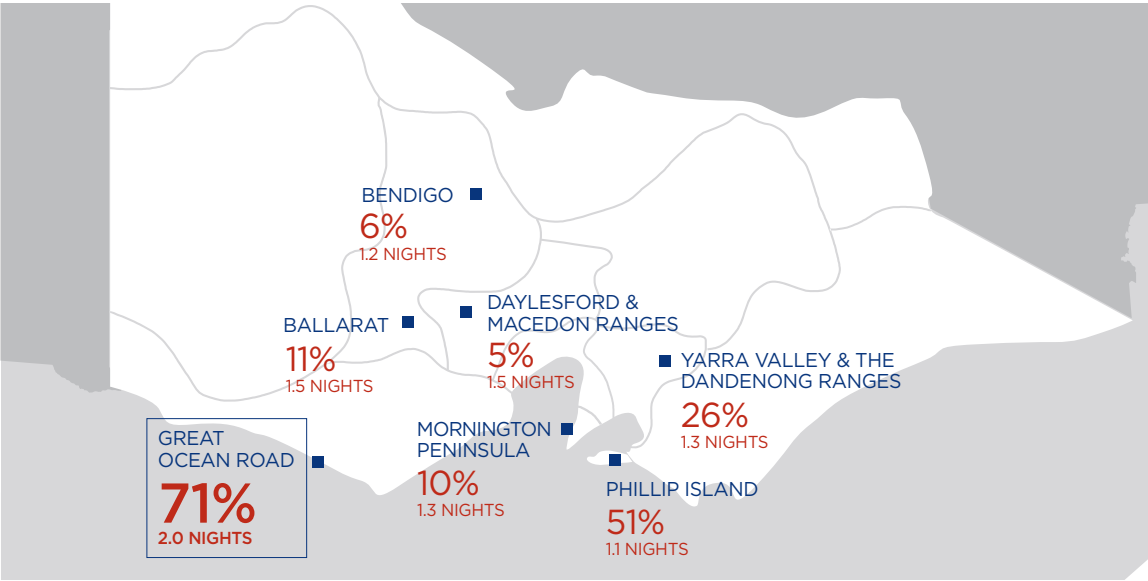
Overall, delegates from the Middle East stayed the longest in the country, spending over 11 nights, whereas delegates from Asia stayed the shortest time, spending just under seven nights in Australia.

DELEGATES STAYED AN AVERAGE OF
2.5 NIGHTS
IN ADDITION TO THE CONFERENCE



PRE AND POST CONFERENCE TRAVEL - REGIONAL VICTORIA

Have you visited/will you visit regional Victoria before or after attending the conference? Base n= 3028 (single response)
How many nights in each destination? Base n= 679 (multiple response)



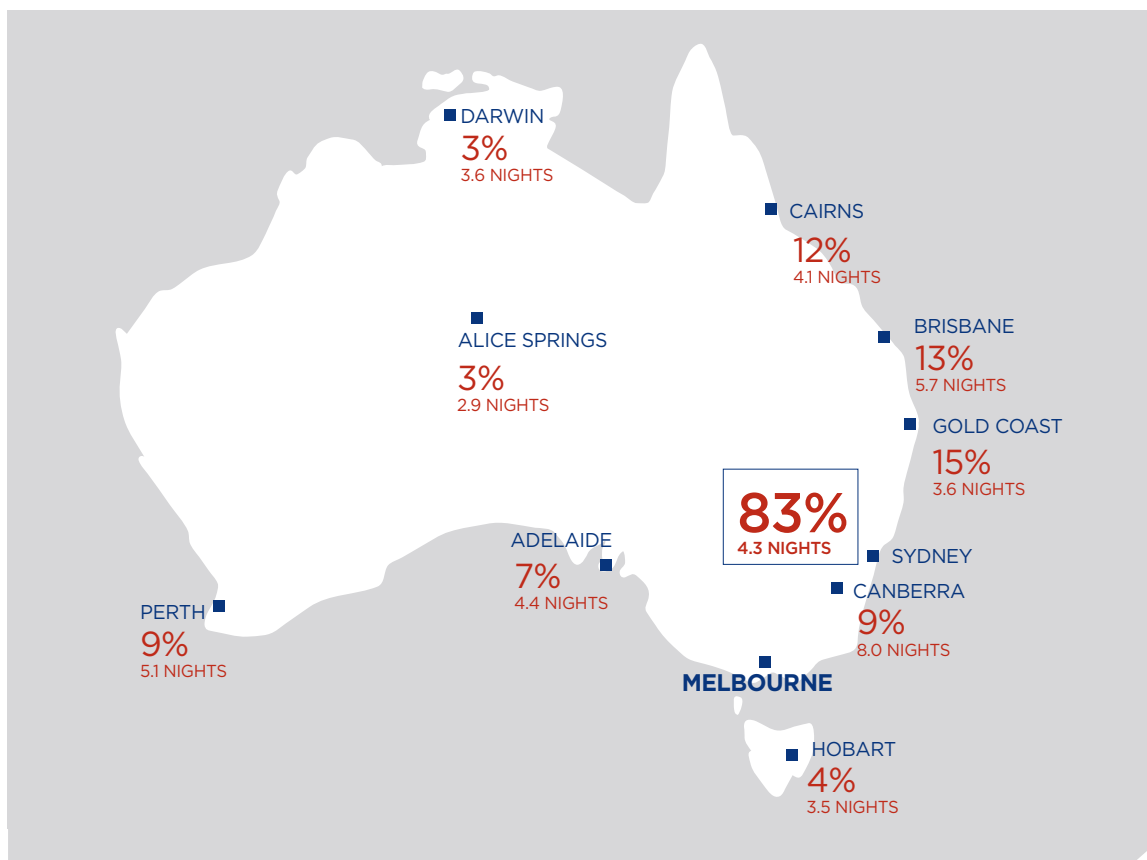
Almost four in every ten international delegates (38%) visited regional Victoria before and/or after the conference. The Great Ocean Road was the most popular regional Victorian destination, with 71% of touring delegates staying for an average of two nights.

