Strategic Planning and Management in the MICE sector – A Case study of the Auckland Region

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Abstract

Tourism is a vital part of the economy in New Zealand, and is currently the country's second biggest export earner (Ministry of Economic Development, 2011). The Meetings, Incentives, Conventions and Exhibitions (MICE) sector is an important aspect of the tourism industry within the Auckland region, New Zealand's largest city. This thesis investigates the MICE sector in Auckland, an area that had largely been unexplored in the academic literature. MICE visitors are acknowledged as highly beneficial for destinations. They are commonly viewed as being high yield visitors, with minimal negative environmental and socio-cultural impact (Dwyer, 2002; Lau, Milne, & Johnston, 2005; Weber & Ladkin, 2004). They can also assist in overcoming issues related to seasonality within destinations (Rogers, 2003). Currently the proportion of visitors to the region attending MICE events is quite small at around 2% (Tourism strategy Group - Ministry of Economic Development, 2011a, 2011b).

At the commencement of this research two important documents, the New Zealand Tourism Strategy 2015 and the Auckland Regional Economic Development Plan, both identified further development of the MICE sector in Auckland as being desirable (Auckland Regional Council, 2006b; Tourism Strategy Group, 2003; Zahra, 2011). At that time there was limited information regarding the sector, its structure and composition, the trends and issues that were affecting it, or regarding patterns of MICE visitation. Similarly no strategic forward planning had been conducted for the sector. The body responsible for tourism promotion and destination management at the time, Tourism Auckland, were aware of this lack of information, and during initial consultations with the researcher also expressed a desire to develop a strategy specifically for the MICE sector moving forward. Accordingly the initial goal for this research was to provide Tourism Auckland with a platform of information on which they could base the development of a strategy document.

Over the duration of this research investigation the Auckland region has been through a considerable change in governance structures. Where there had previously been seven city and district councils (Auckland Regional Council, 2007b), along with one regional council, there is now one unitary body, the Auckland Council (Auckland City Council, 2010). With this change in governance structure has been the abolition of Tourism Auckland and the formation of a new council controlled organisation responsible for tourism in the region, Auckland Tourism, Events and Economic Development (ATEED) (Auckland Council, 2011b). While this has certainly impacted on the initial goal of this research to provide Tourism Auckland with a platform on which to base a strategic planning process, it has not negated the value of this research. This research provides a solid case study of the MICE sector in Auckland, and makes a compelling case for why ATEED, should implement a strategic planning process specifically for the MICE sector in the region.

Adopting a pragmatic approach to this thesis, the first steps in this investigation were to determine what the research needed to discover in order to provide the desired platform of information for Tourism Auckland. Therefore the literature review was focussed on three main aspects: 1) the specific context of the MICE sector in the Auckland region; 2) previous studies of the MICE sector in other regions; and 3) concepts of sustainability and strategic planning and how they are applied in a New Zealand context. The result of this was the development of framework for the collection of data from various sources, which could then be used to develop a situational analysis of the MICE sector in Auckland. This framework is detailed in the methodology chapter of this thesis.

This thesis employed a mixed methods approach and data was collected in two phases. A combination of questionnaire surveys and interviews were used in the initial data collection phase. Data were sought from five separate populations (delegates, exhibitors, event organisers, suppliers and venues) representing both the supply and demand sides of the sector, with questionnaires being employed for the demand side and interviews for the supply side. Analysis of interview data was conducted with the aid of three software applications; Catpac, Leximancer and Atlas Ti, while the data analysis for the questionnaires used Statistica. The findings from these analyses were triangulated to conduct an initial situational analysis for the sector. In the second phase of the data collection the Delphi technique was employed, to confirm the factors identified in the initial situational analysis, and to assess levels of and build consensus around these factors. The Delphi panel comprised 13 first phase participants, representing a variety of venues and suppliers from around the region. This Delphi process was successful in achieving consensus on most of the factors previously identified, and therefore allowed for a revised situational analysis to be developed.

Although the Delphi process was successful in achieving consensus in most areas, there was one area where consensus was not achieved and this was in relation to the desired future position of the Auckland MICE sector. This research found that there is in fact, dichotomous views regarding the future of MICE in the region. Discussion of this key finding and its implications forms the first part of the final chapter of this thesis. The following parts of the chapter explore the key findings resulting from the situational analysis. This investigation concluded that the region does have some considerable strengths that can be capitalised upon to increase the number of MICE visitors to the region, these being the chiefly that the region offers a diverse range of natural and built environments, a good selection of venues and supporting suppliers, and that is well connected via the Auckland International Airport and the road network within New Zealand. However, despite these strengths, the region also has some weaknesses that need to be addressed if the sector is to reach its full potential. These weaknesses stem from a lack of overall strategic leadership for the sector, and this has manifested as intense competition between individual businesses in the region, very little collaboration between stakeholders and a lack of a unified and compelling marketing message being used to attract MICE business to the region. Overcoming these weaknesses presents a significant challenge for the region, but by the same token also provide the sector with a significant opportunity to increase the number of MICE events held in the region. Other challenges the sector faces are the result of the geographic distance of Auckland from the large MICE generating markets of Europe and North America, and the global economic climate following the economic crisis of 2008.

In order to overcome these challenges a planned strategic approach will be necessary. The final section of this thesis proposes a framework that ATEED could use to implement strategic planning for the sector. This is then followed by a series of recommendations to ATEED regarding the above mentioned findings, and the importance of them taking a leadership role for the sector and ensuring stakeholder involvement in any strategic planning process. This thesis concludes by stressing the importance of developing a strategic plan for ensuring the Auckland MICE sector achieves its full potential.

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List of Acronyms

ACB	Auckland Convention Bureau
ACC	Auckland City Council
ARC	Auckland Regional Council
ATEED	Auckland Tourism, Events and Economic Development Ltd
A/V	Audio/visual
BTA	Business Tourism Auckland
CAS	Convention Activity Survey
CDS	Convention Delegate Survey
CINZ	Conventions and Incentives New Zealand
DMC	Destination Management Company
DTS	Domestic Travel Survey

ITO	Inbound Tour Operator
IVS	International Visitor Survey
MICE	Meetings, Incentives, Convention and Exhibitions
NBES	National Business Events Study
PCO	Professional Conference Organisers
RTO	Regional Tourism Organisation
STCRC	Sustainable Tourism Cooperative Research Centre
UNWTO	United Nations World Tourism Organisation

Chapter 1 – Introduction

1.1 Background to the thesis

The subject of this thesis is the Meetings, Incentives, Conventions and Exhibitions (MICE) sector in the Auckland region of New Zealand. While the MICE sector is only a one part of the tourism industry, it is a highly desirable part to develop. The MICE sector is widely acknowledged to be a high yield component of the tourism industry (Dwyer, 2002; Lau, Milne, & Johnston, 2005; Weber & Ladkin, 2004). MICE travellers generally have greater spending power than other travellers, spending around twice as much per day as other types of travellers (Rogers, 2003). During 2003 international MICE visitors to Australia spent on average $483 per day, over 5 times the amount of other visitors, enabling their total expenditure to reach an average of nearly $1000 more per trip than other visitors (Deery, Jago, Fredline, & Dwyer, 2005).

While specific information regarding expenditure of MICE travellers for New Zealand is not readily available, the figures for business travellers in general can be obtained from the Tourism Strategy Group’s database via its research website (www.tourismresearch.govt.nz). The figures show that international visitors, whose primary purpose of visit is business, spent on average $175 per day in the year ended 30 June 2010. This is substantially more than the average spend of $117 per night for all visitor types (Tourism Strategy Group - Ministry of Economic Development, 2010a) .

MICE visitors are also desirable due to their ability to assist in overcoming issues related to seasonality of demand (Rogers, 2003). Within the Auckland region the peak season for visitor arrivals is over the summer months. International MICE visitation to New Zealand peaks during the Spring and Autumn shoulder seasons (Tourism Auckland, 2007b). It is also considered as a lower negative impact type of tourism, primarily because convention tourists often travel together, hence minimising congestion and pollution. They are also easy to access in order to provide education about how best to maximise enjoyment of their stay while causing minimal disruption to the host community and environment (Rogers, 2003).

There is certainly support amongst stakeholders for increasing the number of MICE events and attendees at these events in the Auckland region. The National Government's June 2011 announcement, namely that it has entered into negotiations with Sky City, to construct a 3500 person capacity in the Auckland CBD (Wray, 2011), clearly demonstrates the government's desire for this to occur. However, as will be shown in this thesis, construction of a new convention centre in the region will not necessarily be enough to ensure sustainable development of the Auckland MICE sector.

Prior to this research being undertaken, little was known about the structure of the sector, patterns of visitors for MICE purposes or the issues and trends of the Auckland region. Similarly, there has been no formal strategic planning undertaken for the sector. Without informed forward planning it is unlikely that the sector will meet its full potential. This issue was acknowledged by Graeme Osborne, the former CEO of the now defunct Tourism Auckland when an initial proposal for this research was presented to him in June 2008. This initial proposal outlined the underlying research questions to be answered as being:

> *Who are the key stakeholders in the Auckland MICE sector, and what are their goals and objectives?*

And

How are they contributing to shaping the future of the sector?

It was anticipated that answering these questions would fill the gap in the knowledge regarding the sector and generate a baseline of information that could then be used by Tourism Auckland to undertake this planning. This proposal was accepted by Tourism Auckland, and support made available to researcher. As the research progressed it became apparent that there was a third underlying research question and that is: *How can the implementation of strategic planning and management assist the sector in achieving 'industry best practice' sustainable development?*

Accordingly the specific objectives for this research were defined as:

1. To develop a clear understanding of the current state of the Meetings, Incentives, Conventions and Exhibitions (MICE) sector in the Auckland region, including who the key stakeholders are, what roles these stakeholders are playing and the nature of the relationships and power structures that exist in the sector.
2. To understand trends occurring in the sector from both the supply and demand perspectives.
3. To enhance understanding of the link between strategic planning and sustainability.
4. To forecast the likely development of the sector with reference to Auckland.
5. To identify aspects of the sector that require further development in order to meet demand.
6. To assess if a consensus exists within the sector that a strategic approach to development is required in order to maximise opportunities and ensure long term sustainability.

7. To propose a planning and management structure that allows for on-going strategic development of the sector based on the data gathered from various stakeholders.

This research design employed to achieve these objectives was pragmatically driven. In the early stages of the research it was identified that in order to obtain a complete picture of the Auckland MICE sector information would need to be gathered from a diverse range of sources. This resulted in a mixed methods approach being adopted, whereby the method of data collection and analysis was selected based on the likelihood of producing useable data from a particular group of informants.

The end result of this research has been a comprehensive case study of the MICE sector in the Auckland region. This case study draws on stakeholder and network theories to explain the current state of the MICE sector. The sector's composition and the relationships between stakeholders are identified, along with the nature of stakeholders' involvement in the sector and the role various stakeholders are currently playing in shaping the future of the sector. This is then further developed to identify the current strengths and weaknesses of the sector. This case study also identifies the trends and issues that are currently impacting on the sector, and provides insight into the opportunities and challenges the sector is likely to face in the future.

The original intention of this case study was to submit a situational analysis to Tourism Auckland, who would then use this as the basis of developing a strategic plan for the region. As Tourism Auckland no longer exists as an organisation, there is now Auckland Tourism, Events and Economic Development (ATEED) who have taken over the responsibilities of Tourism Auckland. The final section of this thesis argues that, if the Auckland MICE sector is to be developed in a sustainable manner that will meet the needs of all stakeholders, then formal consultative strategic planning must occur. Further to this, the thesis proposes a structure and a series of recommendations that ATEED could adopt should they elect to engage in strategic planning for the MICE sector in the region.

1.2 Structure of the thesis

The thesis is structured in nine chapters. This first chapter provides an introduction to the research. It provides a background to the research and the reasons for undertaking this research. The significance of the findings of this research, both conceptually and practically are also briefly described.

Chapter 2 is the first of three chapters reviewing the literature relevant to this study. This chapter is focussed on the Auckland region. The chapter begins by describing the region, its location and the importance of tourism generally and MICE specifically for the region. The chapter outlines the system of governance that was in place during the course of this research and the significant changes that have recently taken place and associated impacts on tourism. The national and local government’s desired strategic directions for the region make up the final section of this chapter.

Chapter 3 provides the theoretical underpinning to this thesis by reviewing the literature on the topics of sustainability and strategic planning. The chapter begins by defining sustainability and how the term is interpreted in a New Zealand context. The next section of the chapter examines the role of strategic planning and management in encouraging long term sustainability. The third section addresses the literature regarding strategic planning frameworks, and the process of strategic planning. The final section of this chapter examines the concept of strategic planning. Within this discussion two key areas of theory are reviewed;

namely stakeholder and network theories. The relevance of these theories in the context of this thesis is also explored.

Chapter 4 specifically addresses the literature surrounding the MICE sector. The first part of this chapter defines the sector. This is followed by discussion of the various components that make up the sector. This includes defining the organisations that make up the supply side of the sector, as well as the profile of MICE participants. Purchase processes, motivators and drivers of satisfaction are also addressed. This chapter then moves on to look at the key trends and issues reported in the literature that are affecting the sector at this point in time.

Chapter 5 addresses the methodology that was employed in this research. The chapter begins with a discussion of the theoretical underpinnings of this research. A pragmatic stance was adopted when designing this research investigation, leading to a mixed methods approach. The research was also designed around two phases, initially the collection of information, where the post positivism paradigm was most evident. The second phase was ordering and building consensus, and a constructionist paradigm became dominant. Both these paradigms are discussed, before moving on to describe the specific data collection methods. The first phase used a combination of questionnaire surveys and semi-structured interviews to gather information, while the second phase employed the Delphi technique. These methods and how the resulting data were analysed make up the second part of chapter five.

Chapter 6 reports the findings from the interviews that were conducted in phase one of the research. These interviews were conducted with representatives of organisations that are considered to be on the supply side of the sector. A total of 41 interviews were conducted, with 30 of these being with representatives of MICE venues in the Auckland region. Content analysis, with the aid of Atlas Ti v6, was used to analyse these interviews, with venue and other suppliers considered as separate groups. The findings from each group are discussed separately before being brought together to develop an initial situational analysis for the MICE sector in the Auckland region.

Building on Chapter 6, **Chapter 7** reports on the findings from the questionnaire based surveys that were gathered during the first phase of the research. Event organisers, attendees at events and exhibitors were surveyed and responses were analysed with the aid of Statistica v9. Like the previous chapter the findings for each population group are presented separately. These findings are then triangulated with the findings from the interviews in order to confirm and update the initial situational analysis.

Chapter 8 reports the findings from the second phase of this research. The phase aimed to confirm the previous findings in relation to the situational analysis, and also to assess and build consensus amongst key sector stakeholders as to the content of the situational analysis. The Delphi technique was utilised to achieve these purposes, and a panel of 13 participated in three rounds. This chapter reports first on the levels of consensus and how they developed during the three rounds, before going on to report the final set of findings in relation to the situational analysis for Auckland's MICE sector.

The final chapter, **Chapter 9**, presents the key findings of this research and outlines the theoretical and practical contributions this thesis has made. This is followed by a discussion of the limitations of this study and identification of areas for future research. The final section of this chapter summarises the recommendations that will be made as a result of this research.

Chapter 2 –

The Auckland Region, Tourism and the MICE Sector

2.1 Introduction

Auckland, located in the upper North Island, is New Zealand's largest city and is the economic hub of New Zealand. The region stretches from Warkworth in the North to Pukekohe in the South and borders the Hauraki Gulf in the East and the Tasman Sea in the West. This diverse region is home to 1.37 million people or one third of the total population of New Zealand (Auckland Regional Council, 2009).

Tourism is a significant part of the economy in the Auckland region, and while MICE related tourism currently only accounts for a small proportion of the total numbers of visitors they are regarded as highly desirable for a number of reasons. These reasons, discussed in detail in this chapter, include the high yield nature of MICE tourism and the ability of MICE tourism to overcome issues of seasonality.

During the course of this research project major changes have been implemented in the system of local governance in the region. From November 2010, the region has moved from a system of governance that included seven separate district and city councils and one regional council, to one single council body representing the region as a whole (Auckland City Council, 2010). This is a major change for the region and obviously has implications for bodies involved in managing and promoting tourism in the region.

The purpose of this chapter is to introduce the region and contextualise the environment in which this research was undertaken. The first part of this chapter provides an introduction to the region and the system of local governance including the changes that have occurred. This is followed by a discussion of tourism in the region, the importance of tourism to the region and the significance and desirability of MICE events. The next part of this chapter examines the sources of information that were available regarding MICE events in the region during the course of this project.

The final part of this chapter looks at the long term planning that is occurring for the region. Specifically, this part addresses the Auckland council's desire for Auckland to be considered a 'world' city. The concept of a world city is defined, and this is compared to the current day Auckland. The implications for the MICE sector as Auckland moves towards this goal are also discussed.

2.2 Tourism, the Auckland region and the MICE sector

The situation of local governance in the Auckland region prior to November 2010 meant that there was no unitary council with overall responsibility for the region. The Auckland region comprised 4 city councils; Auckland, Manukau, North Shore and Waitakere, and 3 district councils; Franklin, Rodney and Papakura (Auckland Regional Council, 2007b). A map showing each of these councils' boundaries is shown in figure 2.1. The Auckland Regional Council, while representing the region as whole, had limited responsibilities of managing the region's air and water quality, regional parks, the coastal and marine environment, and natural and cultural heritage sites. Along with this the regional council also managed public transport and the region's growth and development (Auckland Regional Council, 2007a).

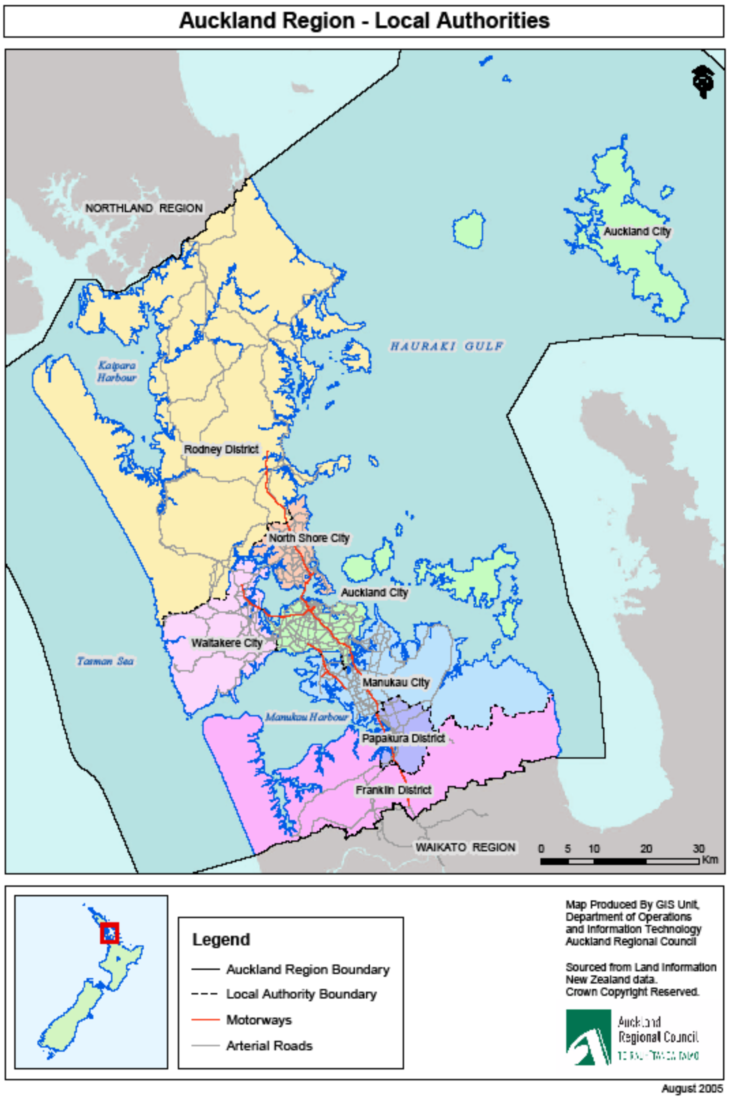

Figure 2.1 The Auckland Region (Source - Auckland Regional Council, 2005)

The Auckland RTO, Tourism Auckland, was responsible for developing and promoting the Auckland region as a tourist destination, both internationally and domestically (Tourism Auckland, n.d.), but neither the city nor the regional councils had a specific tourism strategy. On the other hand the Auckland region did have in place a regional economic development strategy, which included several key objectives relevant to tourism. The economic development strategy was being implemented through the Metro Project, and this implementation was coordinated by Auckland Plus, a division of the Auckland Regional

Council (Auckland Regional Council, 2006a). Objective 3 of this strategy was to transform Auckland into a world class visitor destination. In order to achieve this objective a regional major events strategy was developed along with a regional visitor plan (Auckland Regional Council, 2006c).

2.2.1 The Auckland Council

The National Government elected in 2008 introduced reforms that have led to a significant change in the way in which the Auckland region is governed. From the 1st November 2010, following local government elections, the Auckland regional council, 3 district councils and 4 city councils were merged to form a single body, the Auckland Council (Auckland City Council, 2010). This has had implications for tourism planning, management and promotion in the region. Instead of each district and city council having their own business units for managing these function, with Tourism Auckland also involved, there is now one council controlled organisation responsible for tourism across the region. This body ‘Auckland Tourism, Events and Economic Development Ltd.’ replaces the previous structure, and includes economic development in the same portfolio as tourism and events. In addition the business unit of Tourism Auckland named ‘Business Tourism Auckland’ is renamed as the ‘Auckland Convention Bureau’(Auckland Council, 2011b).

The functions of Auckland Tourism, Events and Economic Development Ltd. (ATEED) include but are not limited to: destination marketing and management; advocacy and industry liaison; event strategies, attraction, funding, coordination and facilitation; event research; young enterprise schemes, facilitating investment in the region; business mentoring and coaching; and business sector development. In order to deliver these function ATEED was initially divided into three business units. The first of these the ‘Tourism Group’ essentially took on the roles that were previously performed by Tourism Auckland. The second unit the 'Events Group' was an amalgamation of the events teams that previously existed in each of the city and district councils. They were specifically tasked with attracting major events, along facilitating and coordinating existing events occurring in the region. The third business unit, the 'Economic Development Group', was focussed on business development and specific sector development within the region (Auckland Council, 2011b).

The initial Chief Executive Officer of ATEED was Mr Michael Redman, who came to the attention of the tourism industry by espousing an events led tourism policy when he was elected Mayor of Hamilton City Council. Michael Redman later resigned as Mayor and took up the position of CEO of Hamilton City Council. He resigned from his position with ATEED on 28th October 2011 after the release of an Audit New Zealand report into the failed V8 Supercar race, the ITM400. This report was extremely critical of the role Redman had played in bringing the race to Hamilton, which has ultimately cost Hamilton City Council somewhere in the region of $39 million.

Prior to his resignation, Mr Redman was driving an event based strategy for the Auckland region. At an industry meeting in April 2011 Michael Redman identified a number of drivers for his policy that are summarised in Figure 2.2 in the development of a portfolio driven series of events for Auckland.

To that end, while hosting the Rugby World Cup in 2011 was obviously important, of a greater necessity is the development of a portfolio of repeating annual events of both international and domestic significance. Current domestic events identified as being important include the Pasifika Arts Festival, but it was stated that what was desired was an event equivalent to the Melbourne Cup. Mr Redmond stated an objective of having by 2020 four domestic anchor events in addition to four international anchor events that would generate a net benefit to the Auckland economy of NZ$80 million, and promised that an announcement of the first such international event would be made prior to April 2012.

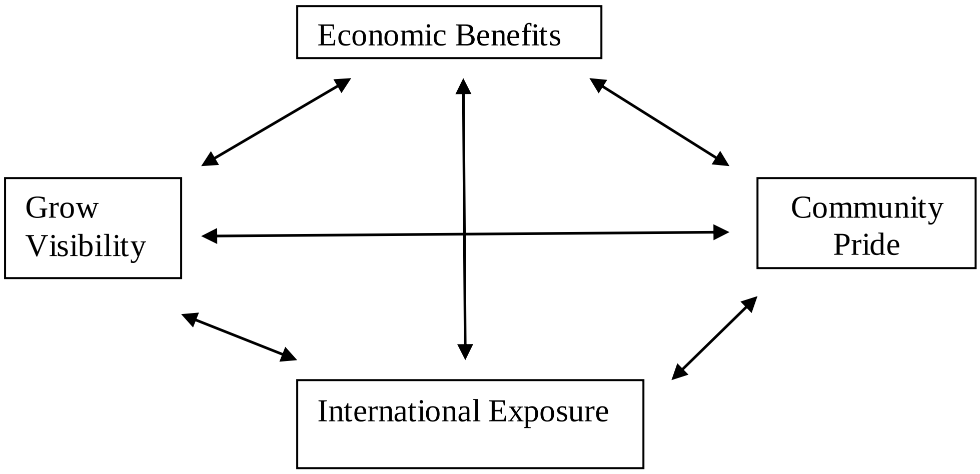

Figure 2.2 - ATEED Policy Drivers for Auckland MICE

The desired attributes of domestic anchor events would be that they are (a) distinctly Auckland, (b) made in Auckland, (c), be regular, (d) possessing an ability to leverage off events and to align them to the wider objectives of ATEED and (e) possessing a legacy for the city, an example of the last being the impact of the Rugby World Cup on the waterfront development of Auckland.

The current CEO of ATEED is Mr Brett O'Riley, appointed in May 2012. ATEED has also been restructured into four business groups: Business and Sector Development; Business Planning and Performance; Marketing and Communication; and Destination. The destination group is then further divided into three teams: Major Events; Tourism; and Attraction and Commercial Partnerships (Auckland Tourism Events and Economic Development Ltd, 2012).

It is important to note that this change in governance structure occurred after the data collection for this research was complete. As will be seen in later chapters, particularly six and nine, the expected impact of this change was a topic of interest amongst research participants, and as result this change is important to the discussion in the final chapter of this thesis. It can also be noted that at the time of finalising this thesis ATEED has continued to attract criticism, for in July 2012 it became known that the Auckland Council had approved the expenditure of NZ$10.2 million for hosting the Australian V8 Super Saloon Championship at Pukekohe Race Track without ATEED having provided full details of anticipated expenditures and revenues, with allegations being made in the press that such estimates were overly optimistic.

2.2.2 Tourism in New Zealand

The Tourism industry is a vital part of the New Zealand economy. With reference to the labour force, 9.2% of all employment is related to tourism and the industry contributes approximately 9% of the country's Gross Domestic Product (Ministry of Economic Development, 2011). International visitation makes up over 40% of all tourism expenditure and as a result tourism is one of New Zealand's largest export earners. In the year ended March 2011 it accounted for 18.5% of all exports (Ministry of Economic Development, 2011). For much of the period 1990 to 2008 tourism was the single largest source of foreign exchange earnings, but with the global financial crisis starting in 2008, and the 12 months to April 2011 seeing a small decline in total visitor numbers, the dairy industry was, at least for a time, able to reclaim the number one position as New Zealand's largest export earner.

Although tourism is an important contributor to the national economy, from a global perspective, New Zealand is quite a small player in the tourism arena. In the year ended 31st December 2010 New Zealand received just over 2.5 million international visitors (Tourism Strategy Group - Ministry of Economic Development, 2011c). Globally for the same period there were over 940 million international visitor arrivals (United Nations World Tourism Organisation, 2011), giving New Zealand about a 0.25% share of all international visitor arrivals. In terms of export earnings, New Zealand did slightly better receiving NZ$5.6 billion in export earnings (Tourism Strategy Group - Ministry of Economic Development, 2011d) which, using the average exchange rate of 1.388 for 2010 (Inland Revenue Service - United States Department of Treasury, 2011), equates to a little over US$4 billion. Total export earnings globally were US$919 billion (United Nations World Tourism Organisation, 2011), meaning New Zealand received about 0.44% of total global tourism export earnings.

2.2.3 Tourism in Auckland region

Tourism is certainly seen as significant within the Auckland region with nearly 70% of all international visitors to New Zealand travelling through Auckland and the region boasting several major visitor attractions in addition to hosting one-off events such as the semi-finals and final of the Rugby World Cup 2011 (Tourism New Zealand, 2007) and hosting regular sporting and cultural events such as the ASB Tennis Classic and the Pasifika Arts Festival. The year ending 31st December 2010 saw 1.72 million international visitors arrive in Auckland and the year ending 30th September 2010 saw 1.73 million international visitors and 1.72 million domestic visitors stay overnight in the Auckland region (Tourism Auckland, 2011). Historically Auckland also receives a significant number of day visitors to the region, with 7 million domestic day visits to the region during the year ending 30th June 2006. Total visitor spend in the region for the same period was $3.75 billion (Svehla, 2007).

As a destination Auckland offers a range of services and experiences to visitors. The central business district offers a vast array of accommodation and dining options, and provides many of the experiences commonly associated with urban tourism, such as shopping and creative arts performances (Ashworth & Page, 2011) and a developed waterfront zone of restaurants and bars. In contrast the outer areas of the region boast access to unspoilt beaches, and undeveloped bush land and offer opportunities for a vast array of nature based experiences. Access to the harbours and the Hauraki Gulf gave the city its former branding of 'The City of Sails'.

Ryan and Cave (2005), in examining Auckland destination image, found significant differences in perception of the destination between the domestic and international markets. They found that the domestic market tended to be more critical of Auckland, noting items like traffic congestion and using terms like 'busy' and 'brash'. International visitors tended to see Auckland a relaxing friendly escape from the rest of the world. These findings are of importance to this thesis due to the high proportion of domestic visitors, and MICE visitors (as discussed later in this chapter) to the region.

2.2.4 MICE in the Auckland Region

The MICE sector is thus an important part of this large and diverse industry. While there is limited information available on the exact proportion of tourism expenditure attributable to the MICE sector, the information available indicates that it is making a significant contribution. During the 12 month period ending 31 December 2010, 52, 212 international visitors (2% of all international visitors) were recorded as having attended a convention or conference during their visit to New Zealand (Tourism strategy Group - Ministry of Economic Development, 2010b).

The findings from the Convention Activity Survey show that within the Auckland region an estimated total of 12,840 MICE events were hosted in the year ended 31st December 2010. This resulted in a total of approximately 1,105,047 delegates attending events and an approximate total number of delegate days of 1,399,398. Of these delegate days the vast majority were New Zealanders with nearly 96% of all delegate days coming from the domestic market (Covec, 2010a). Unfortunately this data does not specify what proportion of these delegate days are as the result of visitors to the region, however findings from the Domestic Travel Survey and International Visitor Survey show that approximately 2% of all visitors attend a conference or convention during their visit to the Auckland region (Tourism strategy Group - Ministry of Economic Development, 2011a, 2011b). Despite the relatively small proportion of MICE visitors to the region, MICE visitors are still regarded as important for the region, as will be demonstrated in this thesis.

2.3 Current sources of MICE information and statistics for Auckland

As previously mentioned, there are at the time of writing, few sources of information regarding the MICE sector in the Auckland region. The sources that are available are described below.

2.3.1 International Visitor Survey (IVS) and Domestic Travel Survey (DTS)

The IVS and DTS conducted by the Tourism Strategy Group, Ministry of Economic Development share a common purpose of providing quarterly information on the characteristics, behaviour and expenditure of travellers within New Zealand (Ministry of

Tourism, 2008a, 2008b). The information from both surveys can be broken down on a regional basis and therefore can be used to provide information regarding MICE visitors numbers, expenditure and length of stay for the Auckland region. That said, without access to a disaggregated data set, the most relevant data that can be obtained via the Tourism Strategy Group's website is the numbers of visitor to the region participating in MICE events and the sources of international MICE visitors, the overwhelming majority of whom come from Australia.

2.3.2 Convention Activity Survey

The convention activity survey was until mid 2009, an ongoing monthly survey of about 100 venues around New Zealand. This survey was managed by Angus and Associates on behalf of the regional convention bureaux (Angus and Associates, 2008). To the best of the author's knowledge the data collected in this survey was then extrapolated to produce estimated basic statistics for each region including number of meetings held, number of attendees and occupancy rates for particular venues.

The survey was upgraded in 2009 to include an improved measuring system and a greater number of participating venues (Ministry of Tourism, 2009). An additional programme, the Convention Delegate Survey has also been developed, which utilises an online questionnaire to collect data regarding economic contribution from delegates (Covec, 2010b). Both programmes are being managed by the research and consultancy company, Covec, and reports are published on the Tourism Strategy Group's website (Ministry of Tourism, 2009).

2.3.3 Auckland Convention Bureau Database

Convention Bureau databases contain a wealth of information regarding the organisations that are members of the bureau. Some of this information is publicly available via websites. For example, the Auckland Convention Bureau contains a list of venues within the Auckland region. For each venue listed a photograph, brief description and contact details are provided (Tourism Auckland, 2008). The Auckland Convention Bureau database was an invaluable tool for this research investigation, as it provided an excellent starting point for identifying target populations on the supply side of the sector.

2.4 The Future of Auckland – A World City?

One of the key tasks for the newly formed Auckland Council is to develop a long term plan for the region. This process is underway, and April 2011 saw the release of ‘Auckland Unleashed – The Auckland Plan Discussion Document’ (Auckland Council, 2011a). In this document the council outlined the mayoral vision for the city to be the world’s most liveable city and identified nine key goals for the region to reach by the year 2040. One of these key goals is for Auckland to be an “outward-looking global city with a productive, high-value economy, supported by a world-class international city centre” (Auckland Council, 2011c, p. 13).

As Auckland is aiming to be a global or ‘world’ city within the next 30 years, it is important in the context of this thesis to examine what constitutes a world city and what does this mean in relation to the MICE sector. The idea of a global city has been around since the early 1990’s and was first termed by sociologist, Saskia Sassen, in her 1991 thesis ‘The global city: New York, London, Tokyo’ (Goldman & Longhofer, 2009; R. Smith & Doel, 2011). The increasing urbanisation of society is a widely acknowledged trend, and estimates from bodies such as the United Nations are that by 2030, 61% of the world’s population will live in cities (Ashworth & Page, 2011). With this growth in cities comes reconfiguration of national economies, and the creation of ‘world cities’, as these cities become hubs for national and even regional economic activity (Ashworth & Page, 2011; R. Smith & Doel, 2011). Ryan (2010) described these new 'world cities' as being characterised by having large populations of sophisticated consumers; those consumers being the educated and professional middle class. He went on to say that these consumers will be seeking attractive places to live and work, and as a result these 'world cities' will boast numerous entertainment and recreation options, along with major conference and exhibition facilities, and high quality education and residential zones. Also necessary for a successful world city, is that it is the central point of a network, requiring not only world class information and communication infrastructure, but also transport infrastructure that connects it to the rest of the region as well the rest of the world (Goldman & Longhofer, 2009).