38%
VISITED REGIONAL VICTORIA BEFORE
OR AFTER THE CONFERENCE

PRE AND POST CONFERENCE TRAVEL - AUSTRALIA

Have you visited/will you visit other parts of Australia before or after attending the conference? Base n= 3062 (single response)

How many nights in each destination? Base n= 823 (multiple response)



Over a third of international delegates (36%) visited at least one other Australian destination, with Sydney (83%) being the most popular.

36%

VISITED OTHER PARTS OF AUSTRALIA
BEFORE OR AFTER THE CONFERENCE

6. EXPENDITURE

EXPENDITURE PER TRIP

How much have you spent or do you intend to spend on yourself and others on the following items? Base n= 2587 (multiple response)

Per Trip in Melbourne	Amount
Accommodation	\$1,148
Domestic air travel	\$825
Registration	\$713
Shopping	\$472
Dining out/restaurants	\$389
Tours	\$333
Recreational activities	\$298
Theatre/concert/cinemas	\$258
Ground transport	\$143
Phone/internet	\$92
Other	\$829
Total	\$5,501

International delegates spent an average of \$5,501 during their time in Melbourne, representing a 33% increase in spending compared to the 2010 Study. The additional \$1,367 in total delegate spend is due to the increased spend on domestic air travel (up by \$380), accommodation (up by \$175), theatre/concerts/cinemas (up by \$168), recreational activities (up by \$112), and tours (up by \$95). Although the international delegate spend has increased since the 2010 Study, small reductions in spending were recorded in shopping (down by \$61) and dining out/restaurants (down by \$20).

It should be noted that the average delegate spend does not include any expenses incurred from international airfares.

EXPENDITURE PER DAY

How much have you spent or do you intend to spend on yourself and others on the following items? Base n= 2552 (multiple response)

Per Day in Melbourne	Amount
Accommodation	\$211
Domestic air travel	\$148
Registration	\$137
Shopping	\$87
Dining out/restaurants	\$72
Tours	\$63
Recreational activities	\$62
Theatre/concert/cinemas	\$53
Ground transport	\$27
Phone/internet	\$17
Other	\$144
Total	\$1,019

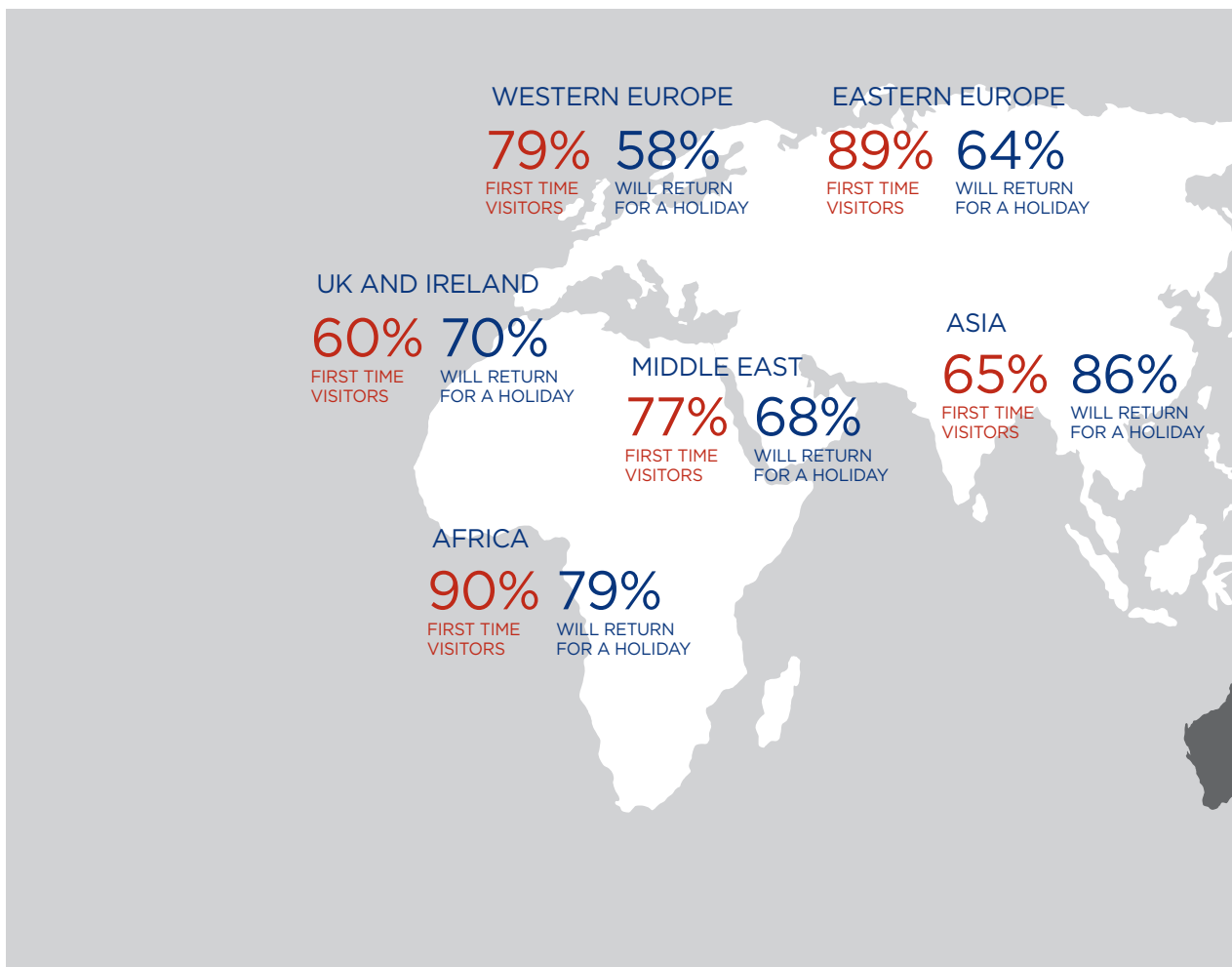
International delegates spent an average of \$1,019 per day in Melbourne, an increase of 28% on the 2010 Study. The main contributors to this increased daily spend were domestic air travel (up by \$64), theatre/concert/cinemas (up by \$36) and recreational activities (up by \$25).