Auckland is currently home to 33.4% of all New Zealand residents and contributes more than 35% of national GDP. Auckland is certainly the economic and transport hub of New Zealand and this is expected to remain the case with the population of the Auckland region forecast to reach over two million by the year 2040 (Auckland Council, 2011c). In this regard Auckland can be regarded as a 'world city', however, in other aspects there is considerable development to be done before Auckland could be considered a true world city. From the perspective of the MICE sector in the region, if Auckland is to become a truly global city then the sector could potentially develop considerably, and it is within this context that this research takes place. Finally it should be noted that in the 2009 Mercer Quality of Living Survey of the World's Best Cities Auckland was ranked as equal 4th with Vancouver, a position it retained in 2010 (Mercer, 2011)

2.5 Conclusion

Auckland as a region is home to more than one third of all New Zealanders. It is the economic and transport hub of New Zealand. It is also a region characterised by diverse environments, ranging from natural undeveloped bush land and pristine beaches, to the central business district, where high rise buildings dominate the skyline. Tourism is an important part of the regional economy and the MICE sector is regarded as an important component of tourism in the region.

The changes that have occurred in the region's system of governance have resulted in a single body, the Auckland Council, taking responsibility for the region. The Auckland Mayor, Len Brown, has a decisive vision for Auckland's future. This vision, to be the world's most liveable city, calls for significant development of the region, and along with this comes the possibility of significantly developing the MICE sector in the region. The following two chapters begin to explore what further development might mean for the sector. Chapter three addresses the issues of what the MICE sector actually is, before chapter four looks at issues of sustainability and strategic planning and management as a means to develop the sector in a sustainable manner.

Chapter 3 – Sustainability and Strategic Planning

3.1 Introduction

This chapter outlines the theoretical base on which this research has been conducted. The chapter begins with a review of the literature in regard to sustainability, with particular regard to sustainable tourism and sustainable tourism development. This then followed by a discussion of how concepts around sustainability have previously been and are currently being employed within New Zealand, and more specifically the Auckland region. It is the contention of this thesis that the MICE sector is ideally positioned to assist in achieving the sustainability objectives laid out for the New Zealand tourism industry.

Strategic planning is widely acknowledged as being a vehicle by which sustainability can be achieved (e.g. Gunn & Var, 2002; Hall, 2000; Inskeep, 1991; Laws, 1995; Rodriguez, Parra-Lopez, & Yanes-Estvez, 2008; Simpson, 2001), and therefore the next section of this chapter examines the literature surrounding strategic planning. This begins with a review of the origins of strategic planning, and the history of strategic planning for tourism purposes. Like the previous section on sustainability, this is then followed by a review of how and when strategic planning has been utilised for the New Zealand tourism industry. In this section a framework for strategic planning is identified as a guide for the data collection in this research. This is then followed by a discussion regarding the key stages involved in this model, and how they have been interpreted for the purposes of this research.

The final section of this chapter examines the concept of consultative or collaborative planning, a concept that is seen by many authors (e.g. Aas, Ladkin, & Fletcher, 2005; Bramwell & Sharman, 1999; Jamal & Getz, 1995; Jamal & Stronza, 2009; Medeiros De

Araujo & Bramwell, 1999) as key to achieving sustainable outcomes from tourism planning processes. Within this discussion two key areas of theory are identified as important for understanding, implementing and managing a collaborative planning process; namely stakeholder theory and network theory. The literature for both areas of theory is reviewed and discussion is included as to how these theories have been utilised in this research.

3.2 Sustainability

Sustainability is a word that has been referred to by tourism academics on a frequent, and in some cases almost incessant basis for the past two decades (Sharpley, 2009). 'Sustain' by definition means to maintain without giving way (Macquarie University, 1989). Therefore, it can be said that 'sustainable' means being able to maintain without giving way. The question is then, 'What does sustainable tourism mean?'

Sustainability and sustainable development are two terms often used interchangeably (C. Hunter, 1997; J. Robinson, 2004). However, they do in fact have different meanings. Sustainable development is a term popularised in the late 1980's following the release of the United Nations World Commission on Environment and Development report, commonly known as the Brundtland report (Bridges & Wilhelm, 2008; Hunter, 1997; King, 2008; Robinson, 2004). The principles of sustainable development, as defined by the Brundtland Commission, require development to be conducted in such a way as to meet current needs while not compromising the ability to meet needs in the future (WCED Brundtland Commission, 1987). Whilst there is a focus on minimising environmental and social costs, continued economic development, whilst ameliorated, will continue (Robinson, 2004). On the other hand, sustainability as a term, does not imply continued growth, rather it implies the ability to continue indefinitely in the current state without adding to environmental costs.

Logically, this would mean that sustainable tourism simply means that tourism is able to continue in its current state indefinitely, thereby implying that the current and potential future environmental, economic and social impacts of tourism are all in balance and all aspects of the destination and the macro environment are stable (Hunter, 1997). Given the impossibility of achieving this static, balanced state, a simple definition is inadequate in describing the concept of sustainable tourism. Despite this, there is still a significant portion of literature that either offers no definition or simply points to WCED principles for definition of what is meant by sustainable tourism (Hunter, 1997; Sharpley, 2009; Weaver, 2004).

Weaver (2004) in his examination of the implementation of the concept of sustainable tourism highlighted two issues that complicate the definition of sustainable tourism. The complexity of the tourism industry is in itself a factor, particularly due to the fuzzy boundaries that are inherent in tourism. This complex set of overlap with other sectors and indirect and induced linkages make it difficult to define the impacts of tourism and therefore determine sustainability. The second issue identified is that there are a myriad of stakeholders, many of whom have conflicting objectives and therefore interpret sustainability differently.

Sharpley (2009) presented the argument that the problems in defining sustainable tourism development stem from the nature of tourism itself. He argues that tourism is essentially a capitalistic endeavour aimed at bringing economic benefit to destinations, and is by and large not compatible with the principles of sustainable development. This in turn has resulted in difficulties in developing practical and realistic policies and programmes. He also argues that this is further confounded by recent attention to the global issues of climate change and poverty. While some destinations have implemented plans and policies aimed at achieving sustainable tourism, these are only micro solutions to macro problems.

Hunter (1997) argues that the concept of sustainable tourism must be viewed as an adaptive paradigm that should be defined within the specific context that it is being used. He also provides four broad approaches to sustainable tourism based on four positions of very weak to very strong regarding sustainable development. He titles these approaches as sustainable development through (a) a tourism imperative (very weak), (b) product-led tourism (weak), (c) environment-led tourism (strong) and (d) neotenous tourism (very strong). Of these approaches product-led tourism and environment-led tourism are both evident within New Zealand and the Auckland region.

Sustainable development through product-led tourism has a focus on developing the tourism industry as far as is feasible within the destination and is most closely equated with a weak interpretation of sustainable development. This is achieved through the development of new products and maintenance of existing products. While there is certainly consideration given to minimising negative environmental and social impacts, continued development of the tourism industry is viewed as the first concern (Hunter, 1997). Hunter (1997) sees this approach as being easy to justify in well-developed tourist destinations where the economy is dominated by tourism. While tourism does not dominate the Auckland economy, it is certainly an important part of the economy. Additional evidence of this approach being utilised can be found in the nature of government involvement in tourism within the region. The previous Auckland regional development plan included tourism as a means by which development could be facilitated (Auckland Regional Council, 2006a). Tourism Auckland’s stated purpose was to develop and market the Auckland region as a destination to domestic and international visitors (Tourism Auckland, n.d.). The current discussion document for the Auckland plan continues to place emphasis on tourism as a driver of economic development and includes a priority of "creating a vibrant, creative world city attractive to visitors" (Auckland Council, 2011c, p. 92)

Environment-led tourism as an approach to achieving sustainable development is also evident in the Auckland region. Using this approach involves actively encouraging types of tourism that maintain a high quality natural and/or cultural environment. Wording in both the New Zealand Tourism Strategy 2015 (Zahra, 2011) and the Auckland region's previous Metro Plan (Auckland Regional Council, 2006a) highlight the importance of maintaining natural and cultural resources as the key to attracting visitors both now and into the future. Further evidence can also be found through the prevalence of opportunities to engage with the natural and cultural environment in Auckland promotional material (e.g. www.aucklandnz.com).

From the above it can be concluded that the New Zealand approach to sustainable tourism does not fit entirely into either Hunter's (1997) weak or strong approaches to sustainability. This is confirmed by the New Zealand Tourism Strategy 2015 defining a sustainable tourism sector as meaning:

- "our customers will enjoy their time in New Zealand, and will want to travel here for the unique and sustainable tourism experiences we offer
- tourism businesses will be financially profitable, able to reinvest in their businesses, and attract and retain the skilled workers they need
- the natural environment will be protected and enhanced, and the environmental footprint of the tourism sector will continue to shrink
- we work with communities for mutual benefit."

(Ministry of Tourism, Tourism Industry Association, & Tourism New Zealand, 2007a, p. 10)

Clearly there is still a desire for growth of the tourism industry, but of at least equal importance is the maintaining of the natural and cultural environment. Sustainable tourism is seen as a process of balancing economic, social, cultural and environmental aspects (Ministry of Tourism et al., 2007a).

3.2.1 Sustainability Indicators

After having addressed the issue of defining what is meant by sustainable tourism in the context of this current project, the next issue then becomes 'How is sustainability assessed and measured?' The United Nations World Tourism Organization (UNWTO) (1996, in D. Weaver & Lawton, 2006) defined a series of indicators of sustainable tourism along with measures that can be applied for each indicator, shown below as Table 3.1. While these indicators were intended to be applied at a whole of region level rather than for a specific industry segment, they could be applied to the MICE segment in the Auckland region. However, like defining the concept of sustainable tourism, sustainability indicators are also influenced by views of sustainable development, fuzzy tourism boundaries and multiple stakeholder objectives.

The complexity and fuzzy boundaries of the tourism industry generally and the MICE sector more specifically makes the use of multiple criteria and measures a necessity for assessing sustainability. As can be seen in Table 3.1 the UNWTO defined 11 aspects of tourism in a destination that should be measured. However, Tsaur, Lin & Lin (2006) identified 68 indicators from the literature that should be measured and concluded that even then coverage of all aspects and impacts was not guaranteed.

Table 3.1 – Sustainability Indicators (source - D. Weaver & Lawton, 2006, p. 344)

Indicator	**Specific Measures**
1. Site protection	Category of site protection according to IUCN index
2. Stress	Tourist number visiting site (per annum/peak month)
3. Use intensity	Intensity of use in peak period (persons per hectare)
4. Social impact	Ratio of tourists to locals (peak period and over time)
5. Development control	Existence of environmental review procedure or formal controls over development of site and use densities
6. Waste Management	Percentage of sewerage receiving treatment (also structural limits of other infrastructural capacity on site, such as water supply)
7. Planning Process	Existence of organised regional plan for tourist destination region
8. Critical ecosystems	Number of rare or endangered species
9. Consumer satisfaction	Level of satisfaction by visitors (questionnaire based)
10. Local satisfaction	Level of satisfaction by locals (questionnaire based)
11. Tourism contribution to local economy	Proportion of total economic activity generated by tourism only

A further complication when defining indicators stems from wider consideration of the industry’s impacts. Needham & Rollins (2005, p. 2) defined indicators as being “measurable and objective social, resource or managerial values that define quality settings and experiences”. While it is possible in most circumstances to define indicators that are to some degree measurable, objective measurement is not always possible. Robinson (2004) argues that sustainability is a social construct and accordingly the measurement of sustainability is undertaken within a particular social context. Therefore, it can be concluded that there will always be a degree of subjectivity involved in measuring sustainability. The WTO (cited in Miller, 2001a) recognised that some measures do not lend themselves to quantifiable, objective measures and are necessarily subjective. A relevant example of an indicator not easily quantified and certainly subjective is the impact of tourism on residents' access to leisure facilities.

It is acknowledged that indicators should be developed in the context of a specific time and place (Briassoulis, 2001; Tsaur et al., 2006). However, even once indicators are developed or selected, the questions still remain as to 'what level is sustainable and/or acceptable for each indicator?' and 'who should decide?' The multitude of stakeholders that are involved in tourism within a given destination makes these difficult questions to answer. It is the author's opinion that indicators and their levels will ultimately be selected by those developing the plan. However, as discussed later in the section regarding consultative planning, stakeholder involvement in the process is likely to be beneficial.

3.3 Strategic planning and management for tourism

The benefits of strategic planning for long term sustainability are well documented (e.g. Gunn & Var, 2002; Hall, 2000; Inskeep, 1991; Laws, 1995; Rodriguez et al., 2008; Simpson, 2001) and are not unique to the tourism industry. These benefits include enhanced cooperation and coordination across the industry, which leads to the development of a unique satisfying product that can adapt and maintain its appeal for the long term (Hall, 1995). Clearly this is a desirable outcome for the MICE sector in Auckland. The question then becomes, what is involved in developing and implementing a strategic plan for the sector?

The origins of current concept of strategic planning and management date in part from the 'Design School' model of strategy popularised by authors from Harvard business policy areas of the 1960's (H. Mintzberg, 1994). The 'design school' model (see figure 3.1), sometimes known as the SWOT model, involves using strategy to achieve a fit between the internal strengths and weaknesses of the corporation and the opportunities and threats posed by the external environment to thereby achieve a desirable future position (Mintzberg, Lampel, Quinn, & Ghoshal, 2003). This model was the dominant view of strategy making by corporations until at least the mid 1970’s and its influence can still be seen in the strategic planning processes used today (Mintzberg et al., 2003).

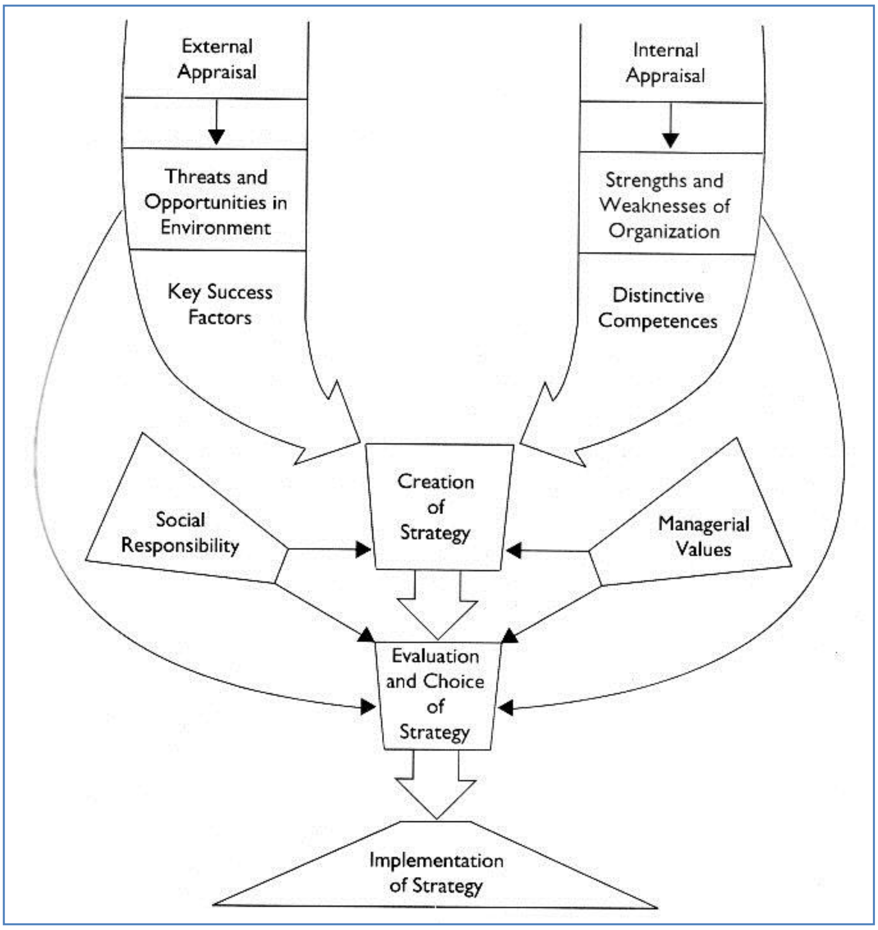

Figure 3.1 - The 'Design School' model (Source - Mintzberg, 1994, p. 37)

3.3.1 Strategic Planning for Tourism in New Zealand

The concept of strategic planning for tourism is not new for New Zealand. Within New Zealand, tourism planning has traditionally been the domain of Regional Tourism Organisations (RTO) (Simpson, 2001). However, RTO's have primarily been seen as having a promotional rather than planning role, and planning itself has been oriented toward marketing rather than issues such as natural or social sustainability (Ryan & Gu, 2008; Zahra, 2006).

The development of the *New Zealand Tourism Strategy 2010*, released in 2001, saw a shift in the focus of tourism planning to a more coordinated national approach with regional and sector specific strategies supporting the overall national strategy (Lenon, Smith, Cockeral, & Trew, 2006). *The New Zealand Tourism Strategy 2015* (NZTS2015) seeks to reinforce this and has provided a strong emphasis on the relationships that tourism has with both host communities and other industries. There is also an increased focus on the environments within which tourism operates and on ensuring the sustainability of those environments (Ministry of Tourism, Tourism Industry Association, & Tourism New Zealand, 2007b). The importance of the Auckland region and the MICE markets are acknowledged in the strategy.

The strategy is also supported by a detailed implementation plan, which includes actions, agencies involved and timing for each action (Ministry of Tourism, Tourism Industry Association, & Tourism New Zealand, 2008). Within this implementation plan there are several actions specifically directed at either developing the Auckland region or the MICE sector (Ministry of Tourism et al., 2008), but not one specifically regarding the development of further plans for the sector. The *NZTS2015* was scheduled to be updated in 2012 (Ministry of Tourism et al., 2008), however the author has found no evidence that is still going to occur.

Given that the *NZTS2015* also calls for particular attention to be paid to the sustainability of the industry (Ministry of Tourism et al., 2007a), if the MICE sector is to be used in achieving the objectives of the strategy, it too should be concerned with sustainability. If sustainable development is the goal for the MICE sector then a strategic, planned process of development is required. In order for strategic planning to be undertaken, there must be available reliable and comprehensive baseline data.

3.4 Strategic Planning Frameworks

There are numerous models and frameworks that have been proposed and used to plan for tourism and national, regional and local levels (Gunn & Var, 2002; Hall, 1995, 2000; Inskeep, 1991; Simpson, 2001). The influence of the design school model can be seen in a great number of these, particularly in regard to the steps involved in each process. Generally each models starts with a situational analysis, followed by strategy development and selection, followed by implementation. That said there are also significant differences in these models in regard to the purpose and scope for which they are intended.

Tourism South Australia developed a model for planning at a regional level (shown in figure 3.2). This model attracted significant praise from Hall (1995) for being the most integrative model developed by an Australian Government authority. This model was perhaps the first to deliberately integrate tourism demand issues and tourism supply issues into a single plan.

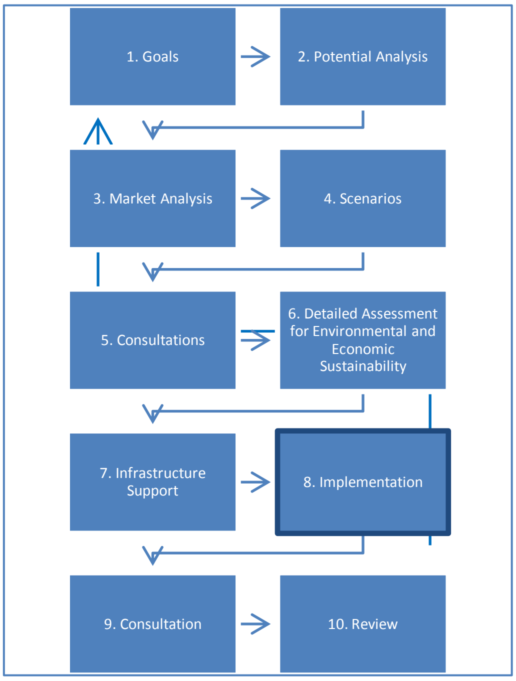

Figure 3.2 – Tourism South Australia's model for Regional Planning (adapted from Hall, 1995)

Within a New Zealand context, the Tourism Planners Toolkit was developed to assist local governments to plan for and manage tourism (Tourism Recreation Research and Education Centre, 2004). This toolkit utilises a model of strategic planning, (shown in figure 3.3) that is similar in the steps taken to the design school model. The first phase in this process is to undertake a comprehensive situational analysis. In the situational analysis the acronym VICE, which stands for visitors, industry, community and environment, is used to identify aspects to be considered. This is undertaken in order to identify key issues, constraints, impediments, dynamics and performances in the current situation. Plans can then be developed to address these issues and move towards desired outcomes. Once plans are developed the final stages of the process involve implementation, monitoring and control. It is also important to note that planning is not seen as a static process. The current situation, and performance of current strategies should be continuously monitored and new strategies developed and implemented as required (Tourism Recreation Research and Education Centre, 2004).

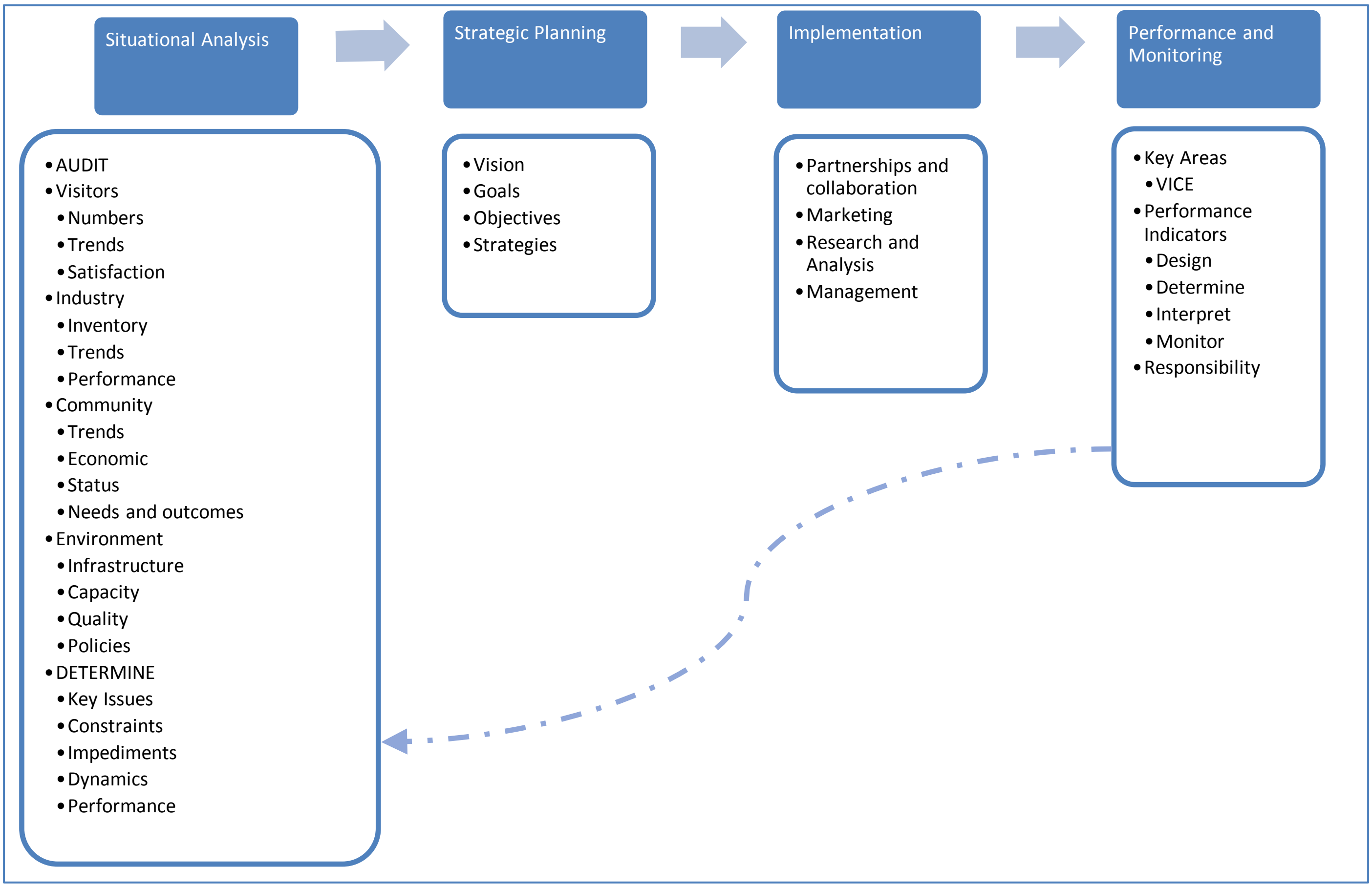

Figure 3.3 - Tourism Planning Toolkit model of strategic planning (Tourism Recreation Research and Education Centre, 2004)

The model of strategic planning used within the Tourism Planners Toolkit has been selected to inform this study for reason of:

- Familiarity and acceptance within the New Zealand Industry
- Generic framework, designed to be flexible enough for application in local areas throughout New Zealand, so it is easily adaptable to the specific circumstances of the MICE sector within the Auckland region.

3.5 Situational analysis

Most authors on the topic of strategic planning define situational analysis as the first step in the planning process (Cengiz, Nihan Çetin, & Tufan, 2007; Kotler, Bowen, & Makens, 2006; Morris, 2005; Robbins, Bergman, & Stagg, 1997; Sherman, Rowley, & Armandi, 2007). This makes sense for two main reasons. Firstly, comprehensive situational analysis provides a clear picture of where the organisation, industry or region is prior to implementing the plan. Without this knowledge, determining the progress made and the extent to which the plan, once implemented, is working, is significantly more difficult.

The second reason for conducting a comprehensive situational analysis prior to formulating plans is that it assists in identifying specific aspects to be addressed as part of the planning process. This holds true for targeting the plan to address areas of weakness and also capitalise on current strengths and opportunities presented (Forster & Browne, 1996; Robbins et al., 1997).

Situational analysis requires identification of both positive and negative factors resulting from both the internal and the external environment. SWOT which stands for Strengths, Weaknesses, Opportunities and Threats, is an underlying paradigm that provides a framework for assessing factors resulting from both the internal and external environment (Ahmed, Zairi, & Almarri, 2006; Forster & Browne, 1996; Lai & Rivera, 2006; Robbins et al., 1997; Stone, 2008), and determining which of these factors can be controlled and/or influenced by implementation of strategies and which cannot (Forster & Browne, 1996; Kotler et al., 2006; Lai & Rivera, 2006).

While other techniques have been proposed over the years, SWOT still remains one of the most commonly used and taught tools for undertaking strategic analysis (Ghazinoory, Zadeh, & Memariani, 2007; Hill & Westbrook, 1997; Mintzberg, 1994; Panagiotou, 2003; Sherman et al., 2007). It is for this reason that the SWOT technique is applied in this current study. However, that does not mean that the SWOT technique is perfect, or that it does not have critics.

The main criticisms of SWOT stem from the lack of specificity provided in the design school model. The model provides little guidance as to what should be considered when assessing the environment (Mintzberg, 1990; Panagiotou, 2003), and once factors have been identified no framework is provided for quantifying, examining further or prioritising factors (Cengiz et al., 2007; Ghazinoory et al., 2007; Hill & Westbrook, 1997). Numerous authors have offered means to assist in the identification and prioritisation of factors including; identification of components of the micro and macro environment (e.g. Kotler et al., 2006); application of a factors of TELESCOPIC OBSERVATIONS where each letter indicates an aspect of an organisation for examination (e.g. Panagiotou, 2003); the application of an analytical hierarchy process for prioritisation of SWOT factors (e.g. Cengiz et al., 2007); and the application of fuzzy analysis for ordering and prioritisation of factors (e.g. Ghazinoory et al., 2007).

The tourism planners toolkit model proposes the use of VICE classification of factors and provides factors to be considered for each of the VICE headings (Tourism Recreation Research and Education Centre, 2004). These factors are shown in figure 3.3, and cover a diverse range of aspects of the tourism industry and can easily be adopted for use specifically against the MICE sector. Comparison of the factors to be assessed using this framework with the factors assessed during the National Business Events study in Australia (Deery et al., 2005) shows a great deal of overlap with the VICE process going further in terms of exploring visitor trends, infrastructure, capacity and policies.

A further criticism of SWOT is a result of how the technique is applied in some cases. SWOT is most commonly used as one of the first steps in a strategic planning exercise (Cengiz et al., 2007; Hill & Westbrook, 1997), but all too often SWOT becomes a freestanding exercise, not linked to, or used within, the remainder of the strategic planning process. SWOT is most effective when used in the context of a specific problem or issue (Hill & Westbrook, 1997; Mintzberg, 1990). This suggests that issues should be identified first and then SWOT used to assist in identifying potential strategies for dealing with specific issues. Accordingly the SWOT analysis in this current research will be utilised as a technique for ordering information in order to identify strategies, with the VICE elements forming the basis for data collection.

3.6 Developing, Implementing and Evaluating a Strategic Plan

A traditional view of strategic planning for an individual organisation would see the next step after situational analysis as being re-visiting the overall vision, mission and strategies of the organisation to determine their continued desirability (Forster & Browne, 1996; Robbins et al., 1997). The situation in this case is somewhat different. The overall vision, mission and strategies are pre-defined and then drawn from a number of places, including the NZTS2015, the Auckland Plan and the Auckland Economic Development Strategy. Determining their continued desirability is not necessary in this case as effectively these need to be taken as 'given' by other actors such as venues and potential delegates.

Consequently the primary purpose of planning in this case is to determine how best to achieve a successful and sustainable MICE sector within the region and thereby assist in achieving the objectives of these fore-mentioned strategies. Therefore the next stage in this process is re-affirming priorities previously identified and then developing strategies to address these priorities. It is the author's opinion that ATEED, due to their central coordination role, are best positioned to coordinate the formulation of specific strategies and tactics.

Implementing the strategic plan, controlling the activities undertaken as part of this implementation and subsequently evaluating the outcomes achieved are the final phases of a strategic planning process (Kotler et al., 2006; Robbins et al., 1997; Stone, 2008). ATEED is also well positioned to coordinate these stages because of the legitimacy bestowed by the new unified council and the resources being allocated to it (Redman, 2011).

3.7 Consultative planning

One of the most commonly identified obstacles to successful implementation of strategic planning and management is obtaining and maintaining stakeholder support and commitment to the process (Hall, 2000; Mintzberg, 1994). Without stakeholder support and commitment, implementation of plans becomes significantly more difficult and in some cases not possible at all. Many authors (e.g.Gunn & Var, 2002; Hall, 2000; Jamal & Getz, 2000b; Simpson, 2001) agree that taking a consultative or participatory approach to planning is the best way to avoid this pitfall. Consultative approaches, where stakeholders are involved in the development and implementation of plans, increases stakeholders' sense of 'ownership' of the plan (Hall, 2000)

The considerable body of literature on this topic highlights other benefits thought to accrue from a consultative or collaborative approach to planning. Amongst these benefits is the concept of capacity building in the destination. This is in part achieved through collaborative learning and in part through improved relationships between stakeholders (Jamal & Getz, 2000a).

Another such benefit thought to accrue as a result of using a collaborative approach to planning is the number and quality of ideas and solutions that are generated. This is essentially due to collaboration resulting in a more comprehensive collective understanding of the current situation and a range of different ways of approaching issues due to the variety of different stakeholder perceptions (Hall, 2000). These benefits of collaborative planning provide sufficient reason for ensuring that any planning activity that is undertaken for the MICE sector in the Auckland region is done so in a collaborative manner.

Dredge (2006a) acknowledged that for collaborative planning to be successful the guidance provided by procedural models is insufficient. Planning involving multiple stakeholders involves messy decision-taking, with conflict, differing interests and power relations all serving to make the process complex. Forester (1999) believes that effectively facilitating a collaborative planning process requires the ability to mediate differences in opinions, values and levels of power amongst those involved in the planning process. This in turn then requires an in depth understanding of the stakeholders and their relationships (Dredge, 2006a). At this point in this thesis it is necessary to discuss to important field of theory that are highly relevant to the process of collaborative planning; stakeholder theory and network theory.

3.7.1 Stakeholder Theory

Stakeholder theory is concerned with the identification, classification and management of an organisation's stakeholders. It has its origins in Freeman's Stakeholder Model, in which seven groups of stakeholders were identified for a firm (Fassin, 2009). Freeman defined a stakeholder as "any group or individual who can affect or is affected by the achievement of the organization's objectives" (Freeman, 1984 as cited in Yilmaz & Gunel, 2009, p. 98). Since Freeman's original publication, stakeholder identification, classification and management has been subject of a considerable body of literature (Fassin, 2009).

One area that has received considerable attention is the definition of who is a stakeholder. Freeman's definition of a stakeholder as 'anyone who can affect or is affected by' is broad in its scope, and allows for a large number of individuals or organisations to be considered as stakeholders. Carroll (1991), in his early work on corporate social responsibility also uses a broad definition of stakeholders. He outlines that corporations have responsibilities to stakeholders on four different levels; economic, legal, ethical and moral. These views are in stark contrast to the views of authors such as Cochran and Friedman, who only recognise stakeholders with a direct economic relationship with the firm (Shankman, 1999; Sheehan & Ritchie, 2005). A mid-range approach to identify stakeholders was proposed by Clarkson (1995) who identified that:

> *"Stakeholders are persons or groups that have, or claim, ownership, rights, or interests in a corporation and its activities, past, present, or future. Such claimed rights or interests are the result of transactions with, or actions taken by, the corporation, and may be legal or moral, individual or collective."* (p.106)

Further differences emerge between theories of how stakeholders should be classified. A number of authors differentiate stakeholders as being either primary or secondary. Freeman, for example, defines primary stakeholders as being those with formal, official or contractual relationships with the firm, while all others are secondary stakeholders (Shankman, 1999; Sheehan & Ritchie, 2005). Along a similar line of thought, Clarkson described stakeholders as being either voluntary or involuntary, basis of whether the stakeholders has accepted risk through its activities with the firm (Shankman, 1999).

In contrast to these somewhat simplistic approaches to classifying stakeholders Mitchell, Agle & Wood (1997) propose a framework, shown in figure 3.4, that categorises a firms stakeholders based on three attributes of the stakeholder; power, legitimacy and urgency. Power refers to the ability of the stakeholder to impose its will on the firm. Legitimacy refers to the perception or assumption that firm will act in the stakeholder's best interests. Finally urgency refers to how pressing the stakeholders claim is on the firm. Using these attributes stakeholders are then broken into categories based on the number of these attributes they possess. Stakeholders with only one attribute are considered 'latent' stakeholders, those with two attributes 'expectant' stakeholders, and those with all three attributes, 'definitive, stakeholders. These authors argue that without identifying those that fall in the latent categories of dormant, discretionary and demanding stakeholders, it is impossible "to serve the legal and moral interests of legitimate stakeholders" (Mitchell et al., 1997, p. 882)

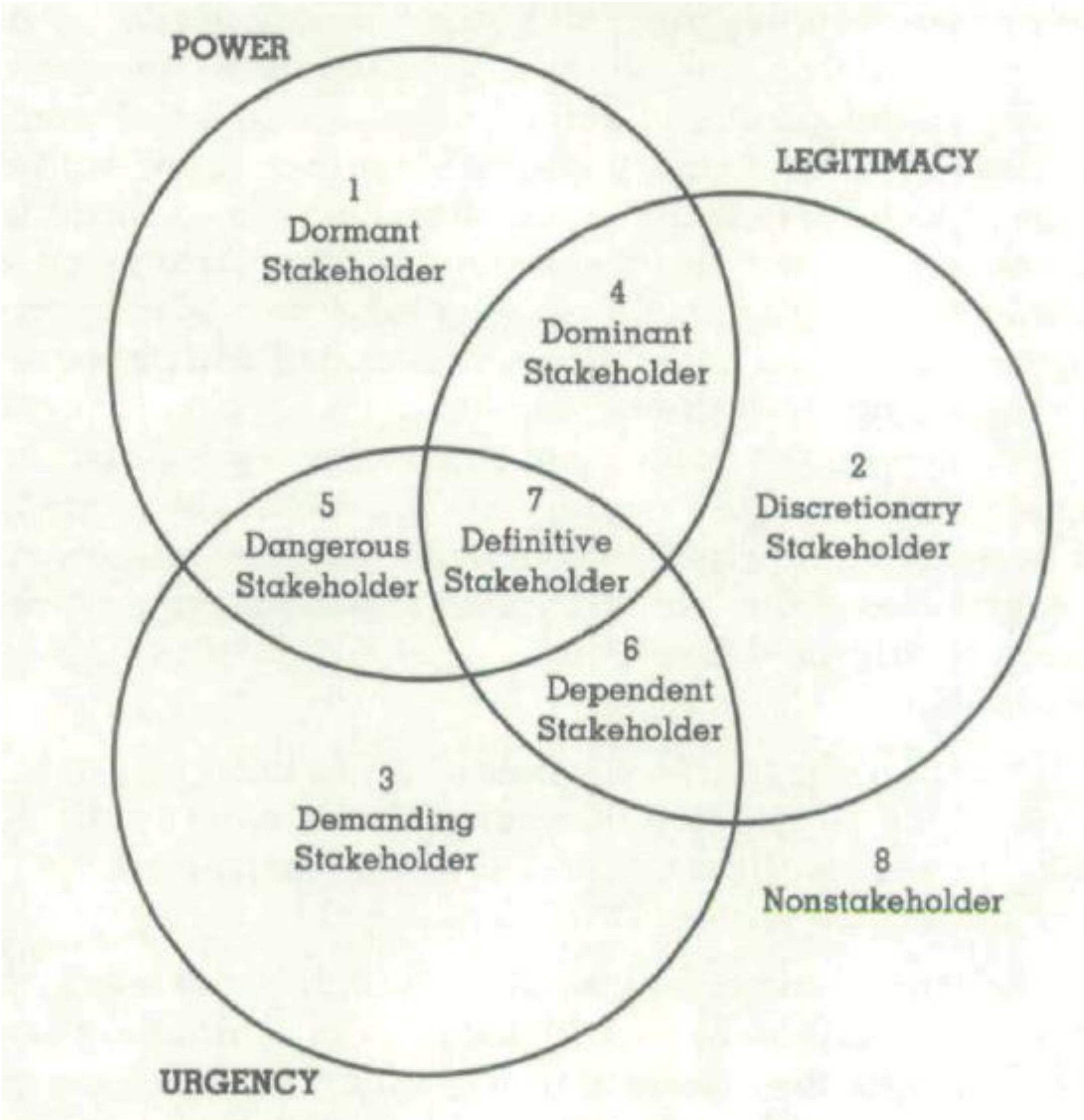

Figure 3.4 – Stakeholder typology based on power, legitimacy and urgency (Source: Mitchell et al., 1997, p. 874)

These theories that have so far been discussed have all been based around a single organisation (or firm), however, what is needed in the context of this thesis is to consider stakeholder theory in relation to an industry sector. Within a tourism context there are several authors who have drawn on stakeholder theory, primarily in the context of destination planning and management (Hardy, 2005). In one of the earlier published studies drawing on stakeholder theory, Sautter & Leisen (1999) explored how the interests of multiple stakeholder groups could be managed in tourism development and planning processes. They proposed a system whereby tourism planners classify stakeholders according to their strategic orientation. They concluded that stakeholder theory as a normative tool could and should be used to promote collaboration between key stakeholders in the planning process.

The contribution of Sheehan & Ritchie (2005), is also important to note in the context of this thesis. They explored not only identification and classification of destination management organisation (DMO) stakeholders, but also stakeholder salience, through an empirical study of the views of CEO's of 91 DMO's primarily located within North America. They concluded that stakeholders are generally recognised by CEO's as important, *"because they supply or facilitate funding, provide the tourism superstructure or product, participate in or generally support their programs, or influence governance"*(Sheehan & Ritchie, 2005, p. 729). They go further to say that stakeholders are viewed as primary based on their ability to either threaten the organisation. However, all stakeholders, both primary and secondary have a high potential to cooperate with the DMO.

Other studies within the tourism literature have explored stakeholder theory in regard to local tourism projects. One such example of this type of literature is the work of Nilsson (2007), who used stakeholder theory to explain the power imbalances between stakeholders in Billund, Denmark. He suggested that stakeholder theory justifies the need for a convenor of tourism planning to address this power imbalance. A second example is Heitmann's (2010) study of the roles of key stakeholders in film tourism planning and development. In this article stakeholder theory was used to explain the roles of four key stakeholders in terms of power and interest.

These studies discussed above are by no means an exhaustive list of all the previous tourism studies drawing on stakeholder theory, and are merely an illustration of the contexts in which stakeholder theory has previously been applied. To the best of the author's knowledge, stakeholder theory has not previously been applied in the specific context of the MICE sector, nor within a New Zealand context. Within this thesis, stakeholder theory has been utilised as basis for answering the core research question of 'who are the key stakeholders in the Auckland MICE sector, and how and why are they important to shaping its future?'

3.7.2 Network Theory

Network theory has its origins in sociology, as a means of explaining social structure by examining the configurations of social relations and positions (Cook & Whitmeyer, 1992a). Emerson (1972), one of the earliest theorists in this area, developed a model of individual behaviour based collective actors and social networks (Cook & Whitmeyer, 1992a). Network Theory has been used across a number of disciplines to explain how and why networks are formed, maintained and even disbanded, and to explain how power is gained within networks (Whittle & Spicer, 2008). It has been applied to explain structure in many fields including science, technology, economic, medicine and government (Passoth & Rowland, 2010) and of course within the tourism industry.

The tourism industry is by necessity, a networked industry. It is through collaboration and coordination that the tourism product of a destination exists (Scott, Baggio, & Cooper, 2008). That said the tourism industry and indeed the MICE sector is made up of a great number of stakeholders and a complex set of relationships. As is discussed in detail in the following chapter, the MICE sector is comprised of a number of different components and within each of these components there are a number of different players. This makes identifying stakeholders and their relationship to each other a difficult task. Network theory analysis can assist in this regard, as it provides a means to visualise and analyse complex sets of relationships (Scott et al., 2008).

Network analysis can be conducted as either a qualitative or quantitative exercise. In the case of quantitative exercises the mathematical algorithms are used to produce a measured graphical representation showing the nature and strength of all relationships within the network. These approaches require data from all members of the network and specialised software in order to complete the analysis. Given the large number of organisations involved in tourism, this exercise can also be very time consuming and/or expensive (Scott et al., 2008). The alternate approach is to use qualitative techniques to identify the actors in a network and describe the relationship between them. While these approaches do not have the mathematical rigour of quantitative approaches, many believe these approaches better take into account the changing nature of relationships (Scott et al., 2008).

Understanding of a network is developed through consideration of various aspects of the network including: a) the density of the network including the number of nodal points and their proximity; b) which nodal points are data creators, disseminators and collectors; c) which are points of influence; d) the direction of information flows e.g. bi-directional or uni-directional; e) the speed of information transmission; and f) the consensus building capacity of the network (Scott et al., 2008). The specific means by which these factors will be considered and network analysis utilised in this current study are outlined in the following chapter on methodology.

An area of network study employing qualitative approaches and of particular relevance for the current study is that of policy networks. Within the tourism arena this is very much an emerging area of research and as a result is yet to have received much attention (Dredge, 2006a). It has also been noted that in most cases network analysis has been applied retrospectively to planning and policy making processes in order to better understand the process and outcomes (e.g. Dredge, 2006a; Pavlovich, 2001; Pforr, 2006), rather than as a tool by which to influence the process as it occurs.

One such study of particular significance to this thesis is that of Dredge (2006b). In this study she explored the rather troubled history of the local tourism organisation in Lake Macquarie, NSW, Australia. In the period of 1972 to 1999 a local tourism organisation was established and later disbanded a total of seven times. Why Dredge's study is of particular importance to this thesis is the reasons why this establishment and disbandment occurred so many times. Dredge uncovered several dysfunctions in the way in which the local tourism network operated including power imbalances, absence of clear structure and defined roles, and a perceived lack of legitimacy of the organisations which were established. This is of significance to this thesis, as this research found many of these dysfunctions apparent in the MICE sector in the Auckland region. This is discussed in detail in the final chapter of this thesis.

A second study of particular relevance to this thesis is that of Beritelli & Laesser (2011). They looked specifically at power and influence in community based tourism planning within an alpine destination in Austria. They specified four sources of power, hierarchical, knowledge, process and assets, determined the level of influence actors within the network had in decision making. Interestingly they found that of the 44 actors that were perceived as being influential, the basis for this influence was knowledge in over half the cases. This is in stark contrast to the findings of this thesis, and this also is discussed in detail in the final chapter of this thesis.

3.8 Conclusion

This chapter has focussed on the concepts of sustainability and strategic planning. Strategic planning is forward thinking and as a result focuses attention on achieving a desired future position. In this way, strategic planning is a vehicle for achieving long term sustainability. The importance of engaging in consultative or collaborative planning has been highlighted in this chapter, along with the relevance of both stakeholder and network theories.

As has been seen in this chapter conducting a comprehensive situational analysis is the first stage in a strategic planning process. Situational analysis requires a thorough examination of all the components of the sector in order to determine its current position and the desired future position. The next chapter begins to identify the components of the sector and explores the relevant literature surrounding the various components and the trends and issues that are of concern for the sector.

Chapter 4 –

Composition, Structure and Issues and Trends for the MICE Sector

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4.1 Introduction

The purpose of this chapter is to review the current body of literature specifically related to the MICE sector and highlight what is currently known about the sector within the Auckland region. This chapter starts by defining what is meant by the term 'MICE sector', before examining the literature surrounding the sector's functional components. Following this is an examination of current issues and trends impacting on the MICE sector in the Auckland region.

4.2 The MICE sector – definitions and components

4.2.1 Definition

The MICE sector is known by several other names including the Meetings segment, Meetings Industry, Meetings, Conventions and Exhibitions (MCE), Conventions Industry and the Business Events sector. The name adopted has implications for what types of events are included within the study (Rogers, 2003). What the sector is known as depends, in part, on geographical location. Within Europe it is generally known as the Meetings Industry, while in Australia it is the business events sector and in North America and Asia it is usually referred to as the MICE sector (Dwyer, Deery, Jago, Spurr, & Fredline, 2007). There are, however, exceptions to this, with Morla and Ladkin (2007) using the term 'Convention industry' in their study of stakeholder perceptions and growth potential in Galacia and Santiago De Composetela, Spain, and Wei and Go (1999) using the name 'MCE industry' in their exploration of issues and strategies related to this sector in Beijing. MICE has been selected as the most appropriate name for this study as it is inclusive of all activities and has widespread understanding within the academic community.

Further complicating the definition is the question of whether it is a ‘sector’ or an ‘industry’. As seen from the above discussion, both terms are used almost interchangeably. Dwyer et.al. (2007), in their study undertaken for the United Nations World Tourism Organization, suggested it should be an industry rather than a sector. However, the focus of that study was on adapting national Tourism Satellite Accounts to achieve consistency and credibility for the information collected. However, the contrary view, and the perspective adopted for this study, is that tourism is the overarching industry and MICE is one sector of this industry.

Accordingly the MICE sector has been defined for this study as being:

> The sector that encompasses the supply and demand elements of events with a minimum of 10 participants using a paid venue for a minimum of half a day, where the aim of the event is to motivate participants, conduct business, share ideas, learn, socialise and/or hold discussions (adapted from Dwyer et al., 2007).

The number of ‘10’ participants is to a degree, arbitrary, but it can be argued that such group sizes begin to require degrees of organisation not involved in smaller group sizes in terms of programme arrangement and catering, and that such a size of group requires facility arrangements specific to itself other than say, a social group whose demands can be met from an existing facility or set of operations. In short, beyond this size, MICE organisers are called upon in a professional capacity, especially in the use of paid venues for a half-day’s duration. It is also important to note at this time that this somewhat arbitrary minimum number of participants does not preclude the inclusion of events having significantly larger numbers of participants. It is in fact possible for a large international convention to have the number of delegates fall in the several thousands. A recent example of an event of this scale is the 2010 Annual Lions International Convention held in Sydney. This event attracted over 12,000 delegates (Sydney Convention and Exhibition Centre, 2010). MICE events of this magnitude are a rarity if not unheard of in Auckland, yet the region does host some larger events. Indeed, for the year ended 30 June 2011, there were 27 MICE events hosted in the region with more than 500 delegates, but the average number of delegates per event for all events was 134 (Covec, 2011).

4.2.2 Components

By considering the MICE sector with a basic supply and demand model it is possible to identify the functional components that comprise the sector. Making up the sector from the demand side are the consumers of the MICE product, being host organisations (i.e. private companies, professional associations etc.), exhibitors and the attendees at MICE events (Kotler et al., 2006). On the supply side are the venues that cater to MICE events, which may vary from rooms in a motel to a large sporting stadium or a specially designed conference centre or multi-use centre such as Auckland’s Vector Arena that can cater equally well for pop music concerts to exhibitions. There are also key supplementary providers in that accommodation, transport and travel considerations are also important in determining MICE destinations. However, there are also a multitude of event suppliers involved in the sector (Ogden & McCorriston, 2007). Professional conference organisers (PCO), destination management companies (DMC) and inbound tour operators (ITO) are also considered as elements of the supply side for the sector, in that they play important roles in destination promotion, event organisation and associated activities that help to attract delegates and visitors (Deery et al., 2005).

4.2.3 Demand

One of the core principles of marketing is that in order to successfully sell a product, that product needs to meet consumer demand, and that the role of marketing is to influence the demand for a product (Kotler et al., 2006; Reid & Bojanic, 2006). Further to this in order to influence demand, it is necessary to understand the needs and wants of potential consumers of the product (Kotler et al., 2006; Morrison, 1996). Following from this it can be said that to generate MICE policies designed to influence the demand for the MICE product offered in the Auckland region, it is necessary to understand the nature of demand for both events and Auckland. It is important to know who is purchasing the product, why they are purchasing, their purchase processes and ultimately how satisfied they are with the product post consumption. By developing an understanding of consumers it is possible to determine the strengths and weaknesses of the product in creating demand and satisfying those who consume the product (Kotler et al., 2006). Threats to growth, especially in regard to competition, and opportunities for the sector can also be identified (Kotler et al., 2006).

For long term success in marketing Auckland as a MICE destination it is also important to determine the factors that led to the region and specific venues being selected. It is thus important to assess the satisfaction of event planners with their selection post event, as this will allow for future strategies to increase satisfaction on the part of the current and potential users of the city's conference and event facilities.

4.2.3.1 MICE purchase processes

MICE products are purchased by two separate but interrelated and equally important groups of consumers; the first being the event organiser/planner and the second being the individual attendees or delegates (Kotler et al., 2006).

In most cases the event planner or organiser is the first to purchase the MICE product. The purchase process generally follows a standard purchase behaviour process of:

1. Need or opportunity recognition;
2. General need description;
3. Product specification;
4. Supplier search;
5. Proposal solicitation;
6. Supplier selection;
7. Order, contract and delivery;
8. Performance review (Clark & McCleary, 1995; Kotler et al., 2006).

Individual attendees or delegates can be said to also follow a standard decision making process in relation to attendance. This process involves:

1. Need recognition or an invitation to attend
2. Search for alternatives (including other events)
3. Evaluation of factors (including personal, business, event specific and locational factors and cost of attending) and selection of preferred option.
4. Participation decision
5. Participation experience
6. Participation evaluation
7. Future intention formation (Lee & Back, 2007; Oppermann & Chon, 1997; Yoo & Xin 2010; Zhang, Leung, & Qu, 2007).

The multitude of factors that affect the decision making process and the heterogeneity of events, make these processes complex in nature. The following section explains some of these sources of complexity and outlines the way in which these processes are explored during this study.

4.2.3.2 Event organisers and planners as purchasers

Within the literature there are two main perspectives to be addressed. The first is the perspective of successfully marketing an individual hospitality business to the MICE segment. This is covered quite extensively in a number of hospitality and tourism marketing texts including Kotler et. al. (2006) and Reid & Bojanic (2006) as well as being the subject of some academic research (e.g. Shaw, Lewis, & Khorey, 1991; Toh, Peterson, & Foster, 2007; K. Weber, 2000). This perspective recognises that for MICE events it is the MICE event organiser/planner who is the first and often main purchaser of the product that any venue offers.

The second perspective addressed within the literature is that of destination marketing for MICE events. As with the marketing of individual businesses, destination marketing is also covered within both text books (e.g. Kotler et al., 2006) and academic journal articles (e.g. Baloglu & Love, 2004, 2005; Chen, 2006; Hankinson, 2005; Oppermann, 1996, 1998) and similarly recognises the importance of association event planner/organiser as purchasers of the MICE product. In a survey of 123 association meeting planners across North America 79% of these identified the selection of the destination for holding of events as being a primary responsibility (Oppermann, 1996).

The product that is purchased by event organisers and planners is to a large extent determined by the nature of the event and the organisation they represent. With this in mind it is helpful to divide event organisers and planners into a number of smaller, more homogenous groups based on the type of event they plan (Toh, DeKay, & Yates, 2005).

The most common grouping of events is corporate or association meetings. Event planners can then be divided into the two groups, namely corporate meeting planners and association meeting planners. It is also worth noting that a third group, professional independent meeting planners, also exist and can be engaged to assist in organising events that fall in either of the two above broad categories (Toh et al., 2007).

At this point it is necessary to define what is included in the category of a corporate meeting or event. A corporate meeting or event is one that is organised by one specific organisation and is seen as a necessary business activity for that organisation. In many cases attendees are employees of the organisation and are directed to attend the meeting or event (Kotler et al., 2006; Toh et al., 2007). While the host organisation is often a corporation, government agencies, members of the not for profit and educational sectors can also host these types of events where they exist to further the interests of the organisation in question.

On the other hand an association meeting or event is one that is organised by an association and can represent a revenue raising opportunity for the association (Toh et al., 2007). Association conferences, exhibitions and conventions tend to occur on a regular basis e.g. annually, are planned well in advance, and aim to attract as many delegates as possible (Kotler et al., 2006). Unlike corporate events, delegates have a choice as to whether to attend the event (Oppermann, 1996). Here the association exists to promote the interests of its members who are ‘voluntary’ delegates.

These differences in type of meeting are important when considering the role of event planners, due to the influence this has on site selection, importance of attributes and subsequent satisfaction with the destination and venue, and the likelihood of repeat business.

4.2.3.3 Factors influencing site selection

There have been several studies devoted to determining the factors that influence event planners' site selection. While the exact criteria differ between each study, generally the criteria can be categorised as being related to venue facilities, destination factors, accessibility, ancillary services (such as dining and leisure opportunities), and cost (Chen, 2006; Hankinson, 2005; Oppermann, 1996; Ryan, Crotts, & Litvin, 2007; Toh et al., 2007).

Another important factor influencing site selection is the influence of the meeting planners' previous experience with the destination. Previous positive experiences with a destination, either through having previously planned an event there or previous visits (sometimes not necessarily for work purposes) tends to mean meeting planners have a more positive perception of the destination than those who have no prior experience of the site or destination and its attributes. Likewise negative experiences tend to lead to more negative perceptions than those with no prior experience (Baloglu & Love, 2005).

Perhaps the most important factor in determining the importance of the various attributes in the site selection process is the nature of the host organisation. Toh, Peterson & Foster (2007) explored the differences between the approaches of association and corporate meeting planners and made recommendations regarding how the hospitality industry should approach each type of event planner. In their study they identified corporate meeting planners to be primarily focussed on containing costs associated with the meeting. Corporate meetings planners also tended to focus on the accessibility of the destination and venue, and the actual meeting facilities.

On the other hand association meeting planners tend to make site selections based on a broader range of criteria. As the goal of association event planners is to maximise attendance at the event, they are looking for ways in which to make the event appealing to the target audience. This includes choosing appealing settings for the event, the availability of services and facilities to create social opportunities during the event and finally tourism and leisure opportunities available to event attendees (Toh et al., 2007).

Fortin & Ritchie's (1977) study was the first to be conducted on the site selection process used by associations. This study concluded that hotel service, air access, hotel rooms, conference rooms and price levels were the most important factors in site selection for associations when planning meetings. According to these results, venue facilities, accessibility and cost factors are more important in the site selection decision than destination factors and ancillary services. Other studies conducted following Fortin and Ritchie's work produced similar results (e.g. M. Oppermann, 1996).

Oppermann's (1996) study of the importance of destination attributes for association meeting planners is one of the more commonly cited studies and the first published study to use convention selection attributes to evaluate specific convention destinations. Oppermann used 15 convention destination attributes, compiled from previous studies, and used self-completion questionnaires to ask respondents to rank the importance of attributes. He then used importance – performance analysis to rank 30 North American convention city destinations. Overall ranking of destinations was completed using a 15 point likert scale and importance and performance for each attribute was done using a 7 point likert scale. The results of this study confirmed venue facilities, accessibility and cost as the most important considerations when making the selection decision. In terms of the current study it is important as it provides a comprehensive and soundly tested set of attributes by which the Auckland region can be assessed.

Chacko & Fenich (2000) also examined the attractiveness of North American convention city destinations. However, their study was limited to 7 cities in the United States. They asked respondents to rate each city both overall and on 12 different attributes. They then applied multiple regression analysis to determine which attributes were the most important in determining overall perception of the destination. In contrast to the work of Oppermann (1996) and Fortin & Ritchie (1977), promotional appeal (including destination factors and ancillary services) was found to be the most important factor in determining the overall rating of the destinations studied.

The contribution of Clark & McCleary (1995) to knowledge of the site selection process of associations is also worth noting. In their study they noted that associations tend to form an 'evoked' set of potential host destinations early on the site selection process and that destinations not included in the initial evoked set are unlikely to be considered later. It then makes sense that destination factors, including destination image, are very important in the early stages of the site selection process, with cost, meeting and accommodation factors becoming more dominant later in the process as the final selection is made.

Crouch & Louviere's (2004) study of the determinants of convention site selection is of particular importance for this current study as it looks specifically at the site selection processes for Australian associations. Not only is Australia closer in geographic proximity and business environment to New Zealand than North America, but it is also an important source of MICE visitors for the Auckland region with Australians making up over half the MICE visitors to New Zealand during 2007 (Tourism Research Council, 2008). Crouch & Louviere's study took an innovative approach to determining the destination attributes most important to Australian association event planners. By creating 128 hypothetical domestic destinations and using a process of choice modelling and comparison they were able to determine the importance of 20 convention destination attributes. Their findings indicate that in order for a convention destination to be successful in attracting Australian association events they must not only offer good venues and associated services, but also a range of promotional factors.

Two specific findings also arose from Crouch & Louviere's (2004) study that are of significance for this research investigation. Their findings indicated that proximity of delegates to the destination is a very important factor in the selection decision, where average flight times for delegates exceeds 2½ hours, appeal of the destination decreases dramatically (Crouch & Louviere, 2004). While there are direct flights from the 3 major eastern Australian cities to Auckland, all flight times exceed 2 ½ hours. International destinations were not considered in their study, so this criterion cannot be assumed to hold true in the case of Auckland. However, it is an important factor to explore in the current study, and raises the issue as to whether differences exist within the market when (a) considering domestic and international venues and (b) to what extent is Auckland considered truly 'international' for an Australian market.

The other finding of Crouch & Louviere's (2004) study that is significant for this current study was the strong preference for most, if not all delegates to be accommodated at or very close to the event venue. If this is indeed the case, then an assessment of Auckland's capability in this regard is required.

As is evident from the above, while the literature on association site selection is extensive, the literature on corporate meeting site selection is limited. However, evidence of the importance of containing costs associated with corporate meetings can be found in a variety of sources. Toh et. al. (2006) found that US corporations were then seeking to reduce meeting costs and in most cases took one of two approaches: consolidation or outsourcing. Numerous articles on containing meeting costs and getting the most out of meetings can be found in trade publications targeted at corporate meeting planners (e.g. Amer, 2007; Bassett, 2008; Carey, 2007; Cioffi, 2006; Dosh, 2006; Friedmann, 2008; Kovaleski, 2006). If Auckland is to maintain and/or further develop a desirable product for corporate meeting planners, an examination of price competitiveness for the Auckland region is required as part of this current study.

A final point to note in relation to the literature on site selection processes is that each of the above studies have been conducted in overseas locations and not tested within the New Zealand context. Therefore, while these studies are certainly useful in guiding this research project, they cannot be assumed to hold true in the specific context of MICE events held in the Auckland region. By testing the applicability of these studies in the Auckland region, important information can be gathered regarding how and why Auckland is selected as a host destination for corporate and association meetings. This in turn allows for strategic improvement in both the way Auckland is promoted and which aspects of the sector are developed.

4.2.3.4 Attendees or Delegates

In order to examine the motivation to attend MICE events it is first important to draw the distinction between delegates for corporate meetings and delegates at association events. Attendance at corporate events is usually not voluntary and bookings for travel arrangements including accommodation tend to be made by and paid for by the company (Toh et al., 2007). Attendance at association events is on the other hand voluntary and given the large selection of events attendees have to choose from the selection process is often complex and lengthy (Severt, Wang, Chen, & Breiter, 2006; Yoo & Xin, 2010).

Oppermann & Chon (1997), Severt et.al. (2006) and Zhang et.al. (2007) provide a comprehensive summary of the factors that influence an individual’s decision to attend an association conference or convention, placing the factors into 4 categories of: (1) personal/business factors, (2) association/conference factors, (3) location factors and (4) intervening opportunities. Yoo & Xin (2010) revisited the factors that determine convention participation in light of the economic downturn following the 2008 economic crisis, as is discussed later in this chapter. Their findings were similar to those of the earlier studies, however they group the influencing factors slightly differently calling the groups; networking, destination, travel ability and education. They found the three most important factors influencing the decision to attend an association conference being: 1) To learn new skills and/or knowledge; 2) professional networking opportunities; and 3) the total cost of attending. The Auckland region is best positioned to influence factors falling into the location or destination category, but before this can be done it is necessary to determine what the specific factors are that attract MICE visitors to the Auckland region and how well expectations of visitors are being met during their time in the region.

Ancillary issues also arise, including the ability of Auckland venues to provide advice and ancillary services to event organisers, while the ability of the hotel sector to provide a range of accommodation for given tastes and budgets may also be a factor of some importance. The next section of this chapter will therefore provide a review of the supply side of events as currently existing in Auckland.

4.2.4 Supply

Equally as important as understanding demand for the MICE product in the Auckland region, is an understanding of the elements that make up the MICE product offered. The MICE product, like all other tourism products is by its very nature complex. The product that an event organiser or attendee consumes is composed of a multitude of tangible and intangible elements and combinations of these elements may differ every time it is consumed. The model first proposed by Gronroos in 1987, and later adapted by Kotler, Bowen and Makens (2006), provides a useful starting point for considering the numerous elements that comprise the MICE product.

This model proposes that product consists of four levels; the core, facilitating, supporting and augmented products (Kotler et al., 2006). If we take a delegate, who normally resides in Wellington wanting to attend a three day conference in Auckland as an example, it possible to define these four levels in terms of the MICE product. In this case the core product is the delegate's attendance at the event, that is essentially what the delegate is purchasing (Kotler et al., 2006). The facilitating products are the elements of the product that allow the delegate to attend the event, including transport and its cost, the venue of the event, the accommodation where the delegate stays during the event, and the catering at the conference (Kotler et al., 2006). The supporting products are the extras that make the core product more appealing (Kotler et al., 2006). In the case of the delegate attending the conference, this may include a conference pack received at registration, a cruise on the harbour, a pre- conference cocktail function, or complimentary airport transfers. The final level, the augmented product, includes the intangible elements of the product such as atmosphere, accessibility, interactions with staff and other delegates, as well elements of the product relating to the physical environment, such as venue proximity to the harbour or the quality of the audio visual display at the conference (Kotler et al., 2006). An additional consideration may be social attractiveness of the event in terms of perceived sociability of the other delegates. By considering the MICE product using these levels it becomes clear that the product is in fact a culmination of what is delivered to the consumer by a great number of stakeholders.

By identifying the elements that make up the supply side of the sector in region, it is possible to examine the strengths and weaknesses of the sector in delivering a desirable and competitive product to MICE consumers.

4.2.4.1 Venues

Venues are perhaps the most visible supply side element of the MICE sector and are certainly a very important part of the sector. Venues for the purpose of this study include all facilities that have at least one space or room available for hire for the purpose of holding MICE events. These can include hotels or motels, convention centres, show grounds, racetracks, event centres, resorts, restaurants, universities, community halls, club facilities, cruise ships and tourist attractions (e.g. museums) (Deery et al., 2005; Tourism Auckland, 2008).

Table 4.1 – Classification of event venues (after Ogden & McCorriston, 2007; Team Tourism Consulting, 2007)

Purpose Built	Accommodation Providers	Multi Purpose	Educational	Unusual
Convention centres	Hotels Motels Resorts	Event Centres Community Halls Show Grounds Town Halls	Universities Polytechnic Institutes	Racetracks Restaurants Club Facilities Cruise Ships Tourist Attractions

Not surprisingly, given the large amount of investment in construction, expansion and refurbishment of convention centres that is occurring around the world (Fenich, 1992; Nelson, 2006), there is a significant body of literature regarding large scale convention centres. Much of this literature has primarily focussed on convention centre design, and convention centre development. Both these issues are explored later in this chapter in the section ‘Trends and issues for the MICE sector’.

Somewhat surprisingly, there has been little attention paid in the literature as to what each group of convention services consumers (namely event planners, exhibitors and delegates) actually see as important for venues to provide. In terms of meeting planners, the limited literature has tended to focus on accommodation facilities with convention or meeting facilities (known from this point forward as convention hotels). The research in this area varies greatly from broad studies of the importance of a range of factors in the pre, during and post event stages (e.g. Weber, 2000) through to specific studies looking just at one aspect of the convention hotel’s servicescape (e.g. Hilliard & Baloglu, 2008 who looked at safety and security features). It is recognised that individual meeting planners have differing preferences (Clark & McCleary, 1995; Hilliard & Baloglu, 2008; Hu & Hiemstra, 1996; Weber, 2000).

As discussed in the previous section regarding event planners, preferences differ based on a range of factors including the type of event and the host organisation for the event.

Despite the range of differences in preferences for individual meetings, several studies have shown that in selecting a convention hotel, meeting planners tend to assess convention hotels based on some common key attributes. The four most commonly cited factors are: location of the hotel; quality of the meeting facilities; quality of service; and quality of guest rooms (Clark & McCleary, 1995; Dube & Renaghan, 2000; Hinkin & Tracey, 2003b; Rutherford & Umbreit, 1993; Strick, Montgomery, & Gant, 1993). It is also noted that as cost increases so do expectations of quality in each of these categories (Hinkin & Tracey, 2003a). In terms of this current study it is important to assess meeting planners' expectations and satisfaction with the venues in the Auckland region.

The delegate's perspective has largely been overlooked until quite recently. Wu & Weber's (2005) study of convention delegates' perspectives of a major Hong Kong convention centre's facilities, attributes and services is believed to be one of the first articles, if not the actual first article, of this nature published in an academic journal. This study used importance-performance analysis to assist in the development of marketing strategies for the convention centre studied. The study utilised a self-completion questionnaire containing 23 items where respondents were asked to rate the importance and performance of the venue using a 5 point scale. The most important factors for delegates found in this study are summarised below in Table 4.2.

Breiter & Milman (2006) examined the perception of attendees at 5 exhibitions held in Orange County, USA. They also used importance-performance analysis and a 5 point likert type scale. The survey instrument asked respondents to rate the importance of 26 variables. As can be seen from Table 4.2, the most important factors are quite similar to those found in Wu and Weber's study. The variables 'helpful, friendly staff', 'adequate restrooms', a 'clean well maintained venue', 'accommodation nearby', 'signage within the venue', and 'ease of access to the centre' appear on both lists.

Ryan, Crotts and Litvin (2007) conducted their research using attendees at events held at the Charleston Convention Centre also in the USA. The focus of this research was to uncover which factors are controllable by a convention centre's management and the extent to which these factors influence satisfaction with an event. As shown in Table 4.2 the most important factors are similar to other two studies.

Table 4.2 – Important Attributes, Facilities and Services of a Convention Centre- Delegates

Wu and Weber (2005)	Breiter and Milman (2006)	Ryan, Crotts and Litvin (2008)
1. Availability of ventilation in the meeting rooms 2. Availability of state-of-the-art A/V 3. Comfort of seating 4. Adequacy of restrooms 5. Helpfulness of staff 6. Language ability of staff 7. Maintenance of the venue 8. Proximity to accommodation 9. Courtesy of staff 10. Transport to the venue	1. Overall cleanliness of the venue 2. Maintenance of the venue 3. Directional signage in the venue 4. Proximity to accommodation 5. Adequacy of the restrooms 6. Ability to get a cell phone signal 7. Helpfulness of staff 8. Directional signage to the venue 9. Friendliness of staff	1. Cleanliness of the restrooms 2. Quality of service 3. Friendliness of service 4. Directional signage to the venue 5. Directional signage in the venue 6. Ease of identifying car park entrance 7. The ease of registration 8. Standard of the event 9. The overall ambience of the venue

The consistency between the findings from each of these studies, lends confidence to the general applicability of the findings in regard to what is important to attendees of events held in convention centres. Therefore, the findings in relation to important factors from a delegate's perspective have informed the design of questionnaires for delegates in this current study.