\$1,019 DELEGATES SPENT
IN MELBOURNE PER DAY

28% INCREASE IN DAILY SPEND
FROM THE 2010 STUDY



7. SATISFACTION WITH MELBOURNE



FIRST TIME VISITORS
TO AUSTRALIA

71%

INFLUENCE ON
VISITING AUSTRALIA

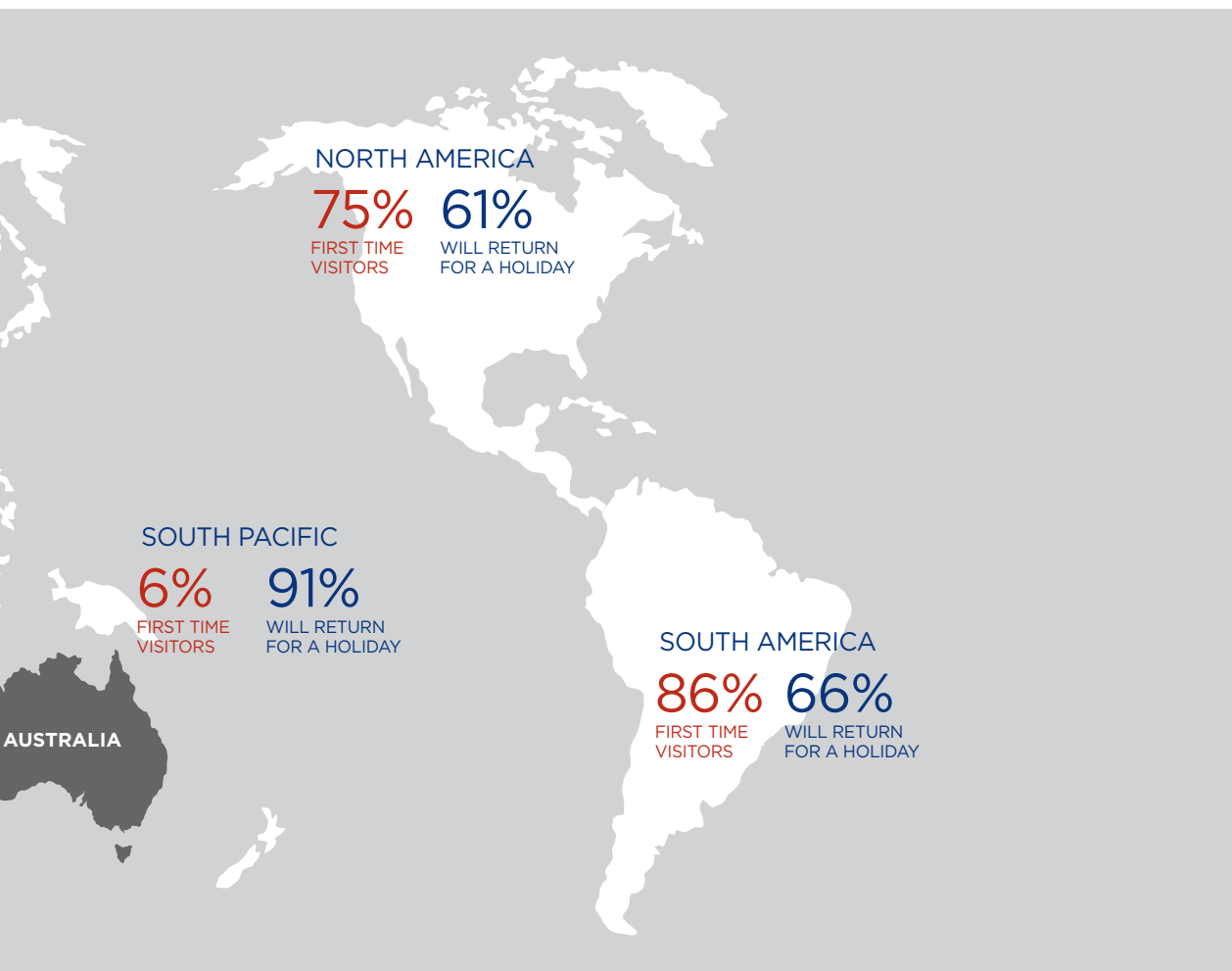
50%

Have you visited Australia before? Base n= 3028 (single response)

71% of international delegates were first time visitors to Australia. Unsurprisingly, a high percentage of delegates from South Pacific (94%) had previously visited Australia.

Would you have visited Australia in the next three years if this conference wasn't held in Melbourne? Base n= 2966 (single response)

Half of all international delegates (50%) indicated they would not have visited Australia in the next three years if the conference had not been held in Melbourne.



WILL RETURN TO MELBOURNE
FOR A HOLIDAY

76%

LIKELIHOOD OF
RECOMMENDING MELBOURNE

95%

In the next five years, do you think you might return to Melbourne to visit for a holiday? Base n= 2967 (single response)

The majority of delegates (76%) from all international regions reported they would like to return to Melbourne for a holiday in the next five years. As expected, the geographically closer regions of the South Pacific (91%) and Asia (86%) recorded the highest levels of Interest.

Would you recommend Melbourne as a place to visit to your friends/ colleagues? Base n= 2996 (single response)

Consistent with the 2010 Study, after attending a conference in Melbourne almost all (95%) international delegates would recommend the city to their friends and colleagues as a place to visit. Delegates from the South Pacific (99%) and Eastern Europe (98%) were the most likely to make this recommendation.

MELBOURNE ACTIVITIES

Will you do any of the following whilst in Melbourne?
Base n= 2914 (multiple response)

Go shopping	74%
Visit parks and gardens	69%
Visit galleries and museums	44%
Experience the bars, entertainment and nightlife	34%
Explore the precincts and laneways	23%
Attend events (e.g. festivals, cultural, sports)	21%
Attend theatre/performances/concerts	9%

The majority of international delegates (76%) participated in activities while in Melbourne. Shopping and visiting parks/gardens have consistently been found to be the most popular activities. With international delegates spending an average of \$87 a day on shopping in Melbourne, approximately \$1 million has been injected into local retailers from surveyed international delegates alone. A large proportion of respondents also experienced Melbourne’s galleries/museums (44%) and explored Melbourne’s bars, entertainment and nightlife (34%).

MELBOURNE ATTRIBUTES

How satisfied are you with the following in Melbourne? (where 1 = very dissatisfied, 5 = very satisfied) *Base n= 2962 (single response)*

Consistent with the 2010 Study, the friendliness of people, convention facilities, and safety were pinpointed as the most satisfying attributes of Melbourne (rated 4.3 out of 5).

MELBOURNE ATTRACTIONS

How satisfied are you with Melbourne’s attractions and highlights? (where 1 = very dissatisfied, 5 = very satisfied)
Base n= 2308 (single response)

All proposed Melbourne attractions recorded high satisfaction levels, rating at least 4.1 out of 5. Delegates that visited Melbourne’s major attractions were most satisfied with South Wharf Promenade, Docklands and the suburb of St Kilda (rating 4.2 out of 5).