Similarly to delegates, the exhibitor's perspective of important factors for a venue has not been a popular topic for examination within the literature. In fact, to the best of the author's knowledge there has only been one study published regarding what exhibitors look for in a venue. This study, by Breiter & Milman (2007), examined the importance of a range of factors for exhibitors at 2 events held in one of the largest convention centres in the USA. Their findings indicate that 11 factors are seen as being very important by exhibitors. These factors listed in order of importance are:

1. Ability to get a cell phone signal in the building
2. A well maintained facility
3. Overall cleanliness of the facility
4. Sufficient lighting in the exhibition hall
5. Power and communication outlets in floor in the exhibition hall
6. Directional road signage to the venue
7. Availability of quality lodgings near the venue
8. Temperature control in the exhibition hall during move in
9. Easy access to local foodservice facilities
10. Price of exhibitor parking
11. Assistance of exhibitor service representatives

Interestingly it appears that exhibitors are less concerned with service aspects of the centre and more concerned with logistical aspects of the venue. While these factors have not been confirmed by other studies, they are still useful in informing the design of the exhibitor questionnaire for the current study.

4.2.4.2 Accommodation

As discussed in the previous section, there has been significant research regarding what meeting planners expect from hotel meeting venues. The other area of research of relevance to the current study is the extensive literature regarding business travellers' hotel selection and satisfaction. While not all business travellers can be said to be MICE travellers, to the author's knowledge there has been no research specifically regarding MICE travellers' accommodation selection and satisfaction.

More generally, business travellers' preferences and satisfaction have been explored from a range of different angles, including: differences between business guests and holiday guests (e.g. Yavas & Babakus, 2003); differences between male and female travellers (e.g. Sammons, Moreo, Benson, & DeMicco, 1999); and differences between the perceptions of management and guests (e.g. Chan, 2004). The majority of studies have focussed solely on hotels, however some researchers such as Dolnicar (2002) and Griffin, Shea & Weaver (1996), explored differences between different classes of hotels. Radder & Wang (2006) looked outside of the hotel sector and looked specifically at guest houses in South Africa. Despite these differences, the vast majority of studies include 'location', 'value for money', 'service encounters', 'cleanliness', and 'guest room comfort' amongst the most important criteria driving not only selection of accommodation but also resulting satisfaction.

It is common practice for accommodation providers, especially hotels, to have formal mechanisms for collecting guest feedback on hotel specific criteria. That said, within the context of this current study building a picture of the current levels of satisfaction with hotels in the Auckland region is an important part of understanding the strengths and weaknesses of the sector.

4.2.4.3 Event Suppliers

A MICE event often utilises a range of specialised suppliers during the staging of the event. These suppliers can include including catering, A/V and other equipment, promotional materials and merchandise, security services, sightseeing and entertainment providers, and transport providers. The types of suppliers utilised for any specific event varies greatly, and depends on the specific nature of the event and the venue at which the event is held.

Suppliers are important stakeholders in the MICE sector. Ogden and McCorriston (2007) examined the role of supplier relationships in successful event management from the perspective of UK venue managers. They concluded that long term ties with suppliers are beneficial for both the venue and supplier and that positive relationships with suppliers can result in positive outcomes for events. The advantages most often cited by venues were: ‘good working relationships’; ‘consistency’; ‘familiarity’; ‘enhanced responsiveness and flexibility on the part of the supplier’; and ‘cost benefits’. The relationship between venues and suppliers is an area that needs to be considered in the current study.

There is a body of literature available for each type of supplier. For example in relation to catering, Shock & Stefanelli’s (2001) book *On-Premise Catering* covers a range of aspects relevant to caterers including marketing, menu planning, dealing with other departments and staffing. Relevant research can also be found such as Wanhill’s (1989) study into event pricing practices. Exploring these bodies of research in entirety is not particularly useful for this current research. Instead the emphasis is on discovering who the suppliers are, to what extent they rely on the MICE sector for business and what strengths and weaknesses exist in the region in terms of supply as a whole.

4.2.4.4 Independent Event Managers and Destination Management Companies (DMC)/Inbound Tour Operators

Together, professional event managers and DMC/ITO's form an element that strictly speaking falls on the supply side of a model because they provide a paid service for consumers. However, their role also requires them to act as an intermediary between consumers of MICE products (most commonly host organisations but also to some extent event attendees) and other elements of the supply side of the MICE sector, including venues, accommodation, transport providers, and sightseeing and entertainment providers.

The role and importance of intermediaries in the tourism and hospitality industries is widely acknowledged. Many hospitality and tourism marketing texts include sections regarding the role of intermediaries (e.g. Kotler et al., 2006; Morrison, 1996; Reid & Bojanic, 2006). Despite this acknowledged importance there has been little published research in this area.

Dube & Renaghan (2000) examined best practice in marketing hotels to travel agents and meeting planners. They saw marketing to these groups as important due to the increased likelihood of gaining repeat business. In a survey of 123 American meeting planners, they found the most important hotel attributes that develop loyalty were the quality of service related to meetings and communication with the meeting planner. Given these results, the current study needs to examine the communication that occurs between these intermediaries and the suppliers they engage on behalf of their clients.

From a different perspective, Toh, DeKay & Yates (2005) examined the roles and compensation of independent meeting planners. They found that the majority of compensation was based on a fixed fee for service arrangement. Of interest was the limited range of services that most independent meeting planners were employed to provide. Venue selection and negotiation of rates with providers were the most common tasks they performed. Although they were sometimes called upon to provide a more comprehensive event management service, the meeting planners interviewed were never responsible for meeting content. As for many of the other studies discussed in this chapter, these findings cannot be assumed to hold true for the Auckland region. Therefore, the current study will examine the role of independent event managers in the Auckland region.

4.2.5 The Role of Government

In addition to considering the nature and role of the functional components that comprise the MICE sector, it is also necessary to consider the role of government. Within the broader tourism literature several studies have examined the role of different government agencies in regard to tourism. The general consensus amongst most researchers in this area is that in Western nations there has been a significant shift from top down bureaucratic government to a more managerial and coordination approach to governance being adopted (e.g.Beaumont & Dredge, 2010; Bramwell, 2011; Hall, 2000, 2011). This has led to the formation of numerous public-private partnerships, networks and involvement of multiple actors in policy formulation and planning processes. It is for this reason that network theory as discussed in the previous chapter is an important consideration for this thesis.

Within a New Zealand context, Zahra has done considerable work on defining the role of regional tourism organisations (RTO). Her PhD thesis explored the changes that occurred in the nature and role of RTOs during the period 1980 to 2005. Her work highlighted the increase in the role of RTOs in destination planning and management (Zahra, 2006). In later work, she explores the governance of individual RTOs in New Zealand and how the governance structure led to the demise of the Waikato RTO (Zahra, 2011). While Zahra's work was certainly useful in informing the likely structure of governance that was in place in the former Auckland RTO, Tourism Auckland, it does not address the specific role of government in regard to the MICE sector. However, as noted above central government has played a leading role in first initiating changes in the governance of Auckland, second in playing a key role in attracting events such as the America's Cup and Rugby World Cup to Auckland, and third in direct intervention in MICE policy in Auckland as demonstrated in negotiations with Sky City over a conference centre, and in transport organisation during the Rugby World Cup. It might be observed that such interventions have not always been welcomed by the Auckland councils, and such intervention compares with a lack of support for other initiatives such as Auckland's desire for significant transport investment that includes extended rail services.

4.2.5.1 The Role of Convention Bureaux

Convention bureaus play a key role in the MICE sector and some research has been specifically focussed on the role that convention bureaus play. The role of a convention bureau is primarily to market and sell a destination to MICE event organisers (Gartrell, 1991a; Getz, Anderson, & Sheehan, 1998; Wang, 2008). If we consider marketing as involving activity in each of Morrison's (1996) 8 'Ps', (product, promotion, price, packaging, programming, partnership and people), then it becomes clear that this is not quite as simple a role as it first appears.

Wang (2008), in his exploratory study of the role of North American Convention and Visitor Bureaux (CVBs), defined ten strategic roles for CVBs in destination marketing:

- Destination marketer/promoter
- Image/brand developer
- Industry coordinator
- Advocate/facilitator of tourism projects
- Economic driver
- Quasi-public representative
- Builder of community pride
- Partnership/alliance builder
- Destination planner/manager
- Destination product developer

Wang (2008) also, like Getz *et al.* (1998), found that most effort was focussed on promotion of the destination and to some extent on packaging of the destination product. A further role that these studies also found to be important was the promotion and coordination of collaboration between fragmented industry stakeholders. Determining the roles that the Auckland Convention Bureau performs has been important in this research.

4.3 Trends and issues for the MICE sector

4.3.1 Environmental Issues

Environmental issues, particularly global warming, have in recent times been the subject of considerable media attention. The result of this attention has been a perceived pressure on business to be proactive regarding environmental issues and to manage their business in an environmentally friendly manner. This is a significant issue for the MICE sector due to the involvement of businesses in the sector as both suppliers and customers. This has resulted in responses to meet the demand for environmentally friendly MICE products, but also for MICE businesses to manage their business in an environmentally friendly manner (Locke, 2007; Mair & Jago, 2010). Mair & Jago (2010) concluded that gaining competitive advantage, being seen to be green, and meeting standards of corporate social responsibility where important drivers for introducing environmental initiatives within the MICE sector. Further to this Park and Boo (2010, p. 110), in assessing convention tourism's potential to contribute to environmentally sustainable growth, stated that their research "proves that convention stakeholders have strong intentions to adopt green management", albeit on the proviso that doing so did not incur additional financial costs .

The most obvious examples of MICE businesses utilising pro-environment strategies and tactics can be seen in the design and construction of event facilities. The design of modern convention centres now utilise many pro-environmental features such as the use of solar panels, natural airflows and natural lighting (Lawson, 2000). Since 2003 a number of American convention centres have received U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED) certification (Curley, 2008). The first convention centre to be certified was the David L. Lawrence Convention Center in Pittsburgh. At the time of its certification it had been called 'the largest green building in the world'. This centre boasts generous use of glass and skylights that provide natural light and assists in balancing temperatures. Fresh cool air is gathered and pumped into the centre to form a low cost and energy efficient ventilation system (Kobes, 2005). In addition, the centre also has a water reclamation system in place (Johnson, 2003).

The Congress Centre Salzburg, Austria, is another example of a recently completed centre incorporating environmentally friendly initiatives. Extensive use of glass facades allow for natural lighting. Voltaic cells on the roof and heat pumps that extend 16 metres into the ground assist in minimising energy consumption (Lawson, 2000). The Tokyo International Forum, Japan also makes use of extensive glass. In addition $594m^2$ of solar cells and $410m^2$ of vacuum glass solar heat collectors can be found on the roof (Lawson, 2000).

In addition an ever increasing number of tourism and hospitality businesses, including those involved in the MICE sector, are choosing to participate in schemes, such as Carbonzero and Green Globe, that demonstrate their commitment to environmental harm minimisation (Earthcheck Pty Ltd, n.d.; Landcare Research, 2007). Although there is a growing number of MICE related business choosing to become involved in these types of schemes, there has been very little research regarding how important environmental initiatives are in the site selection process. Draper, Dawson and Casey (2011) conducted an exploratory study into the importance of a range of factors to 269 meeting planners based in the US. They found that none of the factors they presented in their study were considered to be any more than slightly important in the site selection process.

It was important in the early phases of the current study to examine the impact environmental issues is having on the MICE sector in the Auckland region and to what extent environmental initiatives are considered important by various stakeholders. The response to date by businesses in the sector has also been explored. This will enable planning to be undertaken in relation to likely future impacts of environmental issues and strategies that can be utilised to address these issues. It will also be of interest to assess how important are environmental considerations in the decision taking processes of final users of MICE facilities, e.g. conference delegates, event attendees, exhibitors etc.

4.3.2 Technology Trends

It is no secret that significant technological advancements have been made in the last few decades. The advancements that have been made, particularly in the areas of information and communication technology, have had a significant impact on the MICE sector in all parts of the world. Virtual meetings, webcasts, podcasts, teleconferencing, video conferences, distance learning, blogs and interactive multimedia are becoming increasingly common tools in the corporate world (Braley, 2008; Gecker, 2008; Hinkin & Tracey, 2003a).

Within the UK, Weber & Ladkin (2004) utilised a Delphi study to assess the trends affecting the sector. They found that increasingly delegates and event planners expect to see a high standard of technology in venues and expect to be able to conduct registration and payment for events online. They also found that enhanced communication between event planners, venues and suppliers has meant that lead times for events are decreasing. A similar trends was also found in the USA during the 2008 Meetings Market Survey conducted by *Meetings and Conventions* magazine (Braley, 2008).

Numerous articles can be found in trade publications such as *Meetings and Conventions* magazine and *Successful Meetings* magazine highlighting the ways in which technology can be utilised to improve outcomes for events. One such example is the use of technology to assist in speaker - audience interaction. In September 2008, Experient (an event management company) announced a partnership with Zuku, (a web and mobile communications company). This partnership will allow meeting attendees to send comments and questions to speakers as well as participate in surveys and polls via mobile phones (Alderton, 2008). Another recent innovation is the use of electronic nametags for participants. These allow convention planners to track attendance at different sessions and use this information for analysis and future planning purposes (Freed, 2008). Within the New Zealand context it is not known which technologies are being adopted and the extent to which they are being used. This is an important factor for the current study to explore due to the influence that this could have on the sector.

One trend that is perhaps of most importance to the MICE sector is the move towards telephone, video and web conferencing. Ford & Peeper (2007) amongst others are of the belief that these types of technologies will change the way in which people meet. In contrast to this belief is the view that these alternate means of conducting meetings will supplement, rather than replace, face to face meetings. Weber & Ladkin (2004) found that this was expected to be the case by a Delphi panel representing the Australian MICE sector. Within the United States, the 2008 Meetings Market Survey found that while there has been an increase in the use of technology, particularly in the corporate sector, only 24% of corporate meeting planners and 9% of association event planners said that video and web events had replaced face-to-face meetings (Braley, 2008).

Despite the fact that some US event planners have indicated that web and video events have replaced face-to-face meetings, the number of meetings held and their associated attendance figures have still increased in the past 2 years. The only exception to this overall trend is attendance at association meetings other than annual/bi-annual conventions (Braley, 2008). In contrast to this, in the UK the number of events held and attendance at these events fell by 13% between 2006 and 2008 (HBI Meetings Management, 2008). Within the Auckland region it is thought that the number of events held is increasing slightly, for statistics from the

Convention Activity Survey indicated the number of events increased 0.2% between July 2006 and July 2007. The number of delegates attending events over the same period increased 5.9% (Tourism Auckland, 2007b). In examining these figures, it is also important to note the global economic crisis that occurred in 2008. The impacts of this crisis are discussed in the next section of this chapter.

4.3.3 2008 Global Economic Crisis

The global economic crisis of late 2008 has had significant impacts on the business community across the world. Here in New Zealand, there was significant media attention paid to the fact that the economy was in recession and the impact it had on businesses. Particular attention was paid to the number of companies down-sizing and the resulting number of redundancies. The government responded to this by introducing a number of initiatives including the 9 day fortnight scheme.

There was significantly less attention paid to the other impacts of the recession, including the impact on the Meetings, Incentives, Conventions and Exhibitions (MICE) Sector. In tough times it is common practice for businesses to cut costs where ever possible. Often times, the first budgets to be cut are those for travel, training and conferences and meetings. This obviously had an impact on those companies whose business is servicing this market.

Due to the economic climate, there is evidence (particularly from overseas) that many companies were tightening their belts where spending was concerned. For the MICE sector this is significant. Training, meetings and travel expenses, unlike many other business costs, are not fixed. In many cases they are also not seen as essential for the day to day running of the business and with technological advancement there are a range of options that can replace traditional face-to-face methods. Therefore, it makes sense that in a recession these are the first budgets to be slashed.

In the USA, the impact of the economic climates was felt by venues and associated suppliers across the country. Many incentive programmes disappeared and meetings were postponed or cancelled. For instance in Orlando, 2008 had record group cancellations and 2009 looked likely to exceed the 2008 record (Gecker & Hall, 2009). While in the UK, a BCG/EAMP survey showed that 54% of organisations were planning to cut back on company events, and 33% to cut back on individual training (Phillips, 2009).

There is some evidence to suggest that New Zealand companies were not focussing as strongly on reducing costs as businesses in other countries. Only 9% of 7200 businesses surveyed by Grant Thornton placed cost reduction as the most important tactic for surviving the recession ("Innovation preferred to cost-cutting in NZ ", 2009). This does not however mean that New Zealand businesses were not cutting costs.

On the other side of the coin, there are several arguments as to why businesses may not have cut spending on meetings and training. These arguments can be simply summed up with the expression ‘face-to-face works best’. There is a substantial body of literature that confirms that face-to-face communication is often more effective than online or telephone based communication for building personal relationships (e.g. Fernando, Daniel, Greg, & Jay, 2007; Gerardo & Giuseppe, 2007; Robert, Rajiv, Dhruv, & Kenneth, 2006; Suraksha & Melewar, 2008). This is in part because physical cues, body language and eye contact are important parts of communication process (Isler, 2009). In our current era of relationship marketing, opportunities to establish and develop personal relationships with customers are paramount to organisational success (Peter, 2003). A recent survey of 942 senior sales executives from Asia, Europe and North America, conducted by Meeting Professionals International, found that 52% of respondents believed face to face contact at events is the best way of accelerating business relationships. They also found that 30% of respondents thought that event marketing offered the best return on investment (Event Marketing Institute, Meeting Professionals International, & Johnson, 2009). It might also be argued that within New Zealand both generally and in business there is a predisposition toward face to face conducting of business. The population is small, and within any given sphere of work there is a high degree of personal knowledge of others that possibly favours the social aspects of conducting business. Forer & Parrott (1991) commented how, as early as in the 1970s, improvements in communications were being utilised to develop closer personal social contacts, and it can be argued that this may be a feature of New Zealand's culture that has developed from both the preferences of indigenous Maori peoples and a colonial history where personal contact was an important means of overcoming tendencies to parochialism.

Business events are also an important part of effective human resource management. Open almost any text book on Human Resource Management (e.g. Kramer, McGraw, & Schuler, 1997; Stone, 2008) or Organisational Behaviour (e.g. Wood et al., 1998) and you will find claims that money in the form of wages or salary, bonuses or incentive payments is not the only, and in many cases, the most effective motivator. A recent study found that the most important aspects of work to employees are exciting and challenging work, opportunities to learn and develop and the people whom they work with. Face to face meetings have the potential to generate excitement about work, develop employees and build relationships between co-workers (TBA Global, 2009).

Given this evidence regarding the importance of meetings it cannot be assumed that New Zealand organisations were mimicking the trends seen oversees in relation to MICE events, especially given the findings of the Grant Thornton survey previously discussed. Much of the data in this current study, particularly that data gained from venues, were collected during the official period of recession in New Zealand. Examining the effects the recession had on the MICE sector in the region is an important element in the analysis of the data. It has also been born in mind that some of the issues and trends that have arisen are a result of this recession, and not as a result of other trends and issues discussed in this section.

4.3.4 Competition and Convention Centre Development

It is widely acknowledged within the literature that competition to host MICE events has increased dramatically in the past two decades and it seems likely that this trend will continue (Chen, 2006; Morla & Ladkin, 2007; Ryan et al., 2007; Weber & Ladkin, 2003; Weber & Ladkin, 2004). This increase in competition can be seen at two levels within the sector.

Firstly, there has been a significant increase in the number of destinations looking to attract MICE events. Weber and Ladkin (2004) observed that new destinations are challenging more mature destinations. Within the US alternate destinations such as Las Vegas, Atlanta and Orlando are challenging the traditional major city convention destinations (Hinkin & Tracey, 2003b). In the Asian region, the growth in the number of purpose built convention centres has been exponential in the past two decades, with countries such as Korea, China and India moving from not being major players to having some of the largest and most modern facilities in the world (Lee & Lee, 2006; Nelson 2006; Weber & Ladkin, 2004; Yoo, 2004). Within the US 53 new convention centres were built in the five year period 2000 -2005 (Clark, 2006). Furthermore, many countries, including Japan, Malaysia, Singapore and Australia, have in place formal government developed plans to increase the number of events hosted (Australian

Government Department of Energy Resources and Tourism, 2008; Dwyer, Mistilis, Forsyth, & Rao, 2001). Obviously the development of these facilities and plans overseas, particularly in Asia has resulted in increased competition for New Zealand in general. As will be shown in the findings of this thesis, this increase in competition is of concern for a number of stakeholders in the Auckland region.

New Zealand is not exempt from this trend, with both the Sky City Convention Centre and the Christchurch Convention having been constructed in the past two decades (Louis, 2004) and others being built in smaller centres including the Claudelands Event Centre opened in 2011 in Hamilton, that built in Rotorua in 2009 and once completed in Mystery Creek at about the same time. Allan Trotter, CEO of CINZ supported former Auckland City Mayor, Dick Hubbard in his call for a further purpose built convention centre to be constructed in Auckland (CINZ, 2005). These calls resulted in a detailed feasibility study being conducted by Auckland City Council in partnership with the Ministry of Economic Development. The report on this feasibility study was made available in September 2009 and concluded that a purpose built international standard convention centre capable of hosting at least 3500 delegates would bring benefits to New Zealand. Furthermore it concluded that Auckland was an appropriate location for this centre to be built (Auckland City Council & Ministry of Economic Development, 2009). Furthermore the new Auckland Council appears to also be in support of the construction of such a convention centre in the region. *Auckland Unleashed*, the Auckland Plan discussion document specifically identified the construction of an international standard convention centre as being crucial for developing the region as a destination (Auckland Council, 2011c), a case that was subsequently recognised in June 2011 when the government commenced negotiations with Sky City when that company sought changes in the gaming laws and the development of more gaming tables and slot machines to help offset the potential investment of NZ$350 million in a new Convention Centre ((TVNZ, 2011). This is discussed later in the thesis, but it does raise the question as to whether the company actually thought a return on investment was possible without these required changes that would benefit its core business of gambling.

There is a significant amount of literature regarding convention centre development. This literature for the most part, examines the pros and cons of developing a new or expanding an existing convention centre (e.g. Clark, 2006; Fenich, 1992, 2002; Morgan & Condliffe, 2006). Often it generally concludes that developing new or expanding existing convention centres is a significant financial investment and to be successful in delivering the benefits of MICE tourism requires significantly more than just a convention centre. In the case of the Auckland region this appears to known and the Auckland Regional Development Plan, Auckland Visitor Strategy and Major Events Strategy both highlight the importance of developing supporting infrastructure in the region (Auckland Plus, 2007, 2008; Auckland Regional Council, 2006a).

Evidence of New Zealand’s interest in attracting international conventions can be found in the Conference Assistance Program funded by New Zealand Major Events and administered by Conventions and Incentives New Zealand (CINZ) (New Zealand Major Events, 2006). In addition CINZ also actively markets New Zealand as a convention and incentive destination both onshore through the annual Meetings tradeshow and offshore at tradeshows such as AIME held in Melbourne and IMEX in Frankfurt (CINZ, 2008).

On a second level, the number of individual venues offering MICE facilities and services has increased dramatically within individual destinations. Weber and Ladkin (2004) found in their

Delphi study that the proliferation of new venues was seen as a major concern by those in the UK MICE sector. Also within the UK, HBI Meeting Management, who conduct an annual survey of the MICE sector, have found that the use of unusual venues (as defined in Table 4.1) is increasing. During 2007, 17.7% of HBI client corporate meeting planners utilised unusual venues (HBI Meetings Management, 2008) such as boats and theme parks.

Within the Auckland region, there are several unusual venues offering some MICE services and facilities including Auckland Museum, Kelly Tarlton's Underwater World and Ellerslie Race Track (Tourism Auckland, 2008). What is not known is the extent to which these types of venues are being utilised and how increased competition is being viewed by existing venues within the region.

4.4 NBES Australia

The National Business Event Study (NBES) conducted in Australia over the period 1 July 2002 to 30 June 2003 was essentially a situational analysis for the sector within Australia. The NBES study is significant for informing this current study, both as an example of best practice and for the way in which the study was carried out and as a source of information on the potential difficulties that could be encountered.

The objectives of the NBES were to provide information regarding the contribution of the sector to the Australian economy and enhance knowledge regarding delegate decision making. This information was seen as valuable for informing decision making processes for the sector and providing benchmarks for assessment of performance in the future (Deery et al., 2005). The study was essentially an update and extension of the 1999 "Meetings Make Their Mark" report undertaken by the then Bureau of Tourism Research, with the 1999 study believed to be the first study of its kind and magnitude ever undertaken (Moore, 2005).

At the time when the study was undertaken, the process of developing the 2003 Tourism White Paper: *A Medium to Long Term Strategy for Tourism* had just commenced. The May 2002 release of a Tourism Discussion paper had recently been released to canvass industry and community views of the issues associated with tourism growth in Australia and was the first stage in this process (Australian Government, 2003). Interestingly, while the NBES was not a part of the formal consultation process for the development of the White Paper, the White Paper does specify the Business Event or MICE sector as an area which should be given considerable attention in regard to further development (Australian Government, 2003). This was essentially facilitated through the creation of Tourism Events Australia, which unlike New Zealand Major Events, is tasked with the dual roles of assisting to attract major events to the country and the promotion of the country as a business event destination (Tourism Australia, 2005). The NBES is now utilised by Tourism Events Australia as a key source of information regarding the size and contribution of the sector (Tourism Australia, n.d.).

As the focus of the NBES was on measuring the size and contribution of the sector nationally, the emphasis was on ensuring that information was collected from each component of the sector, in each location within Australia. There were 6 key components or populations looked at within the study, and data were collected from the capital city and regional areas of each State and Territory (Deery et al., 2005).

Due to the large amount of data gathered, and the diverse and geographically dispersed nature of the target populations, several techniques were used to distribute and collect the questionnaires, including email invitations to complete web-based questionnaires, mail and fax (Deery et al., 2005). Each of the survey distribution methods used in this project included a self-completed questionnaire. While self-completion of questionnaires offers advantages, especially in terms of cost and ability to distribute to large populations and/or samples, there are also several disadvantages of using a self-completion method (Jennings, 2001). Of most relevance for this project is the limited opportunity to build rapport between researchers and respondents, slow speed of data collection and low response rates (Jennings, 2001).

These potential drawbacks of the self-completion method were recognised within the NBES research design. This process was managed centrally by the Centre for Tourism and Hospitality Research at Victoria University (VU) on behalf of the Sustainable Tourism Cooperative Research Centre (STCRC). However the actual data collection was done at STCRC Research nodes that were established for this project in various regions around the country. Each research node included a STCRC researcher, an industry representative and Convention Bureau representative (Deery et al., 2005). Regional based data collection was designed to minimise these potential problems by encouraging engagement with respondents and facilitating a follow up process to assist in reducing the time taken and increasing the response rates.

This follow up process proved to be of great value to the study and substantial efforts were expended in follow up attempts to raise the response rate, particularly from event venues. However despite these efforts, response rates in some areas were still considered poor (Deery et al., 2005). This issue required acknowledgement and careful consideration in the design and implementation of the current research project if a higher response rate was to be achieved because, as described later, some of the same issues arose in this study.

4.5 Conclusion

The MICE sector is a complex one, comprised of a number of components. While there has been significant research conducted on some aspects of the sector, there are many areas where there is very little information. This is particularly the case for New Zealand and the Auckland region. While some basic statistical information is available, there is little information regarding who the key stakeholders are in the region, their roles and how the interact. Without this knowledge there is insufficient information available to successfully plan for and develop the sector. MICE visitors are obviously a desirable group of visitors for the Auckland region to attract and without an understanding of the sector as it stands and proper planning it is unlikely that the full potential of this sector will be reached. The following chapter sets out the methodology by which this research was conducted.

Chapter 5 - Methodology

5.1 Introduction

The previous chapters have provided a detailed review of the situation in Auckland prior to the research of the MICE sector in the Auckland region and of a pertinent wider academic literature. The region, its system of governance and Auckland Council's desired future for the region have been highlighted. In particular, the council's desire for Auckland to become a 'world city' and the imperative that this places for the further development of the MICE sector was also discussed. Chapter three addressed sustainability and the need for strategic planning if the Auckland MICE sector is to be developed in a sustainable manner. Chapter four looked at defining the MICE and its components, before examining some of the key issues and trends affecting the sector globally. It was noted in this discussion that these previous studies had been conducted overseas, primarily in the European and American markets, so could not be assumed to hold true in New Zealand's unique context. This chapter draws on each of these previous chapters to describe the methodology employed in this research project.

The first section of this chapter outlines the reasons why this research was undertaken and the specific research objectives of the thesis. This is followed by a discussion around paradigms and the beliefs and stances underpinning this research. The later part of the chapter looks at specific methods employed in this research. The research is divided into two phases. The first phase is focussed on generating information that can be used to conduct a situational analysis of the MICE sector. This phase of the research employs a combination of interviews and questionnaire surveys to collect data from stakeholders on both the supply and demand sides of the sector. The second phase of the research employs the Delphi technique. The goals of this second phase are to confirm the findings from the first phase, and to assess levels of, and build consensus around what the current position is and what are the strategic priorities for the sector.

5.2 Research Purpose and Objectives

The purpose of this research is two-fold. Firstly the research was undertaken to address the lack of literature regarding the MICE sector in New Zealand generally and specifically in the Auckland region. While there is an ever growing body of literature regarding all aspects of the MICE sector, it still remains true that there is little that addresses the New Zealand context and in particular Auckland as the major centre of the country's population. Secondly, through addressing this shortfall of information, the research aimed to provide a platform on which the region can, should it choose to, develop a strategic plan to further develop the sector. The goals of this research were to: 1) provide a comprehensive picture of the sector in its current state, as well as to identify the opportunities and challenges the sector is likely to face in the future; and 2) to propose a framework that draws on these findings and can be used to guide the development of a strategic plan for the sector.

To achieve these goals the specific objectives of this study were:

1. To develop a clear understanding of the current state of the Meetings, Incentives, Conventions and Exhibitions (MICE) sector in the Auckland region, including who the key stakeholders are, what roles these stakeholders are playing and the nature of the relationships and power structures that exist in the sector.
2. To understand trends occurring in the sector from both the supply and demand perspectives.

3. To enhance understanding of the link between strategic planning and sustainability.
4. To forecast the likely development of the sector with reference to Auckland.
5. To identify aspects of the sector that require further development in order to meet demand.
6. To assess if a consensus exists within the sector that a strategic approach to development is required in order to maximise opportunities and ensure long term sustainability.
7. To propose a planning and management structure that allows for on-going strategic development of the sector based on the data gathered from various stakeholders.

As was highlighted in the introductory chapter to this thesis, it was originally intended that the findings of this research would be handed over to Tourism Auckland, and that they would then use these findings as a base for implementing a strategic planning process, driven by Tourism Auckland. However, the region has been through a considerable change in the system of governance, and Tourism Auckland no longer exists as a standalone body. With the formation of the Auckland Council and the creation of Auckland Tourism Events and Economic Development, there have been several staffing changes and a shift in strategic direction for the region. Due to these changes, the original intentions of this research have shifted somewhat and the thesis culminates in a series of recommendations to ATEED regarding the findings of this research and the need to implement a strategic planning process for the MICE sector.

5.3 Case Study Research

Case studies are not a new approach to tourism research, and have even been said to be the most dominant form that tourism research takes (Carter, Baxter, & Hockings, 2001; Franklin

& Crang, 2001; Oppermann & McKercher, 2000). Yin defines a case study as "an empirical inquiry that investigates a contemporary phenomenon within its real life context, especially when the boundaries between phenomenon and context are not clearly evident" (2003, p. 13). Using this definition is easy to see why case study research is frequently used with the realm of hospitality and tourism research. Tourism as a phenomenon is by its very nature, complex, and difficult to separate from the context in which it occurs (Franklin & Crang, 2001; Leiper, 1979).

Case studies as a research method are often stereotyped as being "a weak approach, typically used in exploratory studies, which often lead to un-confirmable conclusions" (Xiao & Smith, 2006, p. 739). However, the counter argument to this stereotype is that case studies are the best way that we can refine theories and use that theory to apply effective interventions in complex situations (Stoecker, 1991). Given that the primary goals of this research were to develop an understanding of specific nature of the MICE sector in the Auckland region, and to use this understanding to propose a framework on which strategic planning could be undertaken, a case study approach was deemed as most appropriate for this research.

5.4 Paradigm - Ontology and Epistemology

This research thus sought to examine the above objectives, including assessing the degree to which a consensual understanding existed within the stakeholders in the industry that would permit the development of a strategic vision that could inform the development of subsequent policy. In many ways this perhaps represents the core research issue, because in the absence of (a) a consensus and (b) a clear identification of that consensus the other objectives listed above might only be partially achieved.

Underlying this process is the basic assumption that strategic planning is the most likely way in which this can be achieved. Accordingly this research has been designed in such a way as to follow the process of strategic planning in order to test the hypothesis. This requires the use of a combination of both qualitative and quantitative research methods; a mixed method approach (Creswell & Plano Clark, 2007).

The field of mixed method research is plagued by questions regarding the way in which paradigms are used in the development of the research process (Teddlie & Tashakkori, 2003). There are several different positions regarding this issue; however for this project a pragmatic position will be employed. A pragmatic position places the emphasis on the research question and infers that the methodology used is based on that most likely to result in the objectives of the study being achieved (Creswell & Plano Clark, 2007).

Whilst a pragmatic approach to designing the research method will be employed, it is still possible to identify the underlying ontological and epistemological beliefs underpinning this research design. Post-positivism is the stance that is most dominantly evident in tourism research design, and is a paradigm that draws on a critical realism set of ontological beliefs and an objective epistemology (Guba & Lincoln, 2005).

The methodology used for this research relies primarily on deductive reasoning to test the existence of a set of pre-determined factors. This implies that there is a ‘real’ truth, however it is acknowledged that this absolute ‘real’ truth is impossible to discover, and what can be discovered is ‘probable’ or ‘consensual’ truth (Guba & Lincoln, 2005). This implies the existence of ‘constructed truths’, that is truths contextualised within given structures at certain times. The post positivist believes that reality is embedded in the social and historical context of the situation being examined (Allmendinger, 2002). This view is appropriate for looking at a specific industry sector, due to the anticipated homogeneity of the sector in terms of industry norms, and shared knowledge and experiences.

The post positivist position also acknowledged that both groups and individuals have a constantly changing knowledge base (Baranov, 2004). The implication for this in terms of research is that assumptions can be challenged at any time. This is deemed appropriate for a strategic planning and management process, as this is a dynamic on-going process that requires the current situation to be constantly monitored.

The post positivist perspective acknowledges that multiple methods of reasoning can be found within one process of discovery and justification (Baranov, 2004). This permits a range of enquiry methods, including qualitative methods, to be used in the one discovery process. This can be seen in the mixed method approach to be used for the study.