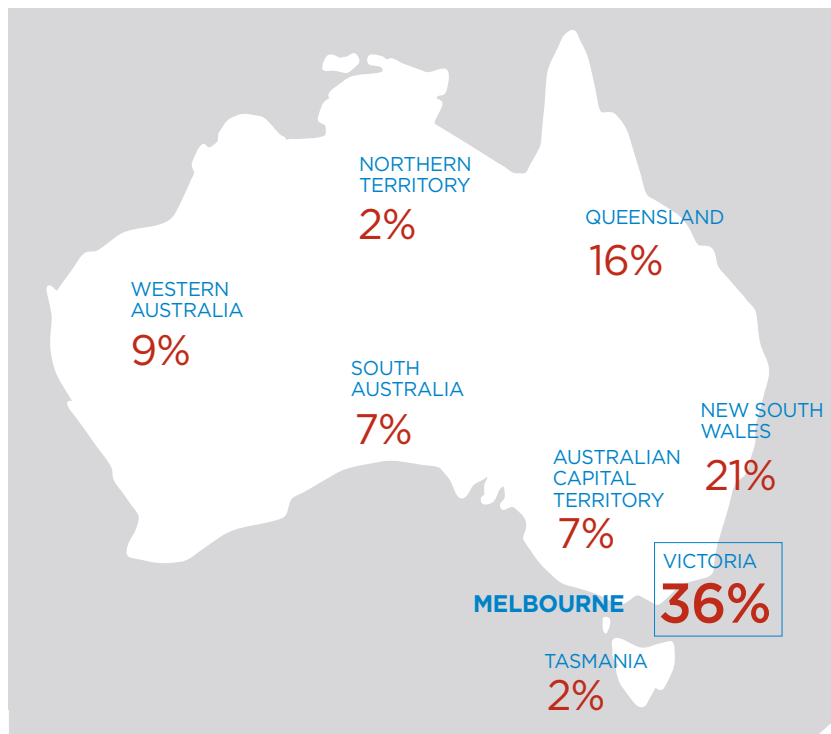


NATIONAL DELEGATES

1. BACKGROUND INFORMATION

STATE/TERRITORY OF RESIDENCE

In which state/territory do you reside? Base n= 775 (single response)



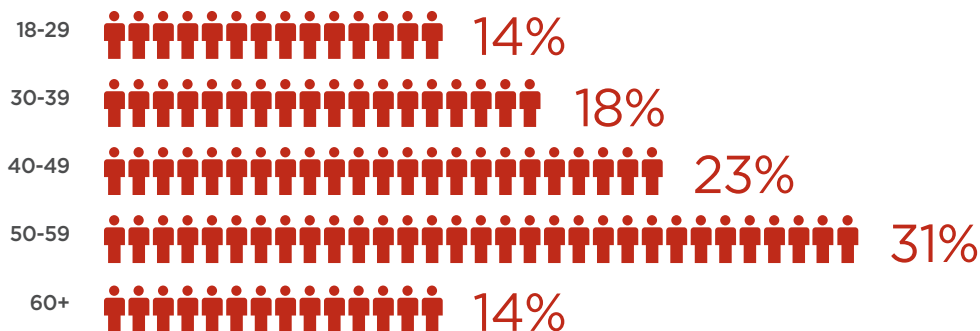
64% of national delegates were from interstate, up from 58% in 2010. New South Wales (21%) and Queensland (16%) represented the largest interstate attendance, while Victorian delegates accounted for the remaining 36% of national delegates. The increase in interstate attendance has positively affected the average national delegates' expenditure, benefiting a wide range of Melbourne businesses.

64%

CAME FROM
INTERSTATE
(UP 6% FROM
THE 2010 STUDY)

AGE

In which age group do you belong? Base n= 3054 (single response)



The majority (54%) of national delegates were aged between 40 and 59 years of age.

2. PRE CONFERENCE

ATTENDANCE DECISION

How far in advance did you decide to attend this conference?

Base n= 781 (single response)

At the previous conference	4%
When I saw the call for papers	6%
When my abstract was accepted	5%
1 year prior	15%
7-11 months prior	20%
2-6 months prior	37%
1 month prior	5%
Less than 1 month prior	7%
Other	1%

The majority of national delegates (84%) decided to attend the conference in the 12 months leading up to the event, with only a small proportion (4%) deciding at the previous conference.

REASONS FOR ATTENDING

What were your reasons for attending this conference?

Base n= 781 (multiple response)

Content/program of conference	82%
Reputable speakers and presenters	45%
Social program/networking opportunities	29%
Opportunity to visit Melbourne	23%
Trade show/exhibition component	15%
Destination appeal	12%
Safety and security of the destination	10%
Required to attend	8%

More than eight out of 10 national delegates (82%) indicated they attended the conference because of the content/program offered. Both the reputation of the speakers/presenters (45%) and the chance to network (29%) also contributed to their decision to attend.

BENEFITS FROM ATTENDING

What benefits have/will you gain from attending this conference? Base n= 781 (multiple response)

Obtain information that will enhance my personal and/or business performance	82%
Exposure to new knowledge for educational purposes	80%
Build relationships with speakers, delegates, visitors, exhibitors and/or organisations	50%
Make new connections that lead to enhanced research outcomes or research grants	25%
Profile my expertise	18%
Other	1%

Similarly to international delegates, national delegates identified knowledge exchange as the major benefit of attending conferences in Melbourne. At least eight out of 10 national delegates indicated they attended a conference in Melbourne to acquire information that will enhance their personal and/or business performance (82%) and expose themselves to new knowledge (80%).