One of the more commonly utilised designs used in mixed methods research is a triangulation framework (Creswell & Plano Clark, 2007). In a triangulation design data is collected using a more than one method and the findings from one method are used to corroborate the findings from other methods (Rallis & Rossman, 2003). This design has been employed in this research with findings from the questionnaire surveys being utilised to corroborate the findings from the interviews. In addition to the triangulation design, this research also employs an explanatory design process, where the findings from the first phase of the research and used to develop the instrument used in the second phase, and the second phase seeks to confirm the findings of the first phase (Creswell & Plano Clark, 2007). In this research the triangulated interview and questionnaire findings were then confirmed using the Delphi technique.

It is this second phase of the research that elements of a constructionist paradigmatic approach are evident, particularly in relation to model development and implementation. Approaching research from a constructionist perspective implies that the research is inductive in nature, based on co-constructed realities and co-created findings, with the researcher taking a subjective position involved as a participant in the research process (Guba & Lincoln, 2005). In the latter parts of the current project that researcher was required to move from the impartial, objective position held while conducting the situational analysis, to the role of a participant involved in the construction of knowledge and facilitating consensus (Guba & Lincoln, 2005).

5.5 Phase 1 – Generating Information

As shown in the previous chapters, there are a large number of issues, trends, processes, relationships and components of the MICE sector that need to be explored in order to have a comprehensive understanding of the sector as it currently stands. The following tables present a summary of what information was required from each component within the sector and how these data were collected.

The framework, shown below in tables 5.1 and 5.2 was designed to generate sufficient information to give a comprehensive picture of the current status of both the supply and demand sides of the industry. The methods of data collection included a combination of self-completion questionnaires and structured interviews. The following section outlines the specific method used for collecting and analysing data from each of the target populations.

Table 5.1 - Framework for Conducting a Situational Analysis - Demand

AUDIT			
Visitors – Demand	Numbers and Trends	Satisfaction	Method of Data Collection
Delegates	• Composition of travel parties • Travel modes and accommodation • Other activities undertaken • Expenditure • Demographic details • Place of residence	• Previous visits • Factors influencing decision to attend • Satisfaction ratings • Repeat visit intentions • Recommendation intentions	Self-complete Questionnaire distributed and collected at event
Exhibitors	• Composition of travel parties • Travel modes and accommodation • Other activities undertaken • Expenditure • Demographic details • Organisation represented and place of business	• Previous visits • Factors influencing decision to attend • Satisfaction ratings • Repeat visit intentions • Recommendation intentions	Self-complete Questionnaire distributed and collected at event
Event Organisers/Hosts	• Type of event and nature of host organisation • Event attendance • How and where advertised • Event planning including timing • Event expenditure • Event income • Demographic details of event organiser	• Factors influencing destination selection • Satisfaction ratings • Intentions to host in Auckland again • Recommendation intentions	Self-complete Questionnaire distributed via email after initial telephone contact.

Table 5.2 - Framework for Conducting a Situational Analysis - Supply

AUDIT			
Industry – Supply	Inventory and Trends	Performance	Method of Data Collection
Venues	• Number of venues and capacities • Accommodation provision • Reliance on MICE business • Systems and processes – HRM, consumer feedback, promotion, quality accreditation, environmental initiatives, trends identified by venues.	• Uptake of accommodation • Satisfaction of consumers (from above) • Occupancy rates	Semi-Structured face-to-face interview
Suppliers including: Accommodation Transport and Tours A/V and other equipment Activities Catering Security Services Memorabilia	• Types of suppliers and numbers • Reliance on MICE business • Systems and processes – HRM, consumer feedback, promotion, quality accreditation, environmental initiatives, trends identified by suppliers.	• Satisfaction of consumers (from above)	Semi-Structured face-to-face or telephone interview

5.5.1 Event venues

5.5.1.1 Population Identification

Event venues were the first population from which data were collected. Venues and contact persons were identified from the Business Tourism Auckland (BTA) and Conventions & Incentives New Zealand (CINZ) databases. A total of 37 venues were identified in the region. Four declined to participation and a further three were not available during the period the interviews were conducted. Herein lays a limitation of this research. There are other venues in the Auckland area offering space suitable for MICE events, such as the numerous motels that have space available for meetings. However, identifying and interviewing all of these venues was not feasible and the lack of advertising on the two main bodies promoting Auckland as a MICE destination is viewed as a signal that MICE events are not a major part of the business at these venues.

5.5.1.2 Data Collection

Representatives from 30 venues that host MICE events in the Auckland region were interviewed between March and September 2009. The representatives were primarily Business Development Managers or General Managers of the venue. Each semi-structured interview was an average of approximately 45 minutes in duration and was digitally recorded.

Interview questions were drafted from the literature and divided into 4 sections. The first section looked at the extent to which venues relied on MICE related business, the second the accommodation offerings provided by each venue, and the third the systems and processes in place at the venue to manage a number of issues including human resources, client and guest feedback, and environmental issues. The fourth and final section looked at issues currently affecting the operation of the business in regard to MICE and the expected opportunities and challenges for the business for the coming 5 years. A copy of these interview questions can be found at Appendix A.

Initially there was also a self-completion questionnaire that venues were asked to complete giving numbers of events and attendees for the previous financial year. This was abandoned part way through the collection process, as the inconsistency between each venues' record keeping systems meant that this questionnaire was providing no useable data.

Table 5.3 – Profile of participating venues

Location	Capacity	Hotel/Lodge	Multipurpose & dedicated conference centre	Sports Facility (including stadiums and racetracks)
CBD	Small <60pax	1	-	-
	Medium 60-150pax	2	-	-
	Large 150-400pax	3	-	-
	Extra large 400+pax	4	3	-
Suburbs	Small <60pax	-	-	-
	Medium 60-150pax	-	-	-
	Large 150-400pax	5	1	-
	Extra large 400+pax	1	3	3
Regional	Small <60pax	4	-	-
	Medium 60-150pax	-	-	-
	Large 150-400pax	-	-	-
	Extra large 400+pax	-	-	-

In addition venues were asked to assist in populating other samples. They were asked who their key MICE suppliers were and to provide a point of contact with event organisers that were hosting events at the venue. Venue representatives were emailed the interview questions, the self-completion questionnaire, a project information sheet and a consent form approximately 1 week prior to the scheduled interview.

Table 5.3 provides a profile of the venues that participated in the study in terms of location and capacity. Locations are defined as being CBD, suburban or regional for those located outside of the metropolis but are still considered to be within the Auckland region.

5.5.1.3 Data Analysis

The data from the interviews were analysed using inductive content analysis with the support of the software programs ‘Atlas TI’, Leximancer and CatPac. Each has their own advantages in that Atlas Ti can effectively aid coding, Leximancer generates graphics from the text and CatPac is intuitive in its use. In Atlas Ti interview recordings were assigned as primary documents and quotations selected and coding applied directly in the audio files, while the Leximancer and Catpac analysis was conducted on the notes that were taken during the interviews by the interviewer.

Priory themes were identified from the literature in each area as summarised in table 5.4 below. In addition several other themes emerged during the analysis. These are discussed later, with the findings drawn from the interviews. For the most part the themes described are those that initially came from the reading of the text and the classifications generated with the aid of Atlas TI, and specific mention is made of the other programs where it was felt they helped clarifying relationships between themes.

Table 5.4 – Summary of priori themes identified for venue interviews

Economic Climate	It was expected that venue representatives would have noticed the economic climate impacting on the number and size of events being held.
Competition	Venue representatives were expected to identify that there had been an increase in competition to host events, both from within the region and from other destinations.
Environmental Issues	It was expected that venues would report an increase in attention to environmental concerns. Additionally it was anticipated that most venues would have in place environmental policies and initiatives.
Technological Advancement	It was anticipated that venues would have noticed impacts from technological advancement. It was the expected that this would have been mostly felt in terms of requirements from meeting organisers.

5.5.2 Event/incentive travel suppliers

5.5.2.1 Population Identification

As discussed in the previous section, 'Data collection for Venues', a list of key suppliers for the sector were primarily drawn from the venue interviews. A further 5 suppliers were drawn from the BTA and CINZ databases.

The population was then further divided into sub populations of:

- Event management, theming and staging
- Audio visual (A/V) suppliers
- Lighting and equipment hire services
- Security services
- Labour hire
- Event transport providers
- Caterers

Suppliers within each category were selected for inclusion in the sample if they were nominated by more than one venue or they held BTA or CINZ membership. Table 4.5 summarises the composition of the sample and the number of participants for each category.

Table 5.5 – Composition of supplier sample and participants

Category	Number in sample	Number of participants
Event theming / staging	4	2
A/V suppliers	3	1
Lighting and equipment hire services	3	2
Security services	1	0
Labour hire	2	1
Event transport providers	3	2
Caterers	5	3

5.5.2.2 Data Collection

Representatives from MICE suppliers in the Auckland region were interviewed between September 2009 and February 2010. The representatives were primarily Business Development Managers or General Managers of the supplier. Each semi-structured interview was an average of approximately 45 minutes in duration and was digitally recorded.

Interview questions were drafted from the literature and divided into 3 sections. The first section looked at the extent to which each supplier relied on MICE related business. The second section related to the systems and processes the supplier had in place to manage a number of issues including human resources, client and guest feedback, and environmental issues. The third and final section looked at issues currently affecting the operation of the business in regard to MICE and the expected opportunities and challenges for the business for the coming 5 years. A copy of these interview questions can be found at Appendix C of this thesis.

As was the case for the venue interviews, supplier representatives were emailed the interview questions, a project information sheet and a consent form approximately 1 week prior to the scheduled interview.

5.5.2.3 Data Analysis

The data from the interviews were analysed using inductive content analysis. The previously mentioned textual analysis software applications were used for this analysis. Interview recordings were again assigned as primary documents and quotations selected and coding applied directly in the audio files in Atlas Ti, and the interview notes used for analysis in the other two applications.

Priori themes were identified from the literature in each area, summarised in table 5.6 below. In addition several other themes emerged during the analysis. These are discussed later, with the findings drawn from these interviews.

Table 5.6 – Summary of priori themes identified for supplier interviews

Economic Climate	It was expected that supplier representatives would have noticed the economic climate impacting on the number and size of events being held.
Increase in the number of venues	Supplier representatives were expected to have noticed an increase in the number of venues in the region hosting MICE events.
Environmental Issues	Supplier representatives were expected to have noticed an increase in attention to environmental issues by both clients and the venues they worked within.
Technological Advancement	It was anticipated that suppliers would have been affected by technological advancements. It was expected that this would be more the case for some suppliers (e.g. A/V companies) than others (e.g. catering providers)

5.5.3 Event organisers

5.5.3.1 Questionnaire Design

The questionnaire was designed in order to gather the information identified as needed from event organisers during the literature review and early discussions with those involved in the industry. This required information is summarised in table 5.1 and includes details regarding types and sizes of events being held in the region, planning processes and reasons why events were held in Auckland, as well as how well the region performed in hosting these events.

The questionnaire is divided into nine sections: 1) Event details; 2) Delegates (completed for events that included a meeting, conference or incentive gathering component); 3) Exhibitors and exhibition attendees (completed for events that included an exhibition component); 4) Planning; 5) Destination selection; 6) Satisfaction; 7) Expenditure; 8) Income; and 9) Personal details of the event organiser. The questionnaire was pilot tested on two associates of the researcher who have been responsible for organising events in the past and then submitted for approval by the Waikato Management School Ethics Committee. Once ethical approval was granted the questionnaire was made available for completion as either a word document that could be completed electronically or printed, and also as a web based questionnaire, running on a Waikato Management School server. A copy of this questionnaire can be found at Appendix F of this thesis.

5.5.3.2 Sample Selection and Data Collection

The sample of event organisers to be surveyed was selected using a combination of convenience and purposive sampling. The sample frame was generated through three main means: a Google search of the internet for events being held in the region over the study period; venue representatives who were asked to supply details of event bookings for the research period; and the BTA database of events being held during the data collection period.

Initially the selection of events and event organisers was conducted on a purposive only basis with the researcher selecting events that covered a range of event types, type of host organisation, number of attendees, duration, and venues. However, as the research progressed it became clear that generating a sufficient response rate using this method would not be possible. A convenience style of sampling was then employed in combination with the purposive elements in trying to minimise the skew towards association or university conferences that were readily accessible via the internet. As generating this sample frame was an on-going process during the period of data collection sample units were continually added until the end of the data collection period (March 2010).

The number of useable responses is significantly less than the original target of 60 responses and herein lies a limitation of this research. The researcher encountered numerous difficulties in contacting event organisers. Of the 30 venues who participated in the study only nine were willing to contact event organisers on the researcher's behalf. This resulted in contact details for 14 event organisers being passed to the researcher. Each of these event organisers were contacted via phone and invited to complete a questionnaire. When contacted using this process event organisers a little over half were willing to participate, with 8 of these organisers completing a questionnaire. However, as this process did not generate a large enough sample frame, the search for event organisers was widened to include events listed on the internet. A total of 23 organisers from this search were subsequently contacted. The response rate generated from this approach was significantly lower than the previous approach with only a further 3 organisers being willing to participate.

5.5.3.3 Data Analysis

All responses were entered into an excel spreadsheet. Due to the small sample size statistical analysis was limited to calculating mean scores and standard deviation for questions using a likert type scale and frequencies for questions with categorical answers. Other questions were analysed using thematic analysis.

5.5.4 Attendees/delegates

5.5.4.1 Questionnaire Design

The questionnaire was designed in order to gather the information identified as needed from delegates during the literature review. This required information is summarised in table 5.1 and includes the demographic profile of event attendees, travel details, factors influencing the decision to attend the event, satisfaction and repeat visitation.

The questionnaire is divided into five sections: 1) Travel details; 2) Decision to attend; 3) Satisfaction; 4) Expenditure; and 5) Demographic details. The questionnaire was submitted for approval by the Waikato Management School Ethics Committee. Once ethical approval was granted the questionnaire was made available for completion as either a word document that could be completed electronically or printed, and also as a web based questionnaire, again running on a Waikato Management School server. A copy of this questionnaire can be found at Appendix E of this thesis.

5.5.4.2 Sample Selection

Event organisers, who agreed to participate in the study, were asked for permission to survey delegates attending their events. As a result of this questionnaires were distributed at a total of eight events. Five of these events were association conferences, one event was a public exhibition, one event was an incentive dinner gathering and the final event was a corporate training session. This resulted in 104 event attendees completing the questionnaire.

5.5.4.3 Data Collection

Questionnaires were distributed to event attendees as either paper based copies at the actual event or as a link to the web-based survey, or were emailed to attendees immediately following the event. Neither approach generated a high response rate, although the most successful response rate was achieved for a small training session where six of the seven attendees completed the questionnaire.

A number of approaches were used to distribute hard copies of the questionnaire at the event, including placing them in conference packs that were distributed at registration, placing them on chairs during a morning tea break, and handing them to attendees as they exited the venue.

In all cases where questionnaires were distributed at the event a locked ballot box was provided for submitting questionnaires and freepost envelopes were available for those unable to complete the questionnaire during the actual event. The average response rate from the delegate survey was 10.8%.

5.5.4.4 Data Analysis

Analysis of the data from event attendees was completed using Statistica v.8. All usable responses were entered in a Statistica worksheet and a range of descriptive statistics were compiled including a demographic profile, geographic origin profile, overall importance of selection factors, overall satisfaction ratings and travel behaviour profile.

5.5.5 Exhibitors

5.5.5.1 Questionnaire Design

As was the case for event organisers and delegates the questionnaire was designed in order to gather the information identified as needed from exhibitors during the literature review. This required information is summarised in table 5.1 and includes the demographic profile of event exhibitors and the profile of the organisations they represent, travel details, factors influencing the decision to exhibit the event, satisfaction and repeat exhibiting intentions.

The questionnaire is divided into five sections: 1) Organisation details; 2) Travel details; 3) Satisfaction; 4) Expenditure; and 5) Demographic details. The questionnaire was submitted for approval by the Waikato Management School Ethics Committee. As before, once ethical approval was granted the questionnaire was made available for completion as a printed document. A copy of this questionnaire can be found at Appendix G of this thesis.

5.5.5.2 Sample Selection

Like the delegate sample, the sample of exhibitors was gained by asking event organisers who agreed to participate in the study for permission to survey event delegates. This resulted in questionnaires being distributed at four events, three conferences and one public show. Unfortunately most exhibitors elected not to complete the questionnaire and only 14 useable responses were collected, all from exhibitors at the public show.

5.5.5.3 Data Collection

Questionnaires were distributed to all exhibitors at each of the four events described above. A total of 18 questionnaires were distributed at the conferences and a further 89 questionnaires were distributed at the public show. In the case of the public show, each questionnaire was distributed with a freepost envelope to allow the exhibitors to complete the questionnaire after the show and then return to the researcher. For the questionnaires distributed at the conferences, the event organisers distributed the questionnaires to the exhibitors who were then asked to place completed forms in the same locked box that was provided for delegates. Given that this approach did not yield any completed forms, this approach would not be used again in future research.

5.5.5.4 Data Analysis

Analysis of the data from event attendees was analysed using Statistica v.8. All usable responses were entered in a Statistica worksheet and a range of descriptive statistics were compiled including a demographic profile, geographic origin profile, organisation profile, overall satisfaction ratings and travel behaviour profile.

A limitation of this study is that only event organisers, delegates and exhibitors who organised or attended an event in the Auckland region were surveyed. The result of this is that this research does not address the instances were Auckland is not chosen or the reasons why Auckland is not being chosen.

5.6 Phase 2 – Situational Analysis, Determining Desired Future Position and Strategic Priorities

The second phase of this project utilised the Delphi technique as the means of data collection. The Delphi technique is a tool for collecting opinions from and achieving a consensus of opinions from a group of respondents, using multiple rounds of questionnaires and feedback between rounds (Tersine & Riggs, 1976).

The purpose of this second phase of the research was to order the information gathered in the previous phase, through triangulation of the data and confirmation of findings by relevant supply side stakeholders. This information was then used to determine what the supply side of the sector viewed as the priorities to be addressed in a strategic plan for the sector. The importance of stakeholder input and achieving consensus for success of any strategic planning process is well documented. While there are a number of other techniques for managing this process, the Delphi technique has two major advantages. Firstly, Delphi is useful in collecting information from a larger number of participants as it does away with the constraint of numbers that can be involved in a meaningful face-to-face discussion. It also minimises the time and costs constraints that may prevent participants from meeting in one place at one time (V. W. Mitchell, 1991). Maximising the number of stakeholders involved and minimising the time and cost to participate are seen crucial to the success of this project.

The second major advantage of the Delphi technique can be found in the quality of information that can be generated from this approach. The anonymity of the approach overcomes problems of influences of peer group pressure and institutional loyalties. Additionally the process allows participants time to think through ideas before responding and to reconsider their position after receiving feedback (Garrod & Fyall, 2005). Depth and quality of information gathered will determine the extent to which this project is successful in meeting set objectives.

5.6.1 Panel Selection

The importance of panel selection to the success of the Delphi process is well documented. Delphi panels are usually made of experts in the field of the area in which they are formed, however the literature on determining what constitutes an expert is limited (Story, Hurdley, Smith, & Saker, 2001). It is however recognised that having a variety of expertise and for panel members to share a genuine interest in the outcome of the process are important criteria for panel selection (Wright, 2006; Critcher & Gladstone, 1998; Garrod & Fyall, 2005; Miller, 2001b; Mitchell, 1991; Preble, 1984; Story et al., 2001; Tersine & Riggs, 1976).

Panel size is an issue of contention in the literature, with recommended panel sizes varying from a minimum of 3 (Manoliadis, Tsolas, & Nakou, 2006) to a maximum number limited only by the time and money constraints of the researcher (Mitchell, 1991). Most studies agree that panel selection should be based on achieving a heterogeneous panel within certain constraints such as shared interests, degrees of experience but permitting for example, where appropriate, a mix of genders and ages, while the size of the panel should allow for attrition (Garrod & Fyall, 2005; Miller, 2001b; Mitchell, 1991; Story et al., 2001). It was believed that for this study a panel size of approximately 15 participants would achieve those objectives (Tersine & Riggs, 1976).

Bearing in mind those considerations, in this study the panel was selected from those who had previously participated in an interview, based on the following criteria:

- Panel members should have considerable experience within the MICE sector and demonstrate understanding of strategic planning processes.
- Panel members should hold positions of influence within the organisations they represent.
- The panel as a whole should represent a range of sector stakeholders and include representatives of each survey target population (excluding attendees/delegates).

During the course of the interviews with venue and supplier representatives all interviewees were advised of how the information collected during the interviews would be used and the Delphi panel process was explained. Interviewees were then asked if they might be willing to participate as panel members. A note was taken of the interviewees who indicated they were willing to participate as panel members. Prior to the first questionnaire round these interviewees were contacted via email to determine if they were still willing to participate. A total of 30 invitations were sent out. Of these invitations, 13 interviewees were willing to participate in the Delphi panel. A copy of this email of invitation can be found at Appendix H of this thesis.

The panel represented a good cross section of the interviewees that had previously participated in the study. Eight of the panel represented venues, which included two multipurpose facility, two dedicated conference facilities, a smaller regional boutique hotel, two CBD hotels and one suburban hotel. Of the remaining five panel members, two were professional event managers; one represented an audio-visual provider, one an event equipment hire provider and one a coach transport company.

During the course of the three rounds of questionnaires, there was significant attrition. All 13 panel members completed the first questionnaire. The number completing the second questionnaire dropped to 12 and in the third and final round eight completed questionnaires were collected from panel members.

5.6.2 The Delphi Questionnaire

The questionnaire that was distributed to the Delphi panel was divided into two parts. The first part addressed the current situation. In this part the questionnaire contained a series of statements addressing a strength, weakness or current issue identified through the interviews and questionnaire findings discussed in the previous two chapters of this thesis. In the first round panel members were asked to rate each statement on how true they believed the statement to be on a scale of one to seven, where one meant they believed the statement to be not at all true and seven meant the statement was completely true. Following the statements an open ended question asked panel members to provide a brief explanation as to why they had rated the statements in the way they did.

The second part of the questionnaire was regarding the panel members' perceptions of the opportunities and challenges that would present themselves to the sector over the coming five to ten years. This section was drawn from the opportunities and challenges identified from the previous findings. Again the panel members were presented with a series of statements which they were asked to rate on the same scale as for the first part of the questionnaire. Finally an open ended questionnaire asked to the panel members to briefly explain the reasons behind their ratings in this section. A copy of this questionnaire can be found at Appendix I of this thesis.

5.6.3 Delphi rounds

As previously stated, the Delphi process uses multiple rounds of questionnaires to elicit responses from the Delphi panel. As one of the purposes of the Delphi process is to develop consensus amongst panel members, the number of rounds used varies between projects (Garrod & Fyall, 2005; Holey, Feeley, Dixon, & Whittaker, 2007). In this research the Delphi process consisted of three rounds. The first round questionnaire presented panel members with a series of statements divided into two parts: statements regarding the current issues; and statements regarding future opportunities and challenges. These statements were drawn from the combined findings of the interviews and questionnaire surveys conducted in the first phase of this project. Panel members were asked to rate each statement on how true they believed each statement to be using a likert type scale of one to seven. A score of one indicated they thought the statement was completely untrue, and a score of seven indicated they believed the statement to be completely true. In addition to rating each statement, panel members were asked to briefly explain why they had scored the statements the way they did.

The second and third rounds of the Delphi process were when the process of building consensus took place. In these rounds the panel was presented with the same series of statements, along with the mean score derived from all panel members from the previous round. Panel members were asked to re-score each statement and where they disagreed with the mean score from the previous round by 1.5 points or more, they were asked to provide a reason for their score for that statement.

5.6.4 Data Analysis

Analysis of the questionnaires was undertaken using a combination of basic statistical and content analyses of the comments made by the panel members. Scores were entered into an Excel spreadsheet and basic statistics were calculated at the conclusion of each round, and the mean score from rounds one and two were included in the questionnaire for the following round. As the Delphi process had the dual purposes of assessing and building consensus, and determining priorities for inclusion in a strategy document, the analysis of the questionnaires needed to address both consensus on and truth of the statements.

For assessing how true the panel believed each of the statements to be, the mean score for each statement was used. As previously stated these mean scores were calculated at the conclusion of each round; however, the scores from the third and final round were used to make the final assessment. Scores of over 4.5 were deemed as representing a position of at least ‘partial belief’ in the statement by the panel, with scores of over six deemed as being ‘almost completely true’ by panel members. Scores of less than 2.5 were deemed as ‘untrue’, and the scores between 2.5 and 4.5 were deemed as ‘neutral’.

To assess levels of consensus there are three aspects of responses that can be measured, these being: 1) the aggregated mean scores of responses; 2) the move towards central tendency; and 3) the stability of responses between rounds (Holey et al., 2007). This research utilised central tendency to assess consensus, and more specifically the mean score and standard deviation for each statement. While this approach has been used by numerous researchers in the past (e.g. Donohoe, 2011; Green, Hunter, & Moore, 1990; Murphy & Olsen, 2009), it was still necessary to determine an acceptable value for standard deviation at which it was deemed that a consensus had been reached (Greatorex & Dexter, 2000). As the panel had been asked to provide reasons for their score if they disagreed with the mean score by 1.5 or more, it was determined that a standard deviation of less that 1.5 would indicate that consensus had been achieved.

5.7 Conclusion

The focus of this chapter has been on outlining how this research was undertaken. The chapter began by describing the dual purposes of this thesis and outlining the objectives that were set for this research. The dual purposes of contributing the academic literature, and providing tangible results for the Auckland MICE sector, resulted in a mixed methods approach being employed.

The research was conducted in two phases, the first being focussed on information generation and drawing strongly on a post positivist paradigm. A framework for the data collection in this phase was developed based on the findings of the literature review. Implementation of this framework saw a range of data being collected from stakeholders on both supply and demand sides of the sector through a series of interviews and questionnaire surveys.

The second phase of the research focussed on ordering the previous findings and building consensus amongst sector stakeholders. This phase employed the Delphi technique to: 1) aid in triangulation of data from the previous phase; and 2) to assess and build consensus regarding the current state and future direction of the Auckland MICE sector. This phase, while still drawing on post positivism, drew on constructionist perspectives in the creating of knowledge and consensus amongst stakeholders.

The following two chapters focus on the findings from the first phase of this research. In the next chapter the findings from the supply side of the sector are discussed. These findings are the result of the interviews that were undertaken. The chapter after looks at the findings from the demand side of the sector. These were generated through the survey questionnaires.

Chapter 6 – Current Position: Supply side findings

6.1 Introduction

This chapter is the first of three chapters outlining the findings from the data collection conducted for this project. In this chapter the findings from a total of 41 interviews is highlighted. These interviews were conducted during the period March 2009 and April 2010, and included interviews with 30 venue representatives and 11 supplier representatives from across the Auckland region. These interviews form the data collection that was undertaken from the supply side of sector as discussed in chapter 3 and were designed to provide the information required from this portion of the sector as summarised in table 4.2. The interviewees were either business development managers or senior managers from the organisations they represented and as such had good knowledge of the practices of the organisations and the future direction the organisations were hoping to take.

The first section of this chapter provides a summary of the findings from the interviews with venue representatives. This information is presented in the same order as the questions were presented to interviewees. The next section presents a summary of the findings of the interviews conducted with representatives of MICE suppliers. Like the presentation of the venue interviews, it also follows the order of questioning. The final section of this chapter brings the findings from both sets of interviews together and begins the discussion regarding the strengths, weaknesses, opportunities and challenges that the MICE sector in Auckland is currently experiencing. This theme is continued in the following chapter where the findings from the demand side of the sector are introduced.

6.2 Venues

6.2.1 Inventory

Table 6.1, below, provides a summary of the inventory of venues hosting MICE events in the region. This has been broken down by type of venue, capacity and proximity to the CBD. The numbers shown in brackets indicate the number of venues who participated in the study.

Table 6.1 – Inventory of MICE venues in the Auckland region

Location	Capacity	Hotel/Lodge	Multipurpose & dedicated conference centre	Sports Facility (including stadiums and racetracks)
CBD	Small <60pax	3 (1)	-	-
	Medium 60-150pax	5 (2)	-	-
	Large 150-400pax	4 (3)	-	-
	Extra large 400+pax	4 (4)	3 (3)	-
Suburbs	Small <60pax	3	-	-
	Medium 60-150pax	-	-	-
	Large 150-400pax	5 (5)	1 (1)	-
	Extra large 400+pax	1 (1)	3 (3)	7 (3)
Regional	Small <60pax	2 (2)	-	-
	Medium 60-150pax	2 (2)	-	-
	Large 150-400pax	-	-	-
	Extra large 400+pax	-	-	-
		29 (20)	7 (7)	7 (3)

6.2.2 Accommodation

Two thirds of the venues that participated in the study were accommodation providers and therefore can offer accommodation onsite. A further seven venues including six dedicated conference centres and multipurpose facilities had in place one or more preferred supplier arrangements with accommodation providers.

Only three venues did not offer assistance with organising accommodation other than providing a list of nearby providers to event organisers when asked. That being said, they also pointed out that they are rarely asked for assistance with organising accommodation, with most events being held at that venue being one day or less in duration.

One of these venues stated “We can’t really go after the international stuff, because we don’t have the accommodation”. The importance of having accommodation was also recognised by two other venues without accommodation onsite. One of these venues packaged accommodation and transport into their daily delegate rate. The other used a lot of site visits and included accommodation details in their quotes. While the approach used was different, the objective was the same; to overcome the perceived barrier of not having accommodation on site.

Accommodation offered by venues was all of a higher standard with the minimum rating of the accommodation being 4 stars. The vast majority of accommodation was Qualmark rated. The exceptions were four regional boutique style properties.

Use of accommodation by attendees at multi day events varied greatly. The four participating regionally located venues reported that multiday events tended to be almost 100% residential. As one respondent noted, “Normally all of them would stay, the only time they wouldn’t was if they live locally or they were a facilitator just coming out for the day”.

CBD hotels on the other hand generally found that between around 20% and 90% of delegates stayed on site when attending multi day events. Many respondents found this a difficult question to answer as it varied greatly between events. “It depends who it is, if it’s an association a lot of the members come from down country but..........that’s a real hard one” was such a response from one informant. These properties tended to estimate an average of around 20-30% would require accommodation. Other properties, particularly the five star rated properties were more confident in providing estimates. These estimates tended to be higher, ranging from around 50% up to 85-90%. Many of these venues also pointed out that those delegates who were not utilising their accommodation were mostly local residents.

A number of the interviewees pointed out that it is becoming increasingly difficult to determine the proportion of attendees that are utilising the accommodation offered. This is primarily attributed to the increased use of the internet for booking travel and accommodation on the part of attendees. Many of the bookings that would have, in the past, come through PCO’s, are now being made via online booking intermediaries. One CBD hotel also noted that they were working to avoid this issue by ensuring that the rate offered for bookings through PCO’s was the cheapest rate that can be obtained.

6.2.3 Contribution to revenue

The contribution that the MICE sector makes to venue revenue varies greatly across the region from negligible contribution to 90% of revenue being generated from the MICE sector. However, overall most venues that participated in the study receive at least 10% of their revenue from MICE business. Of the four venues that reported receiving less than 10% of their revenue from MICE business, two had extenuating circumstances and were hoping to increase this percentage significantly in the next few years. Several other hotels also indicated that they were hoping to increase their level of MICE business “Our main challenge is shifting from Asian wholesale to corporate business..............there's no better business than conference business" noted one informant.

"Generally you can use the rule that MICE is 20% of our activity and 40% of revenue" and "It is probably about a third of the total revenue here" were the comments from two representatives from Multipurpose and Sports facilities. These quotes are typical of venues in these categories as most appear to rely quite heavily on MICE business as an income stream.

CBD hotels rely on MICE business for around 20% of their revenue. This does vary a bit between hotels; generally the hotels with larger capacity MICE facilities are more reliant on MICE business than the smaller venues.

6.2.4 Systems and Processes

6.2.4.1 Feedback Systems

All the participating venues had some processes in place to obtain and action feedback. There are significant variances in how feedback is collected, who it is collected from and what is done with feedback once it is collected.

Chain hotels generally have comprehensive systems in relation to client feedback. All but one of the chain hotel participants make use of a feedback form for collecting responses from clients. These feedback forms are generally distributed to directly to the client after the event. Several hotels have a web based system for this feedback collection. Most hotels also reported using at least one other method for collecting feedback from clients. The most common of these methods was post event follow up with the client, either in person or over the phone.

All of the participating chain hotels, and all but one of the other hotels, have in place guest feedback forms. In most cases these forms are placed in guest rooms prior to guest arrival, however a couple of hotels have additional questionnaire drops which are pushed under doors at night. There are also a couple of hotels that have a web based feedback form. These forms vary a great deal in content; from a customised form for every guest, to a generic “please provide any comments” style of form. Only one hotel mentioned having the forms available in the actual meeting rooms, meaning feedback was only obtained directly from event attendees that were staying in house.

Most other venues also have in place a feedback form for collecting feedback from the client and like the hotels feedback is also sought after the event during a follow up visit or phone call. Venues other than hotels tended to place more emphasis on having someone present at the event as a means of obtaining and auctioning feedback.

All venues have processes to action feedback, although only a few venues report actions taken back to client unless required to do so do appease a complaint. Systems for ongoing monitoring of feedback vary greatly between events. Many of the chain hotels and a few of the other larger venues use either specific venue management software or hotel management system with a venue management module. These software packages allow feedback to be entered and tracked for both the venue as a whole and for individual clients. Hotels may also choose to examine web data bases such as Expedia.com for on-line reviews by guests of their evaluations, but generally it is difficult to distinguish between those who are attending as a result of a conference or other event, and those who are not.

While most participants primarily use feedback to monitor and improve service standards, some other uses of feedback were highlighted. Venues who outsource their catering rely on client feedback as a source of information when reviewing catering contracts. Two of the participating hotels use client and guest feedback when planning refurbishments and other investments in the property.

6.2.4.2 HR Practices

All but one venue had in place formal processes to manage human resources. Policies and procedures were in place to cover recruitment, induction, training and performance management. Chain hotels, not surprisingly, tended to have the most comprehensive set of policies.

Within many of the hotel venues that participated, policies and practices showed a focus on employee development and retention of staff and knowledge. This is evident in practices such as advertising vacancies internally first and training and development programmes that are in place.

Several of the larger venues had in place some form of casual labour pool. In the case of hotels, many of these casual employees were able to work in more than one area of the hotel, and were roistered on shifts as and when required. These casual labour pools were reported to be primarily comprised of students.

The regional venues were more prone to the effects of seasonality, with the winter months being particularly quiet and the summer being much busier. To cope with this fluctuating demand they maintain a core of permanent full time and part time staff and engage seasonal employees during the warmer months. Many of the seasonal employees return to work at the venue for several consecutive summers. A good proportion of these returning seasonal employees are tertiary students who return home for the summer break.