3. INFORMATION SOURCING

BEFORE THE TRIP

Where did you get information about Melbourne? Base n= 681 (multiple response)

Conference website	36%
Word-of-mouth	27%
MCB website	11%
City of Melbourne What's On website	10%
I live here/have lived here before	9%
Travel guide books	7%
Visit Victoria website	6%
Previous visits	5%

DURING THE TRIP

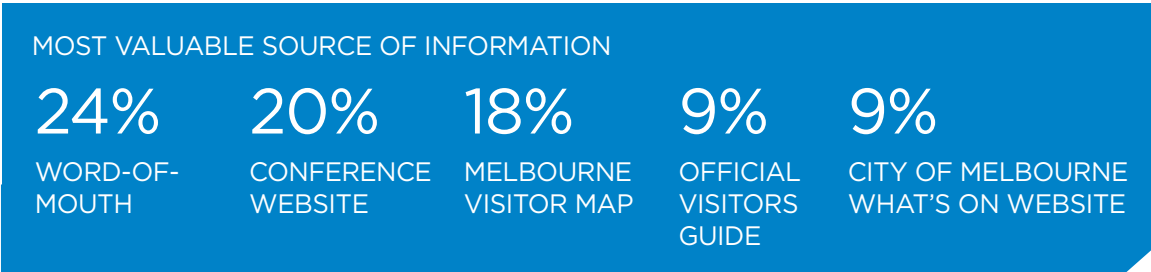
Where did you get information about Melbourne during you trip? Base n= 499 (multiple response)

Melbourne Visitor Map	37%
Word-of-mouth	21%
Official Visitors Guide	21%
Hotel concierge	18%
Conference website	14%
City of Melbourne What's On website	10%
Travel guide books	9%
I live here/have lived here before	8%

MOST VALUABLE SOURCE OF INFORMATION

What source of information about Melbourne has been most valuable? Base n= 696 (multiple response)

Nine out of 10 national delegates (90%) sourced information on Melbourne before or during their trip. Similarly to international delegates, national delegates still appreciate the more traditional sources of travel information. The 2013 Study revealed that national delegates sought word-of-mouth as a source of information both before (27%) and during (21%) their trip, while also considering it the most valued source of information (24%) overall. Other valued sources of information were the conference website (20%) and the Melbourne Visitor Map (18%).



4. TRAVEL PARTY

ACCOMPANYING PERSONS

Did anyone accompany you on this trip who did not attend the conference? Base n= 772 (single response)

How many people accompanied you? Base n= 124 (single response)

17% of national delegates were accompanied on their trip to Melbourne. The average number of accompanying persons who did not attend the conference was 1.5. Delegates from Queensland and Western Australia were more likely to be accompanied by others. As expected, fewer national delegates (11% less) travel with fewer accompanying persons (1.3 less people) than international delegates.

5. LENGTH OF STAY AND DISPERSAL

LENGTH OF STAY

How many nights will you (and members of your travel party) stay in Melbourne to attend this conference? Base n= 640 (single response)

How many nights will you (and members of your travel party) stay in Melbourne for your entire trip? Base n= 644 (single response)

Stay in Melbourne for conference



Stay in Melbourne total

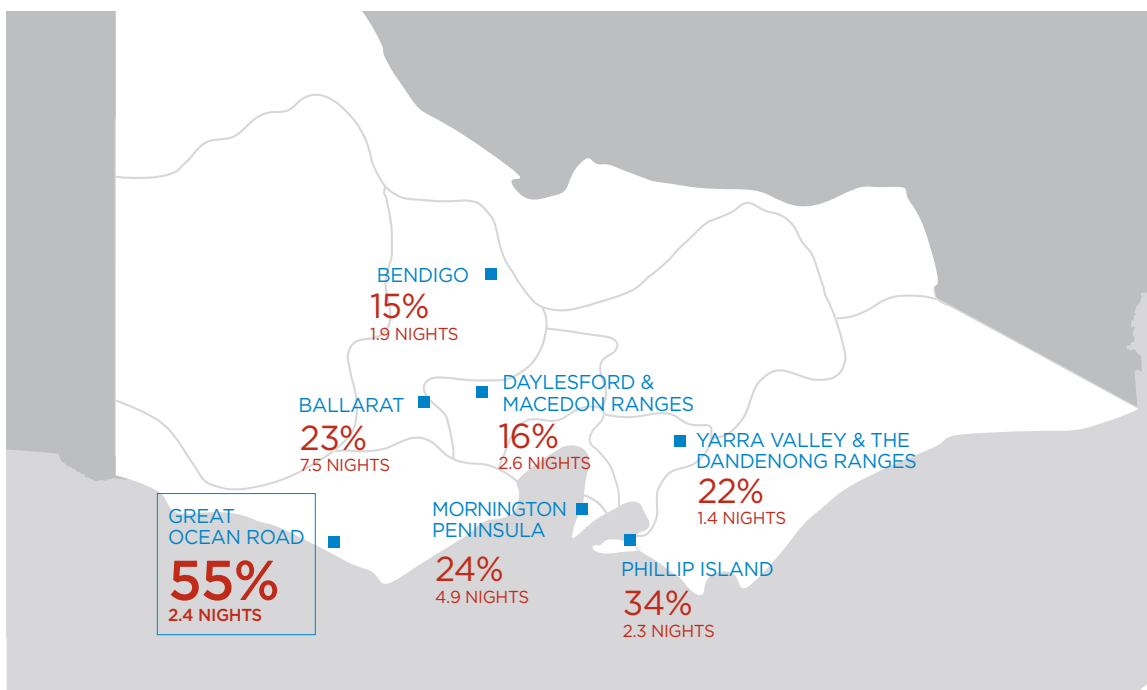


National delegates stayed in Melbourne for an average of 5.1 nights to attend a conference and 5.4 nights in total, representing an increase of 0.2 nights and 0.1 nights from the 2010 Study (respectively). Delegates from the Northern Territory and Western Australia were more likely to stay longer.

PRE AND POST CONFERENCE TRAVEL - REGIONAL VICTORIA

Have you visited/will you visit regional Victoria before or after attending the conference? Base n= 738 (single response)

How many nights in each destination? Base n= 32 (multiple response)



While the 2010 Study reported 9% of national delegates travelled to regional Victoria or other parts of Australia when visiting Melbourne for a conference, the 2013 Study revealed that 28% of national delegates visited regional Victoria alone. For those delegates that had the opportunity to visit regional Victoria, the majority (55%) visited the Great Ocean Road (up by 20%). Delegates from the Northern Territory were more likely to visit regional Victorian destinations, although delegates that reside in Queensland were likely to visit for a longer period of time.

28%

VISITED REGIONAL VICTORIA BEFORE OR AFTER THE CONFERENCE



6. EXPENDITURE

EXPENDITURE PER TRIP

How much have you spent or do you intend to spend on yourself and others on the following items? Base n= 703 (multiple response)

Per Trip in Melbourne	Amount
Accommodation	\$903
Registration	\$737
Domestic air travel	\$480
Shopping	\$381
Dining out/restaurants	\$302
Tours	\$226
Recreational activities	\$170
Theatre/concert/cinemas	\$137
Ground transport	\$94
Phone/internet	\$59
Other	\$465
Total	\$3,953

On average, national delegates spent \$3,953 during their stay in Melbourne. This figure has risen by \$609 from the 2010 Study, representing an 18% increase. This growth is due to an increase in spending on all but one item, with the major contributors including accommodation (up by \$137), shopping (up by \$110), and tours (up by \$91). The only figure that has seen a reduction is conference registration costs (down by \$86).

EXPENDITURE PER DAY

How much have you spent or do you intend to spend on yourself and others on the following items? Base n= 559 (multiple response)

Per Day in Melbourne	Amount
Accommodation	\$193
Registration	\$178
Domestic air travel	\$104
Shopping	\$83
Dining out/restaurants	\$71
Tours	\$51
Recreational activities	\$36
Theatre/concert/cinemas	\$29
Ground transport	\$23
Phone/internet	\$14
Other	\$178
Total	\$959

The average expenditure per day for national delegates has seen a 35% increase from the 2010 Study, with a daily spend of \$959. The major items that contributed to the increase in daily spend were accommodation (up by \$36), shopping (up by \$27), and dining out/restaurants (up by \$20).

\$959 DELEGATES SPENT
IN MELBOURNE PER DAY

35% INCREASE IN DAILY SPEND
FROM THE 2010 STUDY

7. SATISFACTION WITH MELBOURNE

INFLUENCE ON VISITING MELBOURNE

48%

Would you have visited Melbourne within the next 12–18 months for a holiday if this conference wasn't held here? (interstate delegates only) Base n= 465 (single response)

Almost half (48%) of national delegates stated that if the conference was not held in Melbourne they would not have visited for a holiday in the next 12 to 18 months.

WILL RETURN FOR A HOLIDAY IN MELBOURNE

94%

In the next five years, do you think you might return to Melbourne to visit for a holiday? (interstate delegates only) Base n= 479 (single response)

More than nine out of every 10 national delegates (94%) intend on returning to Melbourne for a holiday. Delegates that reside in Tasmania (100%) and the Australian Capital Territory (98%) have shown the highest level of interest.

LIKELIHOOD OF RECOMMENDING MELBOURNE

98%

Would you recommend Melbourne as a place to visit to your friends/colleagues? Base n= 480 (single response)

After visiting Melbourne to attend a conference, almost all national delegates (98%) would recommend it to their family and colleagues as a place to visit.

MELBOURNE ATTRIBUTES

How satisfied are you with the following in Melbourne? Base n= 471 (single response)

Melbourne's shopping has continued to impress, with national delegates singling out the city's shopping variety as the most satisfying attribute (rating 4.3 out of 5). Consistent with the 2010 Study, Melbourne's convention facilities and safety also received high satisfaction ratings (rating 4.2 out of 5).

MELBOURNE ATTRACTIONS

How satisfied are you with Melbourne's attractions and highlights? Base n= 404 (single response)

National delegates were pleased with Melbourne's shopping and hospitality attractions, selecting South Wharf Promenade, the central shopping district and Queen Victoria Market as the most satisfying attractions (all rating 4.2 out of 5).