6.2.4.3 Marketing Practices

Venues in the region use a variety of different mediums and techniques to promote their venues, including:

- Exhibiting at trade shows
- Sales calls
- Advertising in print including newspapers and industry publications
- Advertising on radio
- Listing in printed and web based planners, including the BTA, CINZ and Corporate Events Guide
- Web sites, including their own and directory sites
- Purchase of Google ad words
- Promotional materials
- Emails blasts to databases
- PO box drops
- Encouraging repeat clientele
- Word of mouth
- Special offers

Although there are numerous marketing practices in use, almost of all of the respondents gave one of four factors as being most important: Personal contact, exposure, good service and the Internet.

Venues with dedicated sales executives or business development managers generally regard personal contact with clients as the most important vehicle for selling their business. The majority of chain hotels fall in this group, along with over half of the multipurpose and sport facility venues. This personal contact is usually achieved via a combination of personal sales calls, familiarisation visits, exhibiting at trade shows and attending networking functions and road shows.

Several of the venues that mentioned personal contact as being most effective also mentioned that having good exposure and being ‘in front of mind’ amongst event organisers is also really important in terms of attracting event bookings. Three of the other multipurpose/sport facility venues believe this is probably the most important factor. As a result of this these venues spread their advertising budget over a number of different places, including exhibiting at trade shows, print advertising, radio advertising and web presence.

A number of venues, especially those located outside the CBD, had a high proportion of repeat clientele, perhaps because they admitted to having a strong focus on encouraging repeat clientele. One way in which this achieved is by providing good service. They also tend to have a significant client database which they email on a regular basis with news of special offers and any improvements which have occurred at the venue. Word of mouth advertising and referrals are also important for these venues.

Many participants also mentioned the importance of the Internet. “When people start planning an event nowadays they are usually in an office, in front of a computer”. All of the participating venues maintain some level of web presence, with their own website and listing in one or more directory sites/online planners. Five venues discussed other means by which they boost their web presence, including listing on as many sites as possible and purchasing Google ad-words and search positions.

6.2.4.4 Environmental Initiatives

Amongst the participating venues there is a strong focus on environmental concerns. Almost all have in place or are working on policies of some kind. The extent of these policies does vary with chain hotels generally having the most developed of these policies. That said, a number of the multipurpose, sport facility and independent hotel venues also have in place comprehensive systems and processes.

In terms of accreditation, there is a far greater number of venues with accreditation under the Green-Globe scheme than there is under the Qualmark Enviro scheme. This is, perhaps, not surprising, given that the Qualmark Enviro scheme is still relatively new.

In terms of motivations for having environmental initiatives in place, many of the venues reported that having some form of accreditation was a requirement for hosting government and some corporate events. Two of the larger multipurpose venues highlighted specific events that they had hosted as being the trigger for developing and implementing environmental policies.

Another reported motivating factor for having in place environmental initiatives was the resulting cost saving to the organisation. Things such as power saver light globes, dual flush toilets, and individual air conditioners in rooms were commonly reported as being in place. While only two venues reported good corporate citizenship as being the prime motivation for having in place environmental initiatives, many venues had in place practices that go above and beyond those reported above, including donating staff time for conservation efforts, and having green teams in place that are constantly coming up with new initiatives.

6.2.5 Current concerns and issues

In this section of the interview participants were asked to identify issues and concerns that were currently affecting the operation of their business. They were asked to identify venue specific issue as well as issues arising from the sector or the region more generally. Two forms of analysis were used for evaluating the answers as to what were the current concerns in relation to these two aspects. The first was to take a general overview using the textual analysis software, and Figures 6.1 and 6.4 display a list of ‘key’ words identified for each question with the venue specific factors being addressed first. These were then subjected to thematic analysis from which specific sub-themes were also identified. As was noted in Chapter 5 of this thesis this analysis utilised three software application CatPac, Leximancer and Atlas Ti. The Leximancer and Catpac analysis was conducted using the interview notes, and the Atlas Ti analysis was conducted on audio files recorded at each interview.

6.2.5.1 Issues and Concerns resulting from venue specific factors

As seen in Figure 6.1 most of the answers revolved around the location of the venue, with an ancillary issue being the availability of car parking. Examples of the latter point include the following comments:

> Parking can be issue especially during events at racetrack
>
> Expensive car parking – don’t know how long we can sustain providing free car parking for delegates
>
> Car parking – can’t offer discounts for event attendees. Currently we are in negotiations with Wilsons car parking across road to see if this can be addressed.

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
SPACE	8	6.5	30	24.8
STAFF	7	5.6	18	14.9
VENUE	7	5.6	25	20.7
CAR	6	4.8	21	17.4
PARKING	6	4.8	23	19.0
REDEVELOPMENT	6	4.8	23	19.0
T	6	4.8	24	19.8
CURRENTLY	5	4.0	19	15.7
GOOD	5	4.0	16	13.2
LIMITED	5	4.0	20	16.5
LOCATION	5	4.0	20	16.5
BUSINESS	4	3.2	15	12.4
ACTIVITIES	3	2.4	10	8.3
AWAY	3	2.4	9	7.4
BIGGER	3	2.4	12	9.9
CBD	3	2.4	12	9.9
ISSUE	3	2.4	12	9.9
LAST	3	2.4	12	9.9
LOTS	3	2.4	9	7.4
MARKET	3	2.4	12	9.9
MINUS	3	2.4	12	9.9
NICE	3	2.4	12	9.9
PAX	3	2.4	7	5.8
PLUS	3	2.4	12	9.9
REALLY	3	2.4	12	9.9
REFURBISHMENT	3	2.4	12	9.9
SMALL	3	2.4	9	7.4
STAFFING	3	2.4	12	9.9
SUMMER	3	2.4	10	8.3
TEAM	3	2.4	12	9.9

Figure 6.1 - Words and their Frequencies assessed by CatPac - Venues

With reference to the question of location, this was generally seen as a given which, in the words of one respondent had both its positive and negative aspects. For some not being in the CBD represented an advantage while equally for others a CBD position was a plus.

Two other sets of comments also emerge from an analysis of the text. The first related to refurbishment needs, which might be said to be seen as a necessity although often of course being, at least momentarily, a disruption to the normal flow of business. The second relates to the issue of staffing.

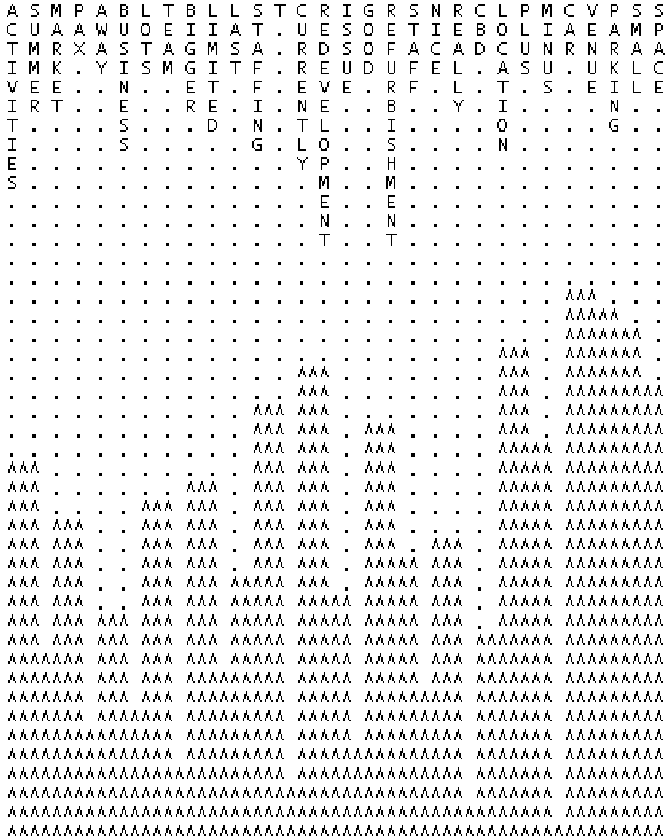


Figure 6.2 - Dendogram of Issues Perceived by Venues

Among the comments made about staffing were:

> Have found it hard to figure out what to do with kitchen staffing and finding someone willing to work on an on-call basis
>
> Casual work and pay rates for Spotless affects quality of staff and pool of staff means staff have not worked together or at venue. Affects standard of service and grooming of staff.

But on the other hand a third respondent noted:

> Staffing no problem and can't see it being a problem in Auckland.

Figure 6.3 Leximancer Analysis of Issues - Venues

-

- All of these themes are again confirmed by the Leximancer generated perceptual map. Refurbishment is associated with redevelopment which is a response to the market's needs and issues of limited space, including car parking space. The word 'business' comes from the CBD, and it is within this part of the map that the text refers to the location of the venue. Hence, in addition to a CBD location often being seen as attractive to conference and event organisers, so too was a location at the airport.

6.2.5.2 Issues and concerns resulting from factors related to the region or the sector as a whole

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
ECONOMIC	19	8.1	71	30.5
AUCKLAND	17	7.2	60	25.8
SITUATION	16	6.8	59	25.3
BUSINESS	13	5.5	44	18.9
EVENTS	11	4.7	41	17.6
SHORTER	10	4.2	38	16.3
LEAD	9	3.8	35	15.0
SMALLER	9	3.8	31	13.3
MARKET	8	3.4	28	12.0
RECESSION	8	3.4	32	13.7
TOURISM	8	3.4	23	9.9
BIG	7	3.0	25	10.7
CITY	7	3.0	26	11.2
DUE	7	3.0	28	12.0
IMPACT	7	3.0	26	11.2
MEETINGS	7	3.0	26	11.2
DEFINITELY	6	2.5	23	9.9
GOOD	6	2.5	24	10.3
MOMENT	6	2.5	21	9.0
REALLY	6	2.5	24	10.3
T	6	2.5	24	10.3
BETTER	5	2.1	20	8.6
BOOKINGS	5	2.1	20	8.6
GOING	5	2.1	19	8.2
HAVING	5	2.1	20	8.6
INTERNATIONAL	5	2.1	14	6.0
MAYBE	5	2.1	20	8.6
MONTH	5	2.1	17	7.3
CONFERENCING	4	1.7	14	6.0
COUNCIL	4	1.7	16	6.9

Figure 6.4 Count of Frequency of Words Used by Venues

Figure 6.4 clearly indicates that a general concern existed about the economy and the recession, and this is further reinforces by the dendogram shown in Figure 6.5. The right hand side of the dendogram groups together statements about delayed and small events as respondents spoke of the changed market conditions. For example:

> The economy – the current situation is definitely a factor but is not as bad as the hype. We are still getting good enquiries, but the smaller meetings and cutting back on accommodation. June and July this year are looking like they will be quite quiet.

And again:

> The economic situation – there has been a huge drop in corporate travel especially ex USA but also Australia. Incentive trips gone, none booked for this year. We had been having 2 big ones per year so this has had a big impact on us…. Lead times are much shorter - have experienced a 200pax booking with one just month's lead time. This makes it tough with reference to accepting bookings as never know what is likely to happen.

And again:

> The recession – quite a few businesses in area are downsizing or relocating. Many of the bigger companies have cancelled their Christmas functions. … Everyone seems to want faster, better, but for less at the moment.

Such comments were echoed by almost all of the respondents.

The centre of the dendogram shown in Figure 6.5 has a series of words that were often associated with comments about the Council – that in the words of one respondent it was lacking 'omph' while another commented on how disparate it was and how people failed to work together unlike Rotorua, while yet another respondent voiced the view that Auckland was losing some of the events to Hamilton. Another commented that Auckland was primarily a 'pass through' rather than a stay region. Yet there were others who countered this view – stating that Tourism Auckland did well in promoting the city and that the city was an attractive place to visit. In addition some respondents looked forward to the formation of the 'Supercity'.

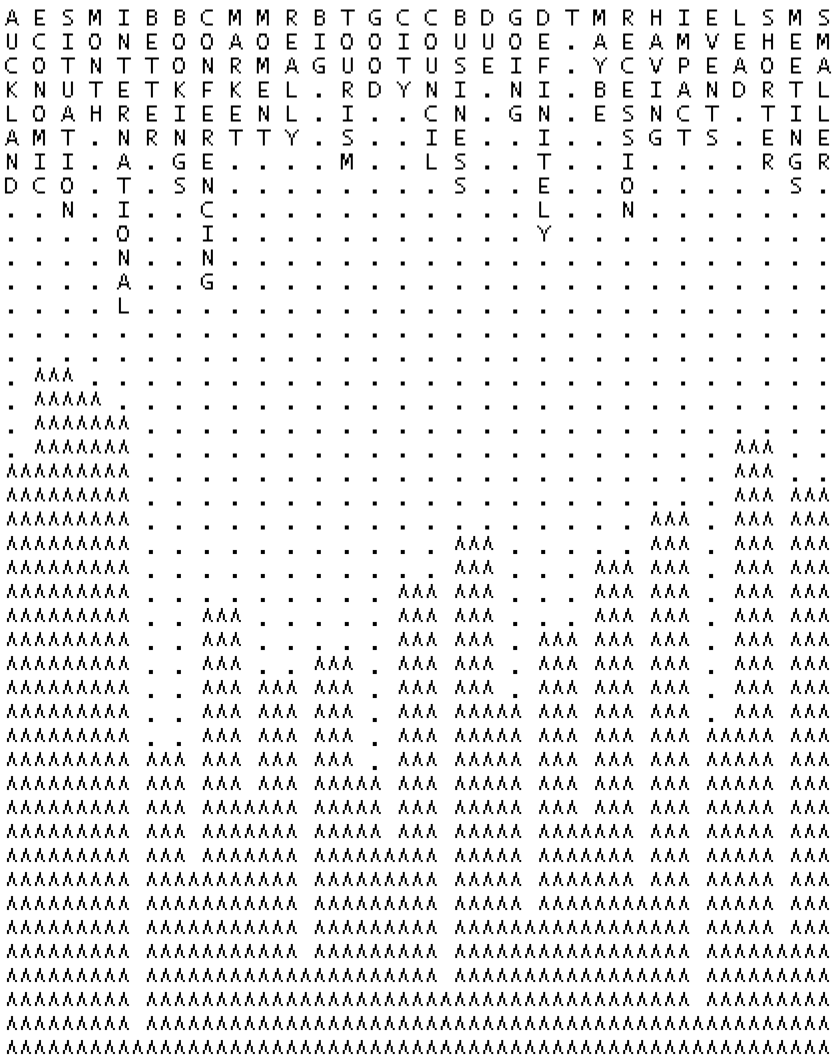


Figure 6.5 - Dendogram generated by CatPac of current issues

The analysis conducted with Leximancer supports the above interpretation. It can be seen from Figure 6.6 that the market, business situation were serious and impacting on booking at the current time.

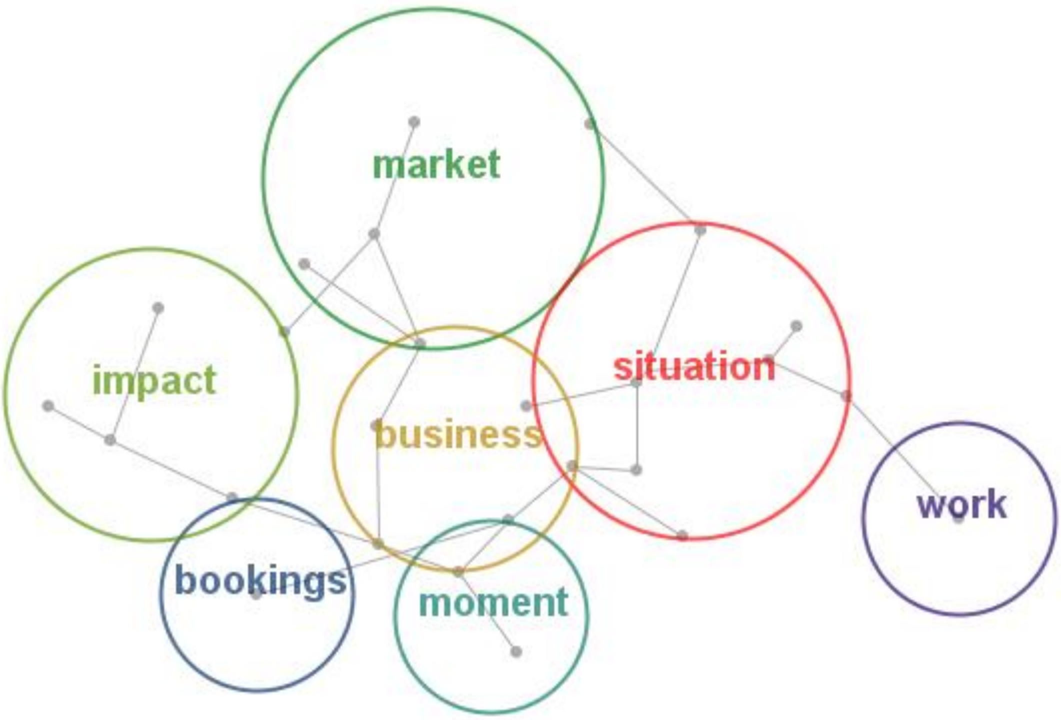


Figure 6.6 Leximancer analysis of current issues

Taking these themes and identifying sub-themes led to the following analysis.

6.2.5.3 Economic Climate

Almost all venue representatives reported the recession was impacting on the events they were hosting. The most commonly reported impacts were in terms of the number of events being held and events being cancelled or postponed. All of the venues with large capacity greater than 400+ pax and many of the smaller capacity venues reported having at least one larger event having cancelled. However, “at the end of the day people still have to meet” as one large venue representative stated. For the smaller day to day meetings it seemed to be business as usual.

Smaller venues, particularly those with a strong repeat client base, reported that regular events had not been occurring as frequently as in previous years. One such venue representative said "some of our regulars were running a course every month for new staff and such. Well for a period of time they dropped off altogether" while another venue stated that "rather than run a course for five people they just combine it with the next one". A couple of the five star rated hotels also said that some of the incentive events they would normally host were not occurring this year.

An impact that was reported by almost every venue representative surveyed was that event organisers are trying to reduce the costs associated with holding events. The most common way in which venue representatives thought this was occurring was by events becoming smaller and shorter. "Businesses are being more selective about who they invite to events" and "Instead of spreading the meeting out over a leisurely three or four days they are working squeezing it into two days and working until ten at night" were amongst the responses from venue representatives when asked about this. Other venues noticed an emphasis on reducing accommodation costs: "They are squeezing the conference into two days so they only have to pay for one night's accommodation and at the end of the day locals go home, where before the company would have paid for them to stay on site with everyone else".

Another way that venues felt that organisers were trying to reduce costs was seen in choosing cheaper options, for example "Instead of doing a whole sit down menu, they are maybe doing a working lunch" and "They might do buffet instead of a plated meal and not do the whole a/v they were planning on".

Lead times for planning events have also become significantly shorter. “We had an enquiry yesterday for 130pax meeting next week” and “June is looking really quiet, but then this May was looking really quiet but we ended up being really busy” clearly indicate just how short lead times have become in some cases. Many venues said that it seems that organisers were putting off making a decision until the last minute.

Many venue representatives commented on the apparent price war and the very cheap day delegate and accommodation rates being offered by some of the CBD hotels: for example comments included “One of our biggest issues at the moment is the rate dumping that is going on, it’s not just accommodation, I’m talking meeting space, food and beverage”. Another venue representative said “there are a lot of venues undercutting at the moment, they’re doing ridiculous deals. I don’t know how they are making any money to be honest.”

Interestingly none of the venues interviewed said that they were discounting more than usual. Most hotel venues offered discounts to MICE organisers in the form of a package that included meeting space, day delegates and accommodation. Several hotels referred to offering incentives such as every 10th delegate free or free accommodation for the organiser. Other venues stated they did not discount at all and preferred to value add and relax terms and conditions to make it easier for the organiser.

However it is not seen as all doom and gloom. Most venues felt business was starting to pick up again and that there were numerous new business opportunities available. Less expensive venues, especially those outside the CBD, felt that they had gained some business due to the fact the organisers do not want to be seen to be spending money unnecessarily. One venue summed this up as "We say we are the politically correct choice. You can still have the sit down dinner and the wines and everything, but you're not seen as spending over the top".

While a number of venues reported a decline in the business from overseas, some had seen an increase in bookings from Australia and within New Zealand that normally would have gone elsewhere. One venue representative said "for companies that would normally conference in Asia or the Pacific Islands for them to say 'this year we're conferencing in Australia', they can't really do that, so they come to New Zealand instead". Other venues said they have had new business from people running seminars on how to cope with the recession. All of the venue representatives' interviewed were optimistic regarding 2010 and beyond, with many stating they had received good enquiries and bookings. However, most recognised the challenge before them of getting organisations spending again.

6.2.5.4 Perception of and Promotion of Auckland

Six of the participating venues expressed concern regarding the way in which Auckland is perceived by outsiders. They were concerned that "Oh no not Auckland again" and "JAFA" (Just another f*#%ing Aucklander) were a good indication of how New Zealanders outside of Auckland tend to regard the city and its residents. One of these venues also noted the differences in reception they got when dealing with potential clients from Sydney, compared with Melbourne. She stated that "overall people from Melbourne are usually happy to come to Auckland, but Sydney people don't really want to."

Several venues also mentioned the challenge of attracting international conferences to the region. Amongst the factors that make this a challenge is believed to be the perception that

New Zealand is a long way away from anywhere else and the increased level of competition from other destinations.

Another area of concern expressed by venues was the way in which Auckland was being promoted, both as a MICE destination and more generally. Several issues were raised, the first being the number of organisations involved in tourism promotion for Auckland including the various city and district councils, Tourism Auckland, the Heart of the City Group and on an international level, Tourism New Zealand and CINZ. One venue representative said “It’s confusing enough for us not knowing whose doing what, imagine what it’s like for consumers getting all those mixed messages”.

The general feeling amongst venue representatives was that Auckland had a number of attributes that make it an appealing and sellable MICE destination.

Three venues pointed out that they thought the new Tourism Auckland campaign ‘This is Auckland’ was “right on the money” in the words of one interviewee. What was meant by this interviewee is that the new campaign would assist in overcoming the perception that Auckland is lacking in activities and attractions. However, all three of these venues, along with a further three, did not believe the region was going far enough to distribute the message behind the campaign. One example given was in relation to the Meetings trade show: “Compared to the other regions the Auckland stands were boring. Wellington had a chocolate fountain. Queenstown had glowing fireplaces. What did we have? A little Auckland logo on each stand.”

6.2.5.5 Supporting Infrastructure

A number of respondents pointed to the perceived lack of infrastructure in the region as potential turnoffs for event organisers. The main infrastructure identified as being needed within the region is an international standard convention centre. Nine of the venues identified this as important for the region. However, other development was also identified as needed if Auckland is to develop their MICE sector. Included on this list are public transport systems, activities and attractions, and a cruise ship terminal.

6.2.5.6 Increasing Competition

Over half of the venue representatives identified increased competition as impacting on the way they are doing business. Ten representatives identified that the market in the region was becoming more competitive, with an increased number of venues and a number of venues with increased capacity. Eight of the respondents stated that the competition from other New Zealand destinations and overseas destinations was having an impact on their business. The strategies for dealing with this increased competition were primarily marketing based, e.g. creating a point of difference, encouraging loyalty etc. However, some respondents had recently completed or were in the process of refurbishment. Increased competition was not seen by the respondents as purely a current issue, with most also identifying it as a future challenge.

6.2.6 Challenges and Opportunities for the Coming Five Years

In terms of an overview of the issues, an initial analysis using the Leximancer textual analysis program generated the following diagram as shown in Figure 6.7.

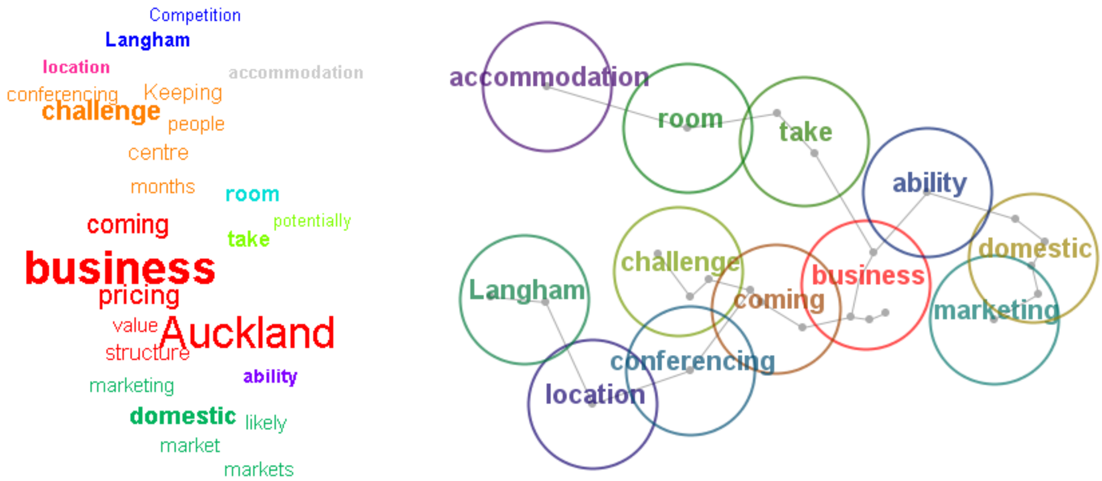


Figure 6.7 - Perceptual Maps from Leximancer identifying challenges

As might be thought, the responses to the question, ‘What do you think will be the major challenges for this business over the next 5 years?’ elicited a wide range of answers to the point where it is difficult to discern any dominant theme. The ‘cloud’ analysis on the left of Figure 6.7 highlights issues relating to pricing and keeping the business coming to Auckland, and associated with this the issues of maintaining quality, not discounting and the likely structure of Auckland. Comments that serve to illustrate these concerns include:

> Keeping business coming in. We have had the luxury of being the new venue for a while but now yet another an existing venue.

> Keeping existing clientele – assuring them that upgrade will happen. And competition – next door has just had an upgrade.

> Making sure shows hold together and they know we are willing to help. We can relax terms and conditions and negotiate on rental.

> It is hard to get international business. May have to focus on domestic markets. There is a limited ability to take large conventions due to capacity. We would be supportive of the construction of a National Convention Centre in Auckland.

A number of respondents commented on the development of competition, and the right hand side of the perceptual map picks up the specific mention of the Langham hotel. Here the respondent stated:

> Langham will have their new ballroom and will be offering a very good product

Another said

> Competition particularly from the Langham with their new ballroom and from Australian venues.

And a third stated:

> Increasing competition – specifically the Langham & Rydges

Other examples of reference to new competition included the following observations:

> There are threats from new business. The netball centre has conferencing. Ludlow bible college also has conferencing facilities. They changed their name to attract more conferencing business. We have heard that another hotel will be opening in the area.

In addition to these above aspects, a large number of minor issues can be identified. These included (a) an awareness of the need to be proactive over sustainable practices, (b) concerns over the situation either before or after the Rugby World Cup, (c) needs to recoup investment in refurbishment, and (d) the attractiveness of Auckland as a destination and its image in Australian eyes and the contribution a new conference centre might make. Taking these and other themes and assessing the specifics separately led to the following analysis.

6.2.6.1 Rugby World Cup 2011

Rugby World Cup 2011 was perceived by most venue respondents as being an opportunity for their business and the Auckland region in general. This was particularly true for the hotel venues, as they expect their occupancy rates to be very high during the event. Some venues had also been approached regarding hosting a team. In these cases their conferencing space will also be utilised. Most venues also agree that provided the event is a success it will raise the profile of the Auckland region, which is clearly a desirable outcome for the region. While overall the event is mostly seen as an opportunity, some venues expressed concern about the impact it would have on MICE business. One representative said "There won't be any space available for conferencing, and people will still need to conference, so they will go elsewhere." Another said "it will certainly be a time for budgeting wisely because there won't be as many meetings and seminars going on during those weeks". A second challenge identified by two venues is the possible shortage of resources during the event. One venue representative said "staffing might be an issue for us with the Rugby World Cup coming up".

6.2.6.2 Auckland Super-city

Overall the majority of venues believed the Auckland Super-city to be a good thing for the region and more specifically for their businesses. One of the main benefits hoped by the venues to arise from the change of governance structure, is that of addressing the current issue (discussed previously) of multiple bodies involved in tourism promotion and management.

A further opportunity that two venue representatives identified as possibly arising from the establishment of the super-city, is the increased need for conferencing particularly during the planning and establishment phases. They perceived that in the initial phases of establishing the super-city that meetings would need to be held between various council organisation as well as with the public in order to plan for and establish the new structure.

One venue representative also identified the possibility that a super-city could simplify the consent process for undertaking expansion and development at their venue.

6.2.6.3 International Convention Centre

Nine of the venues interviewed stated that Auckland needs a convention centre of international standard. This was thought to be by these venues, an opportunity that should not be wasted. One representative said “We need that kind of facility to attract those international conferences. People aren’t going to come from America or the UK to conference in a hotel.” Another venue representative said that “We need a convention centre to compete with overseas cities and bring people to Auckland”. The overall sentiment expressed by the venues who thought a convention centre is an opportunity is that it is needed in order to be able to compete with overseas destinations for MICE sector business.

6.2.6.4 Working Together as a Region

In addition to the super-city concept nine venue representatives also expressed a desire for the MICE sector in the region to work more closely together. One representative said “to attract international conferences you have to destination sell”, while another said “I think strategic alliances are going to be really important in the next few years, I mean aligning with people that support and compliment your products". A third person said "at the moment it is total chaos, too many people competing for the same slice of the pie, and we are lacking any kind of real direction". These nine respondents believed that by working together the product offering could be strengthened, which would ultimately lead to more business coming to the region.

6.2.6.5 Advances in Technology

A number of respondents view our ever advancing information and communication technology as a challenge that will need responding to over the coming five years. While one respondent confirmed that technology has not had the impact it was expected to five to ten years ago in terms of number of events and numbers of attendees, keeping up with technology will still be important over the next five years. Three other respondents also talked about the need to keep up with the rest of the world in terms of technology. They see this as important for attracting events to the Auckland region, but also for ensuring the experience satisfies delegates.

6.2.6.6 Getting People Spending Again

Getting organisations spending again and increasing rates was identified by four respondents as a challenge they will have to deal with over the next few years. As previously discussed, the economic climate has impacted on venues, both in terms of less being spent on events and in some cases the need to discount in order to attract business. As one venue representative put it "As a boss, you've shown me you can do it this way, then why go back to the way it was before? We need more drivers to get people spending." Another respondent said a major challenge for venues across Auckland was going to be increasing room rates. He feels that it is something that has to be done, but in the economic climate at the time it was seen as a challenge.

6.3 Suppliers

6.3.1 Inventory

Table 6.2 provides a breakdown of number of key suppliers in the region and the number of participants in this study. These suppliers are broken down into six categories, based on the supplier's core business activity. However, it should be noted that in some cases suppliers may operate in other areas, for example, a catering company can also perform the role of event manager.

Table 6.2 – Inventory of MICE Suppliers in the Auckland Region

Supplier type	Number in region	Number of participants
Audio/visual	3	1
Catering	7	3
Equipment hire	3	2
Event management	14	2
Labour hire	3	1
Coach Transport	4	2
Totals	34	11

An initial analysis was again undertaken by identifying themes by listening to the audio files and through the generation of categories of themes with the use of Atlas TI, and these results are reported first. Next the relationships between themes are reported as extracted from the CatPac and Leximancer files.

6.3.2 Contribution to revenue

In general, the suppliers who were interviewed in this study are highly dependent on the MICE sector. Audio/visual, equipment hire and event management providers draw at least 90% of their revenue from the sector. Catering companies and labour hire companies also service the special occasion market so tended to be less reliant, drawing approximately 60% of their revenue from the MICE sector. The transport providers interviewed were the least reliant on the MICE sector. Their core business is in transporting inbound tourist, however the MICE sector is becoming increasingly important to them.

6.3.3 Systems and Processes

6.3.3.1 Feedback Systems

As was expected methods of obtaining, initiating and monitoring feedback, varied greatly amongst the suppliers interviewed. Event management companies had the most comprehensive processes in place. These processes involved the use of questionnaires, informal feedback, and telephone and in person debriefs with clients. Feedback was routinely collected from both clients and event attendees and stored in a database for monitoring.

All the other suppliers interviewed had processes in place to obtain feedback from their clients. These varied from a debrief conducted in person for large events, over the phone for smaller events, in the case of the audio visual company to simply staying in regular contact with clients for two of the smaller participating organisations.

The transport providers also utilised their presence at the event as a means of obtaining feedback from delegates. While this feedback was informal, and mostly collected by the drivers, they feel this provides them with a wealth of information they can use to improve and maintain service standards.

6.3.3.2 Human Resource Management Practices

Human resource management for suppliers appears to be generally more informal than is the case for the venues in this study. With the exception of the audio visual company, none of the participating suppliers have dedicated HR personnel. It should be noted, however that the audio visual supplier is the only multinational company who participated in the study.

Training is seen as important by four of the suppliers interviewed. They all have in place comprehensive training programmes for front line employees. In addition to these suppliers with formal training programmes another three suppliers recognise the importance of on the job training. They felt that they make a significant investment in this area when bringing on board a new employee, and as a result work hard to keep employees. Keeping staff turnover low is seen as important for the efficient working of the team.

6.3.3.3 Marketing Practices

Word of mouth, repeat clientele and referrals (particularly from venues) are by far the most commonly reported sources of business for the suppliers participating in this study. The audio visual company, both of the equipment hire companies, the labour hire firm and two of the catering companies see the relationships they have with venues as a key source of business. The transport companies also believed referrals were a key source of business, however they receive most of their referrals from PCO's, ITO's specialising in incentive travel and through their membership of BTA. All of the suppliers interviewed noted they have a high proportion of repeat clientele.

In comparison to venues, suppliers spent very little on promotion and advertising. All of the suppliers interviewed have their own website and are listed on at least one directory site such as BTA or CINZ. All but one supplier has a listing in the *Yellow Pages*. Other advertising is very limited with one caterer mentioning having done features in the food section of the *Herald on Sunday* in the past, and one transport company and one of the event management companies occasionally advertising in *Meeting News*, although both did not believe that this was particularly successful.

6.3.3.4 Environmental Initiatives

The presence of specific environmentally friendly practices and initiatives is divided amongst suppliers. Of the suppliers interviewed six have a very strong focus on the environment. While only two of these suppliers have green globe certification, the other five have in place a range of strategies to reduce their negative environmental impact. These range from ensuring recycling takes place, to specific strategies to reduce power and paper consumption, to encouraging actively encouraging clients to choose greener options.

The other five suppliers who participated in the study don't have the same degree of focus on the environment but do try to minimise their environmental impact. All engage in recycling to some degree. All also said they would do more if ideas were presented to them that were practical and financially feasible.

6.3.4 Current Concerns and Issues

6.3.4.1 Economic Climate

As is the case for venues, all suppliers have experienced impacts due to the global financial crisis and subsequent economic climate. All suppliers interviewed noted that fewer events were being held and that in general events tended to be smaller in terms of number of attendees.

Equipment hire and audio/visual suppliers noted that event organisers seemed to be choosing cheaper options for example one supplier noted "People are still going to the shows but they're not spending as much on their stands, or they're bringing their own stuff in." Another interviewee said "Everyone is just so focussed on the bottom line. They don't even look at what you're offering. They just flick straight to the page of the proposal with the price".

Other impacts reported including a shortening of lead times for events, and people leaving attendance decisions until the last minute. One event management supplier also noted that sponsorship was more difficult to obtain for events.

Utilising the software programs other than Atlas TI brought to the fore a concern with costs. For example respondent 2 stated:

> A problem in industry is that the focus is very much on the bottom line i.e. cost rather than concepts presented.

While other respondents referred to increases in costs.

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
YEAR	7	6.4	22	20.8
COSTS	6	5.5	24	22.6
REALLY	6	5.5	22	20.8
BIG	5	4.6	18	17.0
BUSINESS	5	4.6	17	16.0
CLIENTS	5	4.6	20	18.9
DONT	5	4.6	20	18.9
GOING	5	4.6	17	16.0
LAST	5	4.6	18	17.0
PEOPLE	5	4.6	16	15.1
T	5	4.6	18	17.0
ECONOMY	4	3.7	16	15.1
NEED	4	3.7	14	13.2
WILL	4	3.7	15	14.2
ENOUGH	3	2.8	12	11.3
GETTING	3	2.8	12	11.3
INDUSTRY	3	2.8	12	11.3
QUIET	3	2.8	8	7.5
TRYING	3	2.8	12	11.3
VENUES	3	2.8	9	8.5
ALIGNING	2	1.8	6	5.7
ASSOCIATION	2	1.8	8	7.5
AUCKLAND	2	1.8	8	7.5
BUDGET	2	1.8	8	7.5
CBD	2	1.8	6	5.7
CENTRE	2	1.8	8	7.5
CITY	2	1.8	8	7.5
CONFERENCES	2	1.8	7	6.6
CONVENTION	2	1.8	8	7.5
COUNCIL	2	1.8	7	6.6

Figure 6.8 - Frequency Word Usage for Concerns of Suppliers

Looking at the dendogram (Figure 6.9) generated by the same software on the left hand side of the diagram one sees concerns about aligning budgets and whether the size of the city is really large enough to support a major conference centre. The centre of the dendogram additionally refers to the quiet state of the economy in the period after 2008 while the right hand side of the dendogram relates the words ‘cost’ to those of ‘council’. In this respect respondent 7 referred to changes in personnel in the council and increasing costs while respondent 1 mentioned increased costs due to congestion in the city.

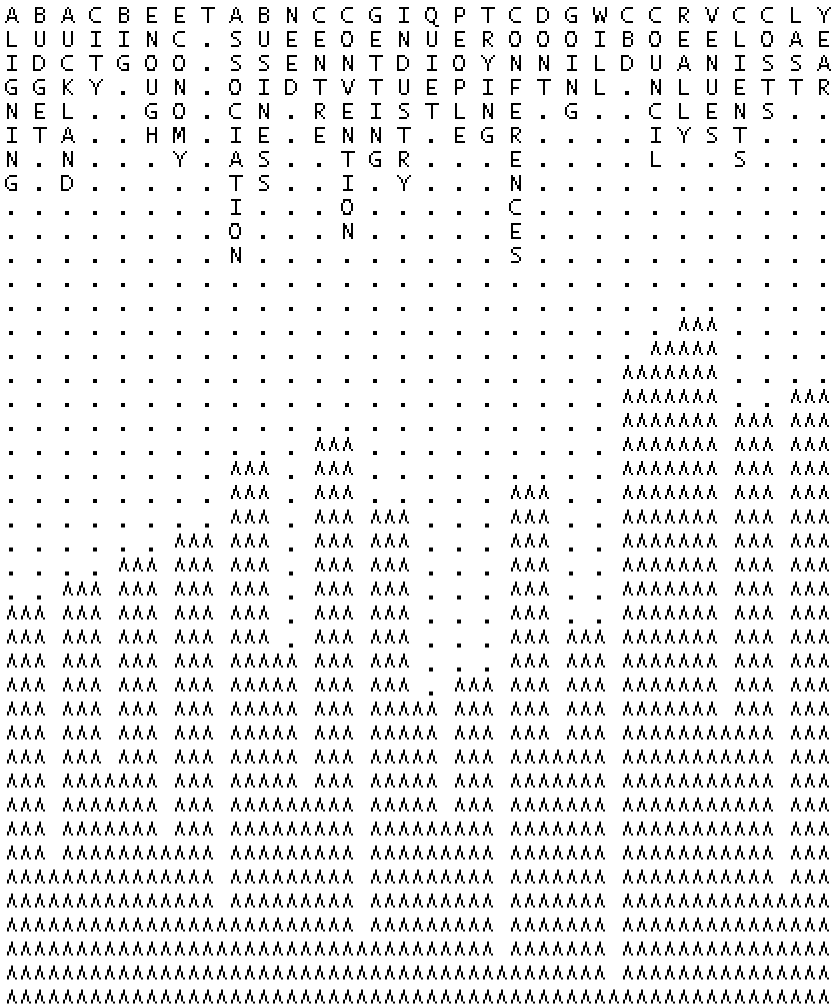


Figure 6.9 - Dendogram for Supplier Concerns

Utilising the software, Leximancer, to generate perceptual maps, a confirmation of the analysis arising from CatPac resulted as shown in Figure 6.10

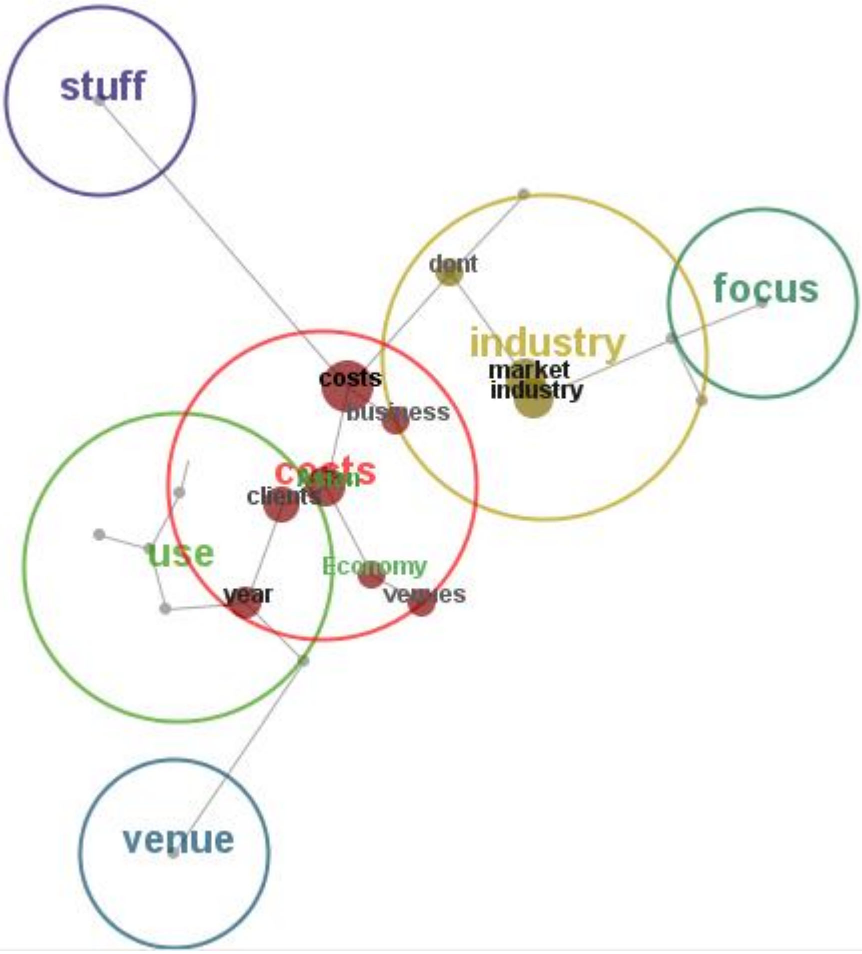


Figure 6.10 - Perceptual Map for Supplier Concerns

This clearly shows the centrality of costs – but more clearly links costs to economic conditions and the quiet state of the industry which did not help in attempting to either control or pass on costs. The word 'stuff' was used in two connections – first respondent 7 reported 'Still going but cutting costs – utilising own stuff' while respondent 11 commented that the region was finally getting 'its stuff together'. Both interpretations reflect on the cost issues facing the industry.

6.3.4.2 Coordination of and Support from Government

Two interviewees raised an issue of what they perceived as a lack of understanding and support from various government agencies, including city councils and the police.
A transport company representative gave an example where delegates were being transported to a black tie dinner at a CBD location. This particular venue does not have any designated coach parking, so the coaches pulled up on the road side to drop off delegates. The police arrived and said they could not stop there and needed to drop passengers off at the bus stop 50 metres down on the opposite side of the road. This resulted in several hundred delegates in formal attire needing to cross the road in the dark, which in the interviewee's opinion not only inconvenienced the delegates but also put their safety at risk.

An equipment provider representative explained that mid 2009 saw a change in personnel at ACC, and that has resulted in a change in policy regarding permits for stands at exhibitions. Individual stands now require a permit, and are required to pay a $150 fee when applying. This is despite stands being constructed to internationally recognised standards. This is seen by the interviewee as an unnecessary complication and increase in cost to exhibitors.

6.3.4.3 Staffing Concerns

Sourcing and then keeping staff with appropriate training and level of skills is an issue that was raised by two catering companies and the labour hire company. These suppliers felt that their inability to guarantee hours each week, along with the low rates of pay they could offer were at least part of the cause of this problem. Another issue raised by one interviewee was that many of the casual employees were international students, whose student visa only allowed them to work a maximum of 20 hours per week. It was felt that by allowing this to be worked out as an average maximum over a period of time, it would allow greater flexibility in these workforces.

6.3.5 Opportunities and Challenges for the Coming Five Years

This question tended to be dominated by deficiencies in resources, notably whether there were sufficient right staff, finances and technologies. On the other hand there were concerns about more strategic elements, one of which was the market. Here there were questions about either the size of the New Zealand or Auckland market, while on the other side there was the issue of whether New Zealand's geographic position was a possible hindrance. Examples of such statements included:

Respondent 4:

Finding right staff and keeping them

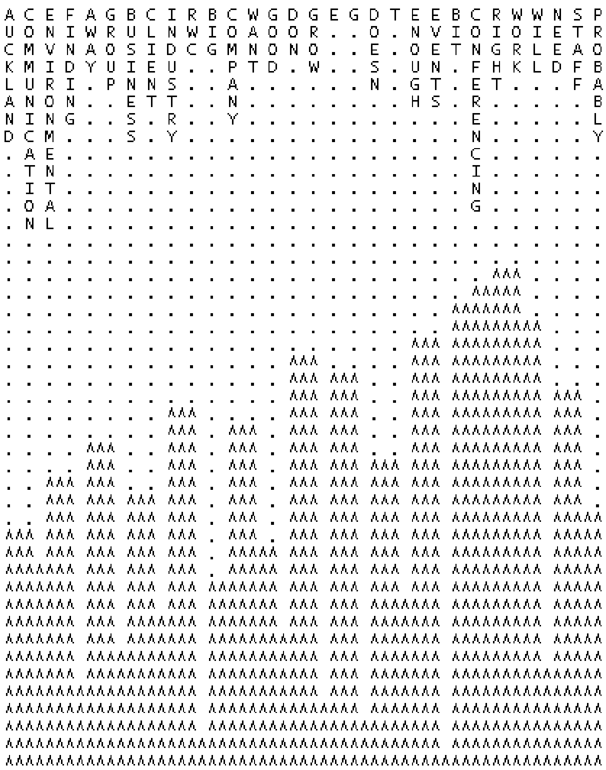


Figure 6.11 - Challenges over the Next Five Year - CatPac Results

Respondent 2

Rugby World Cup – there is not enough equipment and technical expertise. Many in industry need more work experience. There are also technological constraints including broadband infrastructure. More long term, Auckland not good at promoting itself as a MICE destination.

These issues can be identified in the dendogram generated by CatPac. Thus on the right hand side can be words associated with staffing while on the left can be found a cluster of words associated with issues surrounding Auckland.

Of interest is that for this question the Leximancer software tended to pick up a slightly different emphasis as shown in Figure 6.12. Looking at the word chart associated with 'events' the theme seems to be a questioning of to what extent events existed, although the text is partly biased here by references to the Rugby World Cup of 2011. Again, however, issues of staff and professionalism within the industry, and its resources are caught within the perceptual map.

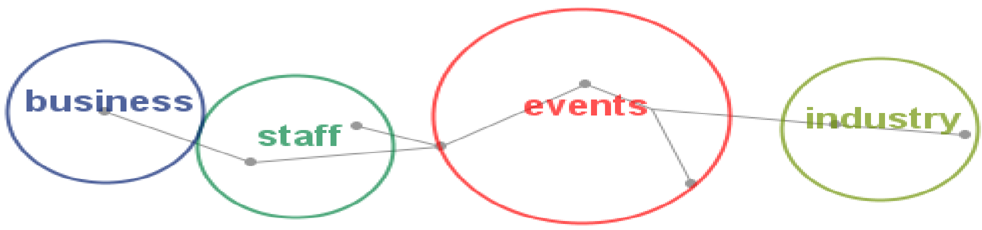


Figure 6.12 - Perceptual Map of Suppliers Perceived Challenges

In addition to the challenges that have been identified through the supplier interviews, a number of opportunities for the sector have also been identified. These opportunities are all, with the exception of RWC 2011, related to current weaknesses that have been identified. The supply side of the sector identified these weaknesses as ones that if addressed provide opportunities to improve the function of the sector. These are identified in the thematic analysis derived from the use of the CatPac and Leximancer programs.

As might be thought, responses to the question ‘Can you identify any significant opportunities for this business to capitalise on in the next 5 years?’ were dominated by three main current issues, which were the forthcoming Rugby World Cup, the Convention Centre (with some respondents questioning its necessity) and the possible synergies to be created from the ‘Supercity’ and the reorganised local government of Auckland. Thus comments included:

> Respondent 1
>
> RWC - a huge opportunity for tourism. It is a huge opportunity for NZ to show we can host big events. The infrastructure and facilities have to be finished in time.
>
> Respondent 3
>
> Um - New convention centre?
>
> Respondent 10
>
> Direct flights to Rotorua has a negative impact on our business. And possibly need a convention centre - not convinced …. and the incentive market as yet untapped.

Arising from these issues others then emerged, of which the need for collaboration by various parties was a not uncommon theme.

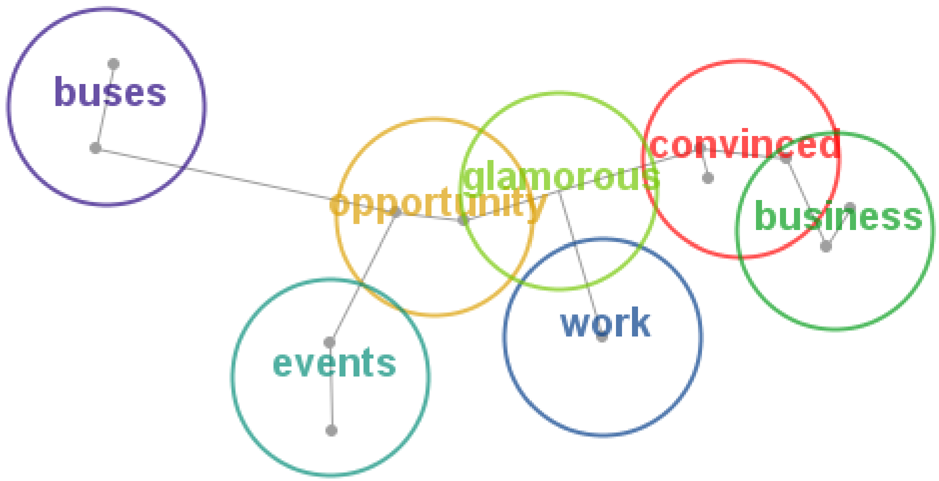


Figure 6.13 - Perceptual Map of Opportunities

As in the previous question of challenges it was found that Leximancer picks up an additional idiosyncratic comment about concerns relating to public transport and buses, but otherwise there are similarities in the analysis derive from CatPac and Atlas TI. The Rugby World Cup is a glamorous event, a great opportunity (while there also other opportunities in events) but it requires work. The word 'convinced' relates to the conference centre while as shown in Figure 6.13 the word 'business' is quite common. Thus comments included:

> Separate business units don't work well together. For example ACC, BTA and CINZ should be working together. Auckland and Wellington chalk and cheese in this regard. Supercity will help.

> Smart business will have the resources to cope.

There is general business growth.

But again the word ‘business’ is associated with previously identified themes of collaboration needs and resources needs and management.

While managing the logistics associated with RWC 2011 has been identified as a challenge for the sector, the event is undoubtedly viewed as presenting opportunities for the region. The event offers the opportunity to increase awareness of and the profile of the region, through visitation and media coverage. RWC 2011 also provides an opportunity to demonstrate the region’s capability to host large events: a capability that is essential to attract large MICE events.

However, the Atlas TI analysis did identify some differences in themes between the different categories of suppliers, and these are identified below.

6.3.5.1 Advances in Information and Communication Technology (ICT)

Four of the suppliers interviewed made reference to the constant advances in ICT and the impact this is likely to have on the MICE sector in the coming five years. These suppliers were the two event managers; an audio/visual company; and an equipment hire company. The event managers interviewed both see technology as impacting on how events are run more so than the number of events. One event manager thought the uptake of new technology was occurring slower than expected and actively worked to encourage it use: “We have the capacity to run a completely paperless conference, but our clients, especially the medical conferences, still want everything printed. We try to encourage them to do stuff electronically.

We charge less for an online registration than a paper based one". The other event manager was more concerned about how to ensure that face-to-face events continue to provide value to delegates as we move to a more virtual world.

The audio/visual and equipment hire company representatives both observed that trends such as the increase in video conferencing, the ability to broadcast conferences to multiple sites and the emergence of online exhibitions occurring overseas. They see these trends as likely to be replicated in New Zealand in the future, which could serve to erode part of their business.

6.3.5.2 Diversification of Business

Following on from these advances in ICT the equipment hire audio visual representatives see diversifying their product/service offering as a key opportunity to capitalise on over the coming years. They hope by offering products and services in areas such as online exhibitions and video conferencing they can counteract any decline in business in their more traditional business.

The labour hire company interviewee also saw an opportunity to diversify the business. As previously discussed, they perceive there is lack of trained and skilled employees. They see an opportunity to fill this gap by diversifying their product offering to include more training.

6.3.5.3 Rugby World Cup 2011

The suppliers interviewed were divided in opinion regarding whether the Rugby World Cup is a challenge or an opportunity for their business. Four suppliers believe that it is will provide an opportunity for their business and they expect to gain additional business as a direct result of the RWC2011. However, a further four suppliers are concerned about the challenges RWC2011 will present for their businesses, the region and New Zealand as a whole. Of concern to three of these suppliers is amount of resources that will be required and whether there are sufficient resources available. These resources include not only physical resources such as transport, but also human resources in terms of staffing. A further concern for one supplier is that regular conferencing will not be able to occur in the region during the RWC2011 period and therefore it will probably be lost to another destination. Another supplier said “Rugby World Cup just brings idiots to the game. All these companies just get established for one event. Then after they go bust and that reflects badly on the rest of us.”

6.3.5.4 Competing With Other Destinations

Five of the suppliers interviewed identified competition in some form as being a challenge for their business in the coming 5 years. Of these suppliers, four identified that Auckland competing with other destinations, both within and outside of New Zealand was a major challenge. These suppliers feel that for Auckland to be a competitive destination, the region needs to be working more closely together and there needs to be an improvement in the infrastructure available to support the sector.

6.3.5.5 International Convention Centre

The suppliers interviewed definitely perceive there is a need for an international standard convention centre in the region. One of the event managers interviewed reported having to take events to Australia as there is not a venue big enough in New Zealand. This sentiment was echoed by the other event manager, both equipment suppliers and two of the catering companies. They feel that the large events are going elsewhere because there isn’t a venue large enough to host them.

6.4 Sector Relationships and Communication Channels

The majority of relationships venues had with other organisations were in the form of preferred supplier agreements. These preferred supplier agreements covered a range of services including audio visual services, equipment hire, catering, transport provision and offsite accommodation for venues not having accommodation on site. In most cases the venue had only one preferred supplier for each type of service. There are however, instances where venues have in place multiple preferred supplier agreements. One example of this is a CBD venue that has four preferred catering suppliers, and another is a large suburban venue that has in place multiple preferred accommodation supplier agreements. In this case it is to provide clients with options as to where they want to stay and a choice of what standard of accommodation.

There are a few instances of venues having in place exclusive contracts with suppliers. Two venues, both large, but one suburban and one CBD based have an exclusive contract with a catering company. A further example of an exclusive contract is a CBD hotel that provides a taxi rank out the front of the hotel for exclusive use by just one taxi company.

In addition to supply agreements, linkages can be found across the sector through memberships of industry bodies. Most hotel venues are members of the Hotel Council Business Tourism Auckland and have CINZ membership, while many meet through the industry forums and conferences that were organised in the past by Tourism Auckland and other bodies. Several of the participants knew at least one of the other participants quite well. Some had worked together in the past and some knew each other through attendance at various tradeshows and networking functions. One respondent stated “We all know each other and we talk". A few others made similar comments, indicating there are some informal networks in place in the sector.

6.5 Situational Analysis

As highlighted in the introduction to this chapter this section draws the findings of both interviews together to form a preliminary set of SWOT factors. The current strengths and weaknesses are identified first, followed by future opportunities and challenges (threats).

6.5.1 Strengths and Weaknesses

The strengths of the region that were identified as a result of the venue and supplier interviews fall into three main groups: 1) attributes of the region as a whole; 2) systems and processes in place within supply side organisations; and 3) marketing presence of supply organisations. These strengths are summarised below in table 6.3.

Table 6.3 – Strengths of Auckland as MICE destination identified after supply side interviews

Attributes of the region	**Systems and processes**	**Marketing Presence**
Range of venues and associated facilities and services	Client feedback systems	Number of supply organisations exhibiting at trade shows
Availability of transport to Auckland	Human resource management practices	Number of supply organisations with internet presence
Diverse environments	Environmentally friendly practices and initiatives	
Range of activities		

The first attribute of the region as a whole that is perceived as a strength is the availability of a range of types of venues and supporting facilities and services, such as accommodation, catering and equipment suppliers. This is considered a strength as it provides the consumer with choices that allow them to meet individual requirements.

The second attribute of the region that is considered to be a strength is the availability of transport to the region. The Auckland airport provides direct flights to many New Zealand locations as well as direct flights to many flights locations in Asia and America and has connecting flights to most major airports around the globe. As discussed earlier in chapter three, ease of access is considered by event organisers as an important selection criteria (Chen, 2006; Hankinson, 2005; M. Oppermann, 1996; Ryan et al., 2007; Toh et al., 2007).

The third attribute that was identified as a strength of the region is the diverse range of environments that can be found within the region. As highlighted in chapter two of this thesis, the Auckland region includes much more than just the central business district. With two coastlines, an abundance of regional parks, gulf islands and rural areas, the region offers a variety of natural environments. This is seen as a positive asset because the region cannot only offer the facilities and services of large city, but can provide these in unique environments, thus providing selling point for the region.

The fourth positive attribute of the region as a whole that was identified is closely related to the range of environments offered within the region, and is the range of activities and attractions that can be found in the region. The Tourism Auckland publication '*Mild to Wild'* was identified as a great start to providing information to visitors on the range of activities that can be undertaken in the region.

In the second group of strengths, the first is the feedback systems that are in place at all venues and suppliers who took part in this study. While the processes used to collect, monitor and action feedback varies greatly between supply organisations, all organisations routinely collect feedback from clients. They use this feedback to monitor and improve service standards. This is a strength, as it means that supply organisations are constantly striving to deliver an excellent product.

The second strength of the sector is the presence of sound human resource management practices, and in particular the focus of many organisations on employee development and retention. A well trained, stable and motivated workforce assists the sector to deliver exceptional service.

The third strength identified from these supply side interviews is the focus that most organisations have on being environmentally responsible. As previously discussed in chapter four, New Zealand and the Auckland region, uses a ‘clean and green’ image to attract international visitors. Accordingly it is important that organisations deliver on this promise. The organisations interviewed in this study are clearly striving to deliver on this promise.

The third aspect where the region displays strengths is in the area of marketing presence. Many of the supply organisations interviewed exhibit at MICE specific tradeshows such as Meetings and Convene. Given the importance of these types of shows in attracting MICE business to the region, having a solid presence at these events is important for the region. In addition to having a solid presence at tradeshows, the sector also has a solid web presence. Given the trend towards researching and booking online, as discussed in chapter three, the sector needs to be ensuring that their web presence is appealing and easy to locate. In this respect overall the sector is performing well.

As can be seen in table 5.4, the weaknesses of the region as a MICE destination identified as a result of the supply side interviews can also be divided into three groups. These groups are significantly different to those of the strengths identified as they are much more about aspects of the destination which are not in the locus of control of individual organisations. The three groups are related to the infrastructure that exists within the region to service and support MICE activity, the way in which Auckland as region is marketed and perceived, and the communication, coordination and collaboration between industry stakeholders including local and regional governments.

Table 6.4 - Weaknesses of Auckland as MICE destination identified after supply side interviews

Infrastructure	**Perception & marketing**	**Communication, collaboration & coordination**
No international standard convention centre	Perception that NZ is too far away	Lack of coordination & support at local/regional government levels
Lack of accommodation on-site/adjacent to many large venues	Perception of Auckland by New Zealanders outside the region	Lack of collaboration between stakeholders
No means for recycling food scraps	Lack of a unified compelling regional marketing message	Limited systems for sharing relevant feedback with other supply organisations
Lack of supporting infrastructure e.g. public transport, cruise ship terminal		

The first weakness identified in the infrastructure category was the fact that at this time Auckland does not have a dedicated international standard convention centre. This is considered a weakness as it restricts the size, type and number of events that can be hosted in the region. Closely related to this weakness is the lack of accommodation on site or adjacent to many of the larger venues in the region. While these larger venues can service larger events, the lack of accommodation has an impact on their appeal to event organisers, as availability of accommodation for delegates has been identified as an important factor in site selection by event organisers (Crouch & Louviere, 2004).

While not considered a major weakness, there is currently no means for recycling for food scraps. As with most industry segments that involve hospitality, food scraps are a large source of waste for organisations (Waikato Regional Council, 2011).

The final infrastructure weakness identified from the supply side interviews is in regard to supporting infrastructure. Several interviewees pointed to the unreliability of public transport, especially to the CBD area, the shortage of parking, congestion on the motor ways and the lack of proper cruise ship terminal as weaknesses of the region.

Under the perception and marketing category, interviewees highlighted the two completely separate weaknesses in the way in Auckland is perceived by the market. Firstly in relation to the long haul international market, many interviewees felt that overseas based meeting planners, particularly those in Europe and USA, perceived New Zealand to be too far away to be a competitive MICE destination. Secondly, in relation to the domestic and parts of the trans-Tasman market, the perception of Auckland is not favourable. The reasons given by interviewees for this less than positive perception were related to the two factors: the perceived lack of attractions and activities in the region and issues with traffic and congestion.

Also falling in the perception and marketing category as a weakness of the region is the lack of a unified and compelling marketing message. A number of interviewees pointed to the numerous bodies involved in promoting the region, including the various city and district councils that existed at the time when the interviews took place, Tourism Auckland and the Heart of the City group. They felt that this myriad of messages was confusing enough for industry stakeholders, let alone markets receiving these messages. In addition it was identified through the interview process that the improvements were required to the marketing proposition offered, particularly at trade shows. In the context of MICE specific promotion the region requires a unique selling point and creative displays to capture attention.

Closely related to the issues of multiple marketing messages is the weakness of lack of coordination and support and local/regional government level. Two of the suppliers interviewed were able to give specific examples of this weakness. In both cases the interviewees attributed this weakness to two factors: the number of bodies involved and a lack of understanding of the sector and its importance to the region.

Also falling into the communication, coordination and collaboration category is the overall lack of collaboration between stakeholders in order to win bids and bring business to the region. Certainly, BTA facilitates collaboration and provides coordination through their bidding processes, however, outside of BTA very little collaboration occurs. This is clearly evident through the price wars that a number of venue interviewees highlighted.

The final weakness identified as a result of the supply side interview process is the limited sharing of relevant feedback between organisations. There is in place processes for sharing of feedback between various suppliers, including venues, related to a specific event. What is lacking is more general feedback sharing in regard to the region as a whole. An example is where an event included an activity that delegates really enjoyed; the sharing of this information with other organisations could allow them to strengthen their future bids by including these kinds of activities in their proposals.

These weaknesses in terms of communication, coordination and collaboration are perhaps the most significant weaknesses identified during the supply side sector. As was discussed in

Chapter 3 of this thesis, these elements are crucial to the effective functioning of networks (Dredge, 2006a, 2006b; Guiseppe, 2008). The with MICE sector by necessity being a networked sector, this represents a significant area of weakness for the Auckland MICE sector.

6.5.2 Opportunities and Challenges

Opportunities and challenges as identified by venue representatives and by supplier representatives have been highlighted for each group earlier in this chapter. This part of the chapter merges both sets of findings to compile a list of challenges and opportunities identified from interviews with the supply side of the sector.

Table 6.5 – Challenges and Opportunities identified from supply side interviews

Challenges	*Opportunities*
Coping with the economic climate	Working together to promote the region
Adjusting to shorter lead times	Improved coordination following the introduction of the Auckland Super City
Coping with increased competition from other destinations	Construction of an international standard convention centre
Keeping up with advances in information and communication technology	Capitalising on clean green image of New Zealand
Ensuring on-going commitment to environmental initiatives	Capitalising on natural assets of the region
Managing the logistics of hosting Rugby World Cup 2011	Capitalising on Rugby World Cup 2011 as a means to showcase the region and show that the region can host large events
Overcoming negative perceptions of Auckland by other New Zealanders	Targeting specific industries

As can be seen from table 6.5, all but two of the challenges identified from the supply side interviews were previously identified as issues and trends for the sector in chapter three of this thesis. These include advances in information and communication technology, the economic climate, increasing competition and the focus on environmental issues. As such, it is not necessary to discuss these challenges again at this stage. On the other hand, the challenge of managing the logistics of hosting Rugby World Cup 2011 was not identified in the literature review process of this research, and as such warrants further discussion as to why this was considered a challenge for the MICE sector in the region.

Major events, such as Rugby World Cup 2011 (RWC2011), by their very nature, pose significant logistical challenges for event organisers, including logistics associated with transport, food and beverage provision, waste management and security to name just a few (Getz, 1997). In the case of RWC2011, the scheduling off the event over an extended period of a little over six weeks (International Rugby Board, 2010) provided an additional challenge of hosting teams, including players and support staff, a significant media contingent and visitors, both international and domestic, coming for the purposes of watching games for the duration of the event. Herein lays the challenge for the MICE sector in the region, with many of the venues and associated suppliers being utilised for RWC2011 purposes. This essentially means that very little MICE activity occured in the region during this time period. As one interviewee stated “People will still need to meet, they will just do it somewhere else. The challenge might be getting them to come back again afterwards”. Additional concern was also expressed that the region might not have the physical resources to cope with the number of extra people that were expected to be in the region. If this had proved to be the case it could have been quite catastrophic for the sector, as it would have severely damage the reputation of the region as an event destination.

Like the challenge of hosting RWC2011, the issue of how Auckland is perceived by other New Zealanders, was not identified during the literature review process. As previously highlighted, the way in which Auckland is perceived has been identified as a weakness of the region. That said, the supply side of the sector see this as an area which can and should be addressed, and therefore is viewed as a challenge for the sector.

6.6 Conclusion

This chapter has presented the findings that were obtained from interviews conducted with representatives of 41 supply side organisations for the MICE sector in the Auckland region. Through analysis of these interview recordings a preliminary situational analysis has been compiled.

The sector has a number of strengths, which originate from the diverse nature of the Auckland region, and from the practices and processes in use within the supplier organisations that participated in this study. On the other hand there are also a number of areas that can be improved, particularly related to marketing of the region as a MICE destination, and coordination and communication between various stakeholders. Interviewees recognised these areas of weaknesses and gave these as responses when questioned regarding future opportunities and challenges for the region's MICE sector.

The following chapter presents findings from the demand side; the consumers of Auckland's MICE product. In the final section of the next chapter the situational analysis is reviewed in light of the additional findings. These combined findings are then used as the basis of the Delphi panel questionnaire discussed in chapter eight of this thesis.

Chapter 7 – Current Position – The Demand Side Findings

7.1 Introduction

This chapter presents the findings from the questionnaires that were collected from consumers of the MICE product in the Auckland region. These data were collected during the period of July 2009 to March 2010. Questionnaires were developed and distributed to three populations: Delegates, exhibitors and event organisers. These questionnaires were then analysed in line with the framework presented in Table 5.1. Copies of each of the questionnaires can be found in the appendices to this thesis.

This chapter follows the same structure as the previous one whereby the findings from each population are presented individually, beginning with the delegate population. The exhibitor findings are discussed next, followed by the findings from event organisers. The final section of this chapter adds to the preliminary situational analysis present in the previous chapter, by identifying additional strengths and weaknesses, along with opportunities and challenges. This combined set of factors is then used to form the questionnaire for the Delphi process outlined in the next chapter.

7.2 Delegates

7.2.1 Sample Size and Response Rate

Delegates were surveyed a total of eight events during the period of July 2009 and March 2010. These events included five association conferences, a corporate training event, an incentive awards dinner and a public exhibition.

In the case of the training session, it was expected that there would be 12 delegates attending but it eventuated that there were only seven on the day. The questionnaires were delivered to the training session and the trainer distributed them to the delegates. This event had a good response rate with five of the seven attendees returning the questionnaire.

For the public show the researcher attended this event in person and distributed a total of 100 questionnaires to event attendees. Attendees were approached either as they were leaving the show or while seated in the small café adjacent to the exit. This approach achieved a response rate of 11% which was rather disappointing.

In the case of the incentive gathering, the event organiser emailed approximately 100 of the attendees three days after the event. The email had a link to the web version of the delegate questionnaire. This approach yielded 10 completed questionnaires, a response rate of approximately 10%.