MELBOURNE ACTIVITIES

Will you do any of the following whilst in Melbourne? Base n= 724 (multiple response)

Go shopping	65%
Experience the bars, entertainment and nightlife	49%
Explore the precincts and laneways	39%
Visit parks and gardens	32%
Visit galleries/museums	24%
Attend events (i.e. festivals, cultural, sports)	19%
Attend theatre/performances/concerts	11%

93% of national delegates indicated they participated in activities throughout Melbourne while on their trip. As with international delegates, shopping was found to be the most popular activity for national delegates (65%). Other popular activities included discovering Melbourne's bars, entertainment and nightlife (49%), as well as exploring the various precincts and laneways (39%).



APPENDIX 1:

REGIONAL DEFINITIONS

Delegates were asked to state their country of residence, which was categorised into world regions for ease of data analysis and interpretation.

The following table outlines the countries within in each world region.

Region of Residence	Countries
Australia	Australia
Asia	Bangladesh, Cambodia, China, Hong Kong, India, Indonesia, Japan, Kazakhstan, Korea, Laos, Macau, Malaysia, Maldives, Myanmar, Nepal, Oman, Pakistan, Philippines, Singapore, Sri Lanka, Taiwan, Thailand, Timor, Vietnam
South Pacific	Fiji, Kiribati, Nauru, New Zealand, Papua New Guinea, Samoa, Tonga
Middle East	Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Palestine, Qatar, Saudi Arabia, Turkey, United Arab Emirates
Africa	Angola, Botswana, Burkina Faso, Burundi, Cameroon, Ethiopia, Gambia, Ghana, Ivory Coast, Kenya, Lesotho, Libya, Malawi, Mali, Mauritius, Mozambique, Namibia, Nigeria, Reunion Island, Rwanda, Senegal, Seychelles, South Africa, Sudan, Swaziland, Togo, Tunisia, Uganda, Zambia, Zimbabwe
Eastern Europe	Albania, Azerbaijan, Belarus, Bosnia, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Kosovo, Latvia, Lithuania, Macedonia, Moldova, Poland, Romania, Russia, Serbia, Slovenia, Ukraine, Uzbekistan
Western Europe	Austria, Belgium, Denmark, Faroe Islands, Finland, France, Germany, Greece, Iceland, Italy, Malta, Monaco, Morocco, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland
North America	Bahamas, Barbados, Bermuda, Canada, Jamaica, Mexico, Trinidad, United States of America
South America	Anguilla, Antigua, Argentina, Aruba, Bolivia, Brazil, Chile, Colombia, Cuba, Curacao, Dominican Republic, Ecuador, Guatemala, Guyana, Montserrat, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, Saint Lucia, Suriname, Venezuela
UK & Ireland	England, Ireland, Scotland, Wales

APPENDIX 2:

DELEGATE EXPENDITURE CALCULATIONS

Delegates were asked to report all expenses incurred in, or travelling to, Melbourne, regional Victoria and/or other parts of Australia (excluding international airfares), including all amounts paid before leaving home and all amounts charged to credit cards. This included amounts paid for by an employer/sponsor on the delegates' behalf. Delegates completed the questionnaire prior to the completion of their trip which required some estimation, however this is likely to have been an underestimation rather than an overestimation as we advise respondents to err on the side of caution.

AFS performed the expenditure calculations on behalf of the MCB. When calculating the average spend per item, delegates were omitted if they provided answers in another currency but did not specify which currency. If delegates reported expenditure in a specified foreign currency, this was converted to Australian dollars in accordance with the Australian Taxation Office exchange rates at the time the questionnaire was completed. All expenditure figures reported are in Australian dollars.

The average amount spent on each item was calculated by dividing the number of delegates who responded to the question by the total amount reported as being spent. All items across each category were totalled to get a mean total spend per delegate per trip; this includes each category of spending. When calculating total mean spend per day, delegates who did not specify how many nights they spent in Melbourne were omitted from the analysis. The average amount spent per day per delegate was calculated to get a mean spend per day per item. Each expenditure item was totalled to give a mean per day spend.

LIMITATIONS

It should be noted that delegates only came from limited industry types (namely medical and scientific) and therefore expenditure results may be impacted. Given the business events selected were confined to MCEC, the results should be interpreted with caution.

MELBOURNE CONVENTION BUREAU OFFICES

Melbourne - Head Office

Level 12 IBM Centre
60 City Road
Southbank Victoria 3006
Australia
T +61 3 9693 3333
info@melbournecb.com.au

London

Victoria House at the Australia Centre
Corner of Melbourne Place & Strand
London WC2B 4LG
United Kingdom
T +44 (0) 20 7836 7766
europe@melbournecb.com.au

New York

Myriad Marketing
20 West 22nd Street, Suite 603
New York City, NY 10010 USA
T + 1 212-206-7632
northamerica@melbournecb.com.au

Shanghai

Shanghai Centre
Suite 620, 1376 Nanjing Road (West)
Shanghai, 200040, PR China
T +86 21 6279 8681
shanghai@melbournecb.com.au

Singapore

101 Thomson Road
United Square #08-01
Singapore 307591
T +65 6356 8639
singapore@melbournecb.com.au

melbournecb.com.au