This approach was also used for one of the conferences, however with much less success. In this case only 4 completed the questionnaire out of 118 delegates that were emailed. A similar approach was used for the first conference that delegates were surveyed at, however this time they were emailed a word copy of the questionnaire as an attachment. They were also advised of how they could return the questionnaire by post or email. This was more successful with 11 useable responses from a total of 110 delegates. The best response rate was achieved for an association conference where the questionnaires were included in the delegate packs and locked box was provided for return. This approach resulted in 27 of the 143 delegates completing the questionnaire; a response rate of 18.9%.

The total number of questionnaire distributed at the eight events was 963. The overall response rate for the delegate questionnaires was 10.8%.

7.2.2 Demographic Profile

A total of 104 useable responses were collected from delegates during the data collection period. Of these respondents there were equal numbers of males and females. The age of respondents varied between age ranges of 25-34 years and 65+ years, with 60% of respondents aged between 45 and 64 years. This profile fits with the study conducted by Fjelstul, Severt & Breiter (2009) who found that those of the baby boomers generation and generation x members account for a great proportion of attendees at American association events.

Table 7.1 – Demographic profile of delegates

Demographics	Frequency	Percent	Demographics	Frequency	Percent
Gender			**Occupation**		
Female	51	50.00	Sales, Marketing, CRM	7	6.93
Male	51	50.00	Senior/Exec Management	14	13.86
Missing	2		Academic	8	7.92
Age (years)			Finance/Accounting	1	0.99
25-34	10	9.80	Primary Producer	1	0.99
35-44	25	24.51	Public Sector	9	8.91
45-54	31	30.39	Medical Professional	34	33.66
55-64	31	30.39	Unskilled services	1	0.99
65+	5	4.90	IT	1	0.99
Missing	2		Home duties	4	3.96
Place of Residence			Student	1	0.99
Auckland	36	35.29	Teacher	11	10.89
North Island	28	27.45	Retired	3	2.97
South Island	4	3.92	Administration	3	2.97
Australia	28	27.45	Religious leader / clergy	2	1.98
Other international	6	5.88	Consultant	1	0.99
Missing	2		Missing	3	

Approximately 35% of respondents were local Auckland residents. A further 27% were visitors from within the North Island and the same number were visitors from Australia. Only 4% were visitors from the South Island of New Zealand and 6% were visitors from other international locations. This profile of the origin of respondents is similar to what was expected. The Convention Delegate Survey findings show that domestic visitors account for the largest proportion of delegates attending events in New Zealand (50%), followed by local residents (40%) and then international visitors (10%) (Covec, 2010a). Given that one of the events participating in this study was an Australian association it was expected that the profile would show a higher proportion of delegates from Australia that the Convention Delegate Survey.

Occupations of respondents varied greatly; however, significant proportions were medical professionals (34%), senior or executive managers (14%) or teachers (11%). This also was not a surprise, given the nature of the events from which the delegate sample was drawn.

7.2.3 Travel Behaviour

Examining the travel behaviour of delegates attending MICE events in the region is important for understanding the needs of these delegates, which ultimately will assist with development of a desirable product offering and targeting of marketing activity. Of the 69 respondents who travelled to an event from outside the Auckland region a little under half (48%) arrived via international flight, indicating all but one of the international respondents arrived in New Zealand via Auckland International Airport. Domestic flight was the next most common mode of transport to the region at 26%, while 20% travelled to the region in a private vehicle. With the majority of delegates travelling from outside the region arriving via air, ensuring that suitable transport is available from the airport to event venues is an important consideration for the MICE sector.

Table 7.2 – Travel behaviour of delegates

Travel mode	Count	Percent	Mode of Booking Travel	Count	Percent
International Flight	33	47.83	Conference Organiser	7	10.14
Domestic Flight	18	26.09	Travel Agent	11	15.94
Rental vehicle	2	2.90	Directly	8	11.59
Private car	14	20.29	Internet	25	36.23
Other	2	2.90	Other	4	5.80
Missing	0	0	In house travel coordinator	3	4.35
			Missing	11	15.94

The most frequently reported method of booking travel was via the internet (36%), followed by through a travel agent (16%) and directly with the transport provider (12%). Only 10% of travel bookings were made through the event organiser.

Table 7.3 – Accommodation profile of delegates

Accommodation	Count	Percent	Mode of booking	Count	Percent
Home of friends or relatives	6	8.70	Conference organiser	21	30.43
Hotel	44	63.77	Travel agent	4	5.80
Motel	7	10.14	Directly	10	14.49
Serviced apartment	6	8.70	Internet	19	27.54
Other	3	4.35	Other	2	2.90
Day trip	3	4.35	In house travel coordinator	4	5.80
Missing	0	0	Missing	9	13.04

The majority of visitors to the region stayed in a hotel (64%) while in Auckland, with a further 19% staying in a motel (10%) or serviced apartment (9%). Only 3 respondents reported making a day trip to attend the event. Most hotels, motels and serviced apartments stayed in by delegates were at either deluxe (46%) or luxury (19%) standard. These figures are also not surprising given that the majority of venues identified in this study were hotels of this classification, and five of the other participating venues had supply arrangements with deluxe standard hotels.

In contrast to travel bookings, 30% of all accommodation bookings were made via the conference organisers. This was closely followed by internet usage (28%), while a further 14% made their bookings directly with the accommodation provider. This means that 70% of accommodation bookings are not made through the conference organiser. This issue was raised by a number of venue representatives during the interviews conducted for this research. Three of the venues raised it as an issue only in terms of calculated proportion of revenue attributable to MICE business, although one venue mentioned the frustration of blocking out rooms and then not having them used by the PCO. A further two venue representatives noted that they make sure the rate offered by the event organiser is the best rate that the delegate will get, therefore encouraging bookings through the event organiser.

The average length of stay in the region reported by delegates was 4.34 nights. There was significant variance between lengths of stay when grouping respondents by their place of residence. New Zealanders from the North Island stayed the least amount of time, an average of 3.18 nights while International Visitors from countries other than Australia stayed the longest at 5.67 nights.

Most visitors (81.82%) reported having visited the region before. The length of time since their last visit varied greatly from less than a week to 25 years. North Island residents appear to be frequent visitors to the region with around 64% of these respondents reporting they had visited in the previous six months.

Table 7.4 - Delegates length of stay by place of residence

Residence	Mean nights	Standard Deviation
North Island	3.18	1.54
South Island	4	0.82
Australia	5.36	1.87
Other international	5.67	1.97
All Grps	4.34	1.98

The majority (75%) of visitors reported not visiting any other regions during that trip. Of the 16 respondents who were planning to visit other regions, 11 were from Australia and a further 3 from other countries, indicating that generally New Zealanders do not visit other regions on trips to attend MICE events.

Visiting delegates were asked what other activities they participated in during their visit to the region. The most commonly selected activity was dining out at a restaurant or cafe, with nearly 80% participating. Also commonly selected activities were shopping (57%), walking (46%), visiting friends or relatives (41%) and sightseeing (35%).

Table 7.5 – Activities participated in by delegates

Activity	Number participating	Percent participating
Adventure activities/sports	9	11.59
Bar/nightclub	14	20.29
Boat trip	20	28.99
Concert/theatre	7	10.14
Eating out/restaurant	56	79.71
Gallery visit	6	8.70
Gambling/casino visit	6	8.70
Gentleman’s club/Adult entertainment	0	0
Historic site visit	10	14.49
Maori performance/ cultural visit	14	20.29
Museum visit	12	17.39
Shopping	40	56.52
Sightseeing	24	34.78
Sport event	2	2.90
Vineyard/winery visit	4	5.80
Visiting friends or relatives	28	40.58
Walking	33	46.38

When looking at the total number of activities visiting delegates participated in the mean is 4.19 per delegate, however, there was significant variance (p=0.006) in this number when grouping respondents according to place of residence. North Island residents participated in the least amount of activities, with a mean per person of 2.75%, while international visitors other than from Australia, participated in the most with a mean of 7 activities per person. Given that international visitors also stayed the longest in the region and North Island residents the least amount of time, it would appear that length of stay is a determining factor for activities participated in. This could be an important consideration in planning of marketing activities.

Table 7.6 – Number of activities per delegate by place of residence

	Valid N	Mean	Minimum	Maximum	Std.Dev.
All groups	69	4.19	1	10	2.50
Auckland	3	3.33	2	5	1.53
Residence Missing	2	4	4	4	0.00
North Island	28	2.75	1	9	1.67
Australia	26	5	1	10	2.62
Other International	6	7	4	10	2.19
South Island	4	5.5	2	8	2.52

7.2.4 Motivation, Satisfaction and Future Intentions

Of the respondents who travelled to Auckland from outside the region, 91% indicated that attending the event was the primary purpose of their visit to the region.

When looking at factors that influenced respondents' decisions to attend the event only four factors had a mean score that indicated they were considered important. Of these the item that scored the highest was the business and/or educational content of the event. This was followed by networking and business opportunities and then regular attendance at the event every time it is held. The final factor rated as important in the decision to attend was the availability of funding. An additional factor of having been directed by their employer to attend becomes important when excluding medical professionals from the sample. This results in a mean of 3.77 with a standard deviation of 2.57. The difference is probably attributable to high number of medical professionals in the sample who are essentially self-employed.

As can be seen from table 6.6, most decision factors have a high standard deviation, with many being above two, which is certainly considerable for items scored on a seven point likert scale. This indicates that there is great deal of variance in the factors influencing the decision to attend events.

Table 7.7 - Attendance Motivation

	Valid N	Mean	Median	Min	Max	Std.Dev
Directed by employer to attend	93	3.48	3	1	7	2.59
Attend this conference every time it is held	93	4.11	4	1	7	2.42
Networking/business opportunities	92	4.48	5	1	7	2.13
Business/education content of the conference programme	100	5.18	6	1	7	2.11
Social programme of the conference	94	2.64	2	1	7	1.85
Opportunity to visit somewhere new	88	2.11	1	1	7	1.66
Previous visit/s to Auckland	85	1.67	1	1	6	1.26
Safety/security of the Auckland region	87	1.72	1	1	7	1.42
Accommodation and hotel facilities	89	1.99	1	1	7	1.59
Food and dining opportunities	90	2.16	1	1	7	1.75
Opportunities for sightseeing and/or leisure activities	89	2.26	1	1	7	1.76
Availability of nightlife	88	1.51	1	1	7	1.33
Time availability	92	3.20	3	1	7	2.04
Funding availability	93	3.52	4	1	7	2.23
Transport costs	87	2.54	2	1	7	1.85
Accommodation costs	89	2.34	1	1	7	1.83
Conference costs including registration and optional extras	92	2.85	2	1	7	2.05
Exchange rate (overseas visitors only)	59	1.59	1	1	7	1.35
Comparisons with other events held this year	84	2.37	1	1	7	1.79
Other	35	2.40	1	1	7	2.42

Delegates were asked to rate their level of satisfaction against a number of individual items as well as their overall satisfaction with attendance at the event. The rating scale was a seven point likert type scale with one representing ‘very dissatisfied’ and ‘seven’ representing very satisfied. The mean scores for each item, including overall satisfaction indicate that overall delegates were satisfied with the MICE product the region offers. The items that scored the highest mean scores were the organisation of the event (6.18) and the quality and cleanliness of the accommodation (6.00). The only item that did not have a mean score above five was 'other' (4.14), where delegates were asked to specify what they were ranking at that time. Only 14 delegates responded to this question and of those only three specified what they were ranking. These three responses were comprised of two individuals providing a very dissatisfied rating to (1) the cost of the event and (2) lack of free internet access and one delegate providing a very satisfied ranking and simply writing family where asked to specify.

Table 7.8 – Delegate Satisfaction

	Valid N	**Mean**	**Median**	**Min**	**Max**	**Std.Dev**
Organisation of the event	101	6.18	6	3	7	0.91
Programme of the event	100	5.65	6	2	7	1.19
Networking opportunities	89	5.34	6	1	7	1.40
Social programme of the event	81	5.22	5	1	7	1.36
Location/accessibility of the venue	100	5.99	6	3	7	1.01
Set-up, size and comfort of meeting facilities at venue	98	5.99	6	2	7	1.14
Places to sit at the venue	94	5.69	6	1	7	1.30
Toilet facilities at the venue	96	5.97	6	1	7	1.19
Other facilities at the venue	85	5.79	6	1	7	1.17
Food and Beverages at the venue	93	5.52	6	1	7	1.40
Range of accommodation options	56	5.52	5	3	7	1.16
Quality and cleanliness of the accommodation	66	6.00	6	3	7	1.02
Value for money of the accommodation	57	5.49	6	3	7	1.21
Range and availability of transport to and from the region	64	5.58	6	3	7	1.10
Range and availability of transport within the region	56	5.18	5	2	7	1.19
Safety and security within the Auckland region	74	5.47	5.5	3	7	0.97
Food and dining opportunities	72	5.71	6	1	7	1.18
Opportunities for sightseeing and/or leisure activities	51	5.55	6	3	7	1.12
Availability of nightlife	39	5.13	5	1	7	1.49
Other	14	4.14	4	1	7	1.99
Overall satisfaction with your attendance at this event	96	5.77	6	2	7	1.03

When looking at variance in levels of satisfaction based on place of residence, there was a significant variance for three items: Networking opportunities (p=0.029); Places to sit at the venue (p=0.02); and Transport within the region (p=0.01). Auckland residents and visitors from Australia were most satisfied with the networking opportunities provided by the event they attended, while other international visitors were the least satisfied. That said even these other international visitors were at least somewhat satisfied with the networking opportunities provided with a mean score of 4.5 from a possible seven. In terms of places to sit at the venue, again it was the international visitors from places other than Australia that were least satisfied, with a mean score of four. Visitors from the South Island were the most satisfied with a mean score of 6.25. South Island visitors were the most dissatisfied with the range and availability of transport within the region, with a mean score of 3.33, indicating they were in fact slightly unsatisfied. All other residential groupings mean scores indicate the delegates surveyed were at least mostly satisfied with transport options within the region.

Table 7.9 – Satisfaction by place of residence

Place of residence	Networking opportunities		Places to sit at the venue		Availability of transport within the region	
	Mean	**Std Dev**	**Mean**	**Std Dev**	**Mean**	**Std Dev**
Auckland	5.73	1.04	5.76	1.35	5.46	1.33
North Island	4.77	1.90	5.85	1.29	5.38	0.96
South Island	5.25	0.96	6.25	0.50	3.33	0.58
Australia	5.73	0.96	5.70	1.14	5.40	0.88
Other international	4.50	1.22	4.00	1.26	4.33	1.37
All Groups	5.34	1.40	5.68	1.30	5.18	1.17

All delegates were asked four questions regarding their intentions to attend the same event in the future, recommendations for the event and the region, and intentions to visit the region again. Like the previous sections a seven point likert type scale was used in this section, with one indicated they definitely would not and seven indicating they definitely would. In terms of intentions to visit the region again the means score was 5.84, indicating many visitors were likely to visit again. There was significant variance in responses when grouping by place of residence ($p<0.001$), with South Island residents indicating they were most likely to visit again and International visitors from places other than Australia least likely, however, with a mean score of 4.83, their repeat intentions can still be viewed as promising for repeat visits. Likewise, the mean score of 5.45 for recommending the region to colleagues and business associates can be viewed as a positive sign for the region.

7.3 Exhibitors

Questionnaires were distributed to exhibitors at four MICE events in the Auckland region between July 2009 and March 2010. Unfortunately only one of these events yielded any responses, resulting in 14 useable responses being collected. This event was a public exhibition and 80 questionnaires were distributed at this event.

7.3.1 Profile of respondents

All respondents to the exhibitor questionnaire were New Zealand residents, primarily from the North Island with the exception of one from the South Island. Of the North Island residents, two are from the Auckland region. The age of respondents is all in the older age brackets, with four respondents aged 45-54 years, three aged over 65 years and the remainder aged 55-64 years. There were four male respondents, with the remaining ten being female. Years of experience as an exhibitor varied greatly from one to thirty years, with the average being twelve years of experience.

The organisations they represented were all private companies with the exception of one not for profit organisation. The organisations were all based in New Zealand, and were located in the same place the representatives reside. All organisations had exhibited at other exhibitions within New Zealand in the previous year, however, the number of previous exhibitions varied from two to forty exhibitions. Only three organisations had exhibited at shows outside New Zealand in the previous year. Again there was considerable difference in the number of prior exhibitions, with two of the three having exhibited twice and one having exhibited at thousands of international events.

7.3.2 Travel Behaviour

The travel behaviour of exhibitors is markedly different to that of the delegates that participated in this study. All respondents that travelled from outside the Auckland region travelled to the region via private vehicle. The accommodation used was also very different to that of delegates, with one respondent staying in a hotel, three in motels, four with friends or relatives and two staying in a holiday park. Those staying in commercial accommodation all made their bookings directly with the provider.

Although the sample of exhibitors is unable to be viewed as representative of the entire population of exhibitors at MICE events in the region, this markedly different travel behaviour provides some food for thought in regard to this group of MICE consumers. The options selected by these exhibitors are certainly cheaper options that those utilised by delegates. While this may be just a reflection of the nature of the event and the exhibitors that completed questionnaires, it may also be a sign that exhibitors are consciously trying to minimise the cost associated with exhibiting.

The exhibitors from outside the Auckland region stayed in the region for either three or four nights. As the event was a three day event, this in effect means that they did not stay for additional nights in the region. All respondents had visited Auckland before and for most in the previous year, with the exception of one South Island resident whom had visited 18 months earlier.

As is to be expected given the length and frequencies of stay and length of the event, exhibitors participate in few activities outside of the actual event.

Table 7.10 - Activities participated in by exhibitors

Activity	**Number participating**
Adventure activities/sports	0
Bar/nightclub	0
Boat trip	0
Concert/theatre	1
Eating out/restaurant	8
Gallery visit	0
Gambling/casino visit	0
Gentleman’s club/Adult entertainment	0
Historic site visit	0
Maori performance/ cultural visit	0
Museum visit	1
Shopping	4
Sightseeing	1
Sport event	0
Vineyard/winery visit	0
Visiting friends or relatives	3
Walking	0

7.3.2 Exhibitor Satisfaction

Exhibitors were asked to rank their satisfaction with a number of elements of their exhibiting experience on the particular occasion. They were also asked to rank their overall satisfaction with the experience. Like the delegates, they were asked to use a seven point likert scale for their rankings, where one equalled extremely dissatisfied and seven equalled extremely satisfied. Overall the exhibitors surveyed were satisfied with their experience exhibiting at the show, the mean score for overall satisfaction being 5.17. This overall score is 0.6 points lower than the overall satisfaction for the delegates surveyed. This is likely to be in part attributable to low levels of satisfaction with some venue related factors such as food and beverage at the venue (mean=4.33) and other facilities at the venue (mean=3.82). The second reason is likely to be related to the number (mean=4.83) and quality (mean=4.92) of visitors. In fact, four exhibitors made reference to these items in the open ended question at the end of the questionnaire. Given the timing of the event (October 2009), this is further evidence of the impact of the global economic crisis and subsequent recession on the Auckland MICE sector.

Table 7.11 – Exhibitor satisfaction

	Valid	**Mean**	**Min**	**Max**	**Std.Dev.**
The number of visitors	12	4.83	3.00	7.00	1.53
The quality of visitors	12	4.92	3.00	7.00	1.51
The organisation of the exhibition	12	5.17	4.00	7.00	1.03
Location/accessibility of the venue	13	5.92	4.00	7.00	0.95
Ease of set up of stand	13	5.62	4.00	7.00	0.87
Parking	13	5.92	4.00	7.00	1.12
Space allocation for stand	12	6.00	4.00	7.00	0.95
Truck/lorry access to the centre	11	5.36	4.00	7.00	1.21
Set up scheduling	12	5.83	4.00	7.00	0.94
Dismantling scheduling	12	6.00	5.00	7.00	0.74
Power point supply	12	5.75	4.00	7.00	1.06
Cost of venue	11	4.73	2.00	7.00	1.49
Other facilities at the venue (e.g. exhibitors lounge)	11	3.82	1.00	6.00	1.83
Food and Beverages at the venue	12	4.33	1.00	7.00	1.72
Range of accommodation options	6	6.17	5.00	7.00	0.75
Quality and cleanliness of the accommodation	5	6.00	5.00	7.00	0.71
Value for money of the accommodation	5	6.00	5.00	7.00	1.00
Range and availability of transport to and from the region	3	5.67	5.00	6.00	0.58
Range and availability of transport within the region	2	5.50	5.00	6.00	0.71
Safety and security within the Auckland region	8	5.38	4.00	7.00	1.06
Food and dining opportunities	10	6.20	4.00	7.00	1.03
Opportunities for sightseeing and/or leisure activities	7	5.57	3.00	7.00	1.27
Availability of nightlife	5	5.60	5.00	6.00	0.55
Overall satisfaction with this exhibition	12	5.17	4.00	6.00	0.83

In addition to asking exhibitors to rank their satisfaction on various items, they were asked about their future intentions regarding the event and the region. Again the question used a seven point likert scale, where one equalled definitely ‘would not’ and seven equalled ‘definitely will’. The means score for visiting the region again was 6.56, which is promising for the region. In terms of exhibiting at other events in the region the score was considerably lower with a mean score of 5.08, indicating that perhaps more can be done to ensure exhibitors’ needs are being met to ensure continuing exhibitor numbers at events. As previously discussed in chapter three of this thesis there have been very few studies regarding the needs and wants of exhibitors, and none that the author is aware of, in a New Zealand context. This is potentially an area for further research.

Also a promising sign for the region is the range of scores for these future intentions. No exhibitor indicated they would not visit, exhibit in or recommend the region. The lowest score for each item was four, which indicated they were undecided or didn’t know.

Table 7.12 – Exhibitor repeat and recommendation intentions

	Valid N	Mean	Min	Max	Std.Dev.
Visit the Auckland region again	9	6.56	4	7	1.01
Exhibit at the same event next time it’s held	12	5.50	4	7	0.90
Recommend the region to colleagues and business associates	12	5.08	4	6	0.67
Exhibit at other events in Auckland in the future	13	5.08	4	7	0.95

7.4 Event Organisers

7.4.1 Profile of Events

Event organisers were surveyed between June 2009 and March 2010 and during that time eleven useable responses were collected. Although this is fewer responses than had been hoped for, the responses do represent a number of different venues, types of events and types of host organisations. Ten separate venues are represented by the sample, and these venues include some hotels and multipurpose facilities. Six of the venues represented are located in the CBD, with the remaining four being suburban in location.

The events for which the responses represent include five conferences, two exhibitions, a meeting, an awards ceremony and an incentive gathering. The two exhibitions were the most attended events with several thousand attending each exhibition. The incentive gathering and awards ceremony were the next largest of the events with 850 and 800 attendees respectively. The conferences and meeting varied in attendance with the smallest having 40 delegates attend and the largest had 260 delegates.

Four of the conferences were hosted by an association, and one by a government organisation. The remainder of the events were hosted by private sector businesses. The length of the events varied from half a day in the case of the awards ceremony to three and a half days for one conference. The average duration of the events was 2.2 days.

Eight of the events are recurring events. Six of these occur annually and the other two bi-annually. The bi-annual events were one of the association conference and the government conference. Two of the private organisation conferences and the meeting do not re-occur.

7.4.2 Profile of Organisers

The organisers of the events were all New Zealand residents, two from the South Island, three from the North Island and the remainder living in Auckland. The organisers were predominantly female, with just two male respondents. The ages of the respondents varied greatly with the youngest selecting the 25-34 years category and the oldest the 55-64 category.

In terms of experience in organising events the greatest length listed was 25 years and the least was the organiser for which the event they responded in relation to was the first they had organised. The mean number of years of experience was 11.45 with a standard deviation of 9.82. All of the respondents were employed directly by the host organisation, on either a temporary or ongoing basis. Six of the respondents were professional conference organisers (PCO) indicating the other respondents had other roles in the host organisations. The PCO's tended to have the most experience in organising events, with four of them having 20 years of more experience.

7.4.3 Planning, Decision Making and Satisfaction for the Events

Decision making processes for the events varied considerably, both in terms of who was responsible for the decision making and the length of time in which the event was planned. Having a committee responsible for decision making was the most common method of decision making in the sample of event organisers, with six events using this method. For two of the events the decisions were made by the organiser who completed the questionnaire and the remaining events had decisions made by senior management.

Planning for the events started on average eleven months prior to the event, with the shortest planning period being three months for one of the smaller corporate conferences. The longest planning period was eighteen months and that was for two association conferences. With the exception of two of the events, the decision to host the event in the Auckland region was made at the start of the planning process. For the other two events the decision to hold the event in Auckland was made prior to the commencement of planning. For one event this decision was made three months prior to planning starting and in the other case the month prior to planning starting. With the exception of one private sector meeting all the conferences that had decisions being made by a committee had planning periods of at least twelve months.

This would appear to contradict the finding from the supplier interviews that lead times have decreased considerably. However it worthy of note that the events organised by committee were predominantly association hosted events. Association events only account for around 15% total number of events hosted in any given period (Ministry of Tourism, Conventions and Incentives New Zealand, & Convention Bureaux New Zealand, 2010). The planning period for the events hosted by private sector organisations were considerably shorter.

In order to determine the reasons why Auckland was selected as the destination in which these events were held, organisers were asked to rank the importance of a number of factors, derived from the literature, in the selection of the region. Again a seven point Likert scale was used where one equalled ‘not at all important’ and seven equalled ‘extremely important’. As can be seen in table 7.13, going by the means scores most of the factors were not considered to be overly important to the decision. That said, when looking at the range of scores for each factor and the standard deviation for each factor it becomes clear that what is seen as important for one event is not necessarily important for another. Unfortunately the sample size in this study is not large enough to determine if certain factors are more important to types of events or type of host organisation. Further research in this area would be useful for the region, as it would allow for the customisation of marketing activity to attract specific events.

While there was not a lot of consensus regarding what is important when selecting Auckland as a region, suitability of the venue, with a mean score of 5.55 appears to be an important factor for most events. As identified in the previous chapter, the region has a range of venues hosting MICE events. These vary in settings, size and type, and this is considered to be a strength of the region.

The highest mean score (6.5) was the ‘other’ factor, where respondents were asked to specify what that factor was. Although only two respondents selected this response the answers they gave are of interest. One of the respondents listed ease of access for the organisers and ability to keep costs down by eliminating travel costs for staff. The other highlighted the association they represented rotate their annual conference through the regions of New Zealand. Another organiser of an association conference indicated that their association also rotated venues later in the survey when they listed that they would host another event in the region next time it was Auckland’s turn.

The organisers were also asked about their satisfaction with their experience of hosting the event in the region on a scale of one to seven, where one equalled ‘extremely dissatisfied’ and seven equalled ‘extremely satisfied’. The mean score for this rating was 5.27, indicating that event organisers were satisfied with the experience of organising their event in the Auckland region. All of the organisers, with the exception of the organisers of the exhibitions scored their satisfaction as at least five out of seven, with four rating the experience as six from seven and two rating the experience seven out of seven. The two exhibition organisers were actually rather dissatisfied by the experience of organising in the region, rating their experience as two and three out of seven.

In addition to providing a rating the organisers were also asked to briefly explain why they rated the region the way they did. In the case of the exhibitions, they cited reasons such as traffic and competition from other events limiting the number of attendees at their show. This is somewhat concerning for the region, for if exhibitions are not achieving required attendance levels, they will not be held in the future. This does present an opportunity for venues and BTA to be working with exhibition organisers to more effectively promote shows.

Table 7.13 – Importance of factors in destination selection

	Valid N	**Mean**	**Min**	**Max**	**Std. Dev.**
Suitability of the venue	11	5.55	1	7	1.75
Previous event held in the Auckland region	8	4.50	1	7	2.20
Strong local host/sponsor in Auckland	10	4.00	1	7	2.67
Large local market base for host organisation to draw upon	9	4.78	1	7	2.28
Safety and security of Auckland	9	2.67	1	5	1.66
Air access to Auckland	10	3.40	1	6	2.17
Road access to Auckland	9	3.00	1	5	1.94
Access to public transport	9	3.44	1	5	1.74
Climate	10	3.70	1	7	2.31
Cosmopolitan nature of Auckland	9	4.00	1	6	2.00
Referrals from associates	9	3.22	1	5	1.64
Range and standard of venues in Auckland	10	4.50	1	7	2.01
Range and standard of accommodation in Auckland	10	3.50	1	7	1.90
Range of social activities available	9	3.33	1	6	1.87
Range of leisure activities and sightseeing opportunities available	9	3.00	1	5	1.73
Support of Auckland Convention Bureau/Tourism Auckland	9	2.78	1	6	2.05
Cost of travel to Auckland	9	3.11	1	5	1.62
Cost of the venue	10	4.30	1	7	2.06
Cost of event related services (e.g. a/v equipment hire)	10	4.30	1	7	2.06
Cost of food and beverage	10	3.70	1	7	2.21
Availability of packages (e.g. package including venue, accommodation and city tour)	10	3.10	1	7	2.02
Proximity of venues and accommodation to CBD	11	3.82	1	7	2.18
Proximity of venues and accommodation to airport	9	3.00	1	6	1.80
Proximity of venue to event attendees	4	4.00	1	6	2.16
Other	2	6.50	6	7	0.71

On the other hand the organisers of the other events were definitely satisfied with their experience hosting the event in the Auckland region. While most of these organisers did not provide an answer as to why they had rated their experience that way, the four that did reply, gave similar reasons. The reasons were related to the venue, the accommodation and ease of access.

7.5 Situational Analysis

In this part of the chapter the current situation of the MICE sector in Auckland is reviewed. This review expands on the initial analysis undertaken following the supply side interviews, by drawing on the findings from the questionnaires from consumers. Initially the strengths and weaknesses of the sector are addressed. Table 7.14 provides a summary of strengths that have been identified and table 7.15 the weaknesses. The additional strengths and weaknesses identified are discussed in detail in the following text. Likewise, where the questionnaire findings provide additional evidence for previously identified strengths and weaknesses, this is also discussed in the section.

Following the discussion of current strengths and weaknesses is the identification and discussion of future opportunities and challenges, presented in table 7.16. These findings also draw of the interview findings addressed in the previous chapter use the questionnaire findings to supplement and reinforce the initial findings.

7.5.1 Strengths and Weaknesses

As can be seen by table 7.14, the responses from the demand side of the sector did not yield a large number new strengths or weaknesses. The three new strengths identified are the accommodation offered within the region, the ability of the region to satisfy its delegates and that events held in the region are well organised.

The accommodation offered by the region is a strength that has been identified from all three of the consumer samples that were surveyed. When looked at as a whole, delegates and exhibitors who were visitors to the region utilised a great range of accommodation styles and ratings, ranging from holiday parks and motels through to five star hotels. Each of these samples was questioned about their satisfaction with the range of accommodation options, the quality and cleanliness of the accommodation, and the value for money of the accommodation. With the lowest mean score being for the delegates at 5.49 out of seven for the value for money of the accommodation, it is clear that that overall both groups were more than just satisfied with the accommodation in the region. Further evidence of accommodation being a strength of the region can be seen in the event organiser survey findings. Two of the event organisers, one with a satisfaction rating of six and the other of seven, listed the accommodation for delegates as one of the main reasons they rated Auckland their experience of organising the event in Auckland the way they did.

The second strength identified as a result of the analysis of the questionnaires, was the region's ability to satisfy almost all of the delegates attending the events in this study. While it is not possible to know if this is the case for all events, for the events where delegates were surveyed in this study, the overall satisfaction with their attendance received a mean score of 5.77 from a possible seven. This indicates that, while there are definitely aspects of the regions MICE product offering that can be improved; overall the region is doing a good job of hosting delegates attending MICE events.

Closely related to the strength of the region in satisfying delegates, is that events held in the region are generally well organised. This is evident from the delegate survey where the mean score for satisfaction with the organisation of the event was 6.18 out of a possible seven. Further evidence can be found in the fact that the event organisers, although not all professional event organisers, had considerable experience in organising events.

In addition to the identification of these three new strengths, the questionnaire data revealed addition support for three of the previously identified strengths. The event organiser questionnaire provided additional support for the range of venues offered as being a strength for the region. Suitability of the venue scored a mean of 5.55 out of seven in terms of importance in the destination selection decision, indicating finding the right venue is important and this was achievable in the Auckland region for these events. In addition four of the organisers who were satisfied with the Auckland region made specific reference to the venue in providing the reasons they had rated Auckland that way.

Table 7.14 – Strengths of the Auckland region for hosting MICE events

Attributes of the region	**Systems and processes**	**Marketing Presence**
Range of venues and associated facilities and services	Client feedback systems	Number of supply organisations exhibiting at trade shows
Availability of transport to Auckland	Human resource management practices	Number of supply organisations with internet presence
Diverse environments of the region	Environmentally friendly practices and initiatives	
Range of activities available in the region	Product delivered in the region is satisfying for most delegates	
Accommodation offered is clean, good quality and is generally considered good value for money	Events are well organised	

Support for the strengths of availability of transport to the region and the range of activities offered within the region can be drawn from the delegate survey. The delegates were asked to rate their satisfaction with the range and availability of transport to the region, and opportunities for sightseeing and/or leisure opportunities. The mean satisfaction scores for these were 5.58 and 5.55 respectively. This indicates that while there is still space to improve these two aspects of the region, they are currently satisfactory for delegates and therefore can be considered a strength.

The questionnaire findings were not particularly useful for identifying new weaknesses or finding additional support for previously identified weaknesses of the region. This is primarily due to the fact that most questionnaire respondents were at least satisfied by their event experience. Some additional support for three previously identified weaknesses was found from the questionnaire data. These three weaknesses were the inadequacy of public transport in the region, the lack of collaboration between stakeholders and the lack of a compelling marketing message.

Some additional support for the inadequacies of public transport in the Auckland region can be drawn from the delegate survey responses. Delegates were asked to rank their satisfaction with the range and availability of transport within the region. The overall mean score was 5.18 indicating that overall the delegates were satisfied with the transport provisions; however only a little over half the delegates (56) responded to this question, indicating a great number had not used any transport within the region. Additionally there were significant variances between groups when sorted by place of residence. South Island residents were slightly unsatisfied (mean = 3.33) and visitors from overseas other than Australia were only just satisfied (mean = 4.33). These scores for satisfaction seem to indicate that in comparison to other places public transport in the Auckland region is not particularly good.

Some additional evidence of the lack of collaboration between stakeholders can be found in both the delegate and event organisers' questionnaires. In the case of the event organiser questionnaires this is evident in regard to the organisation of the exhibitions that participated in this study. In both cases the exhibitors were not satisfied by their experience of organising the event in question and the reasons for their dissatisfaction were related to their finding it hard to attract attendees. Enhanced collaboration between stakeholders could assist these event organisers in improving attendance levels.

Table 7.15 – Weaknesses of the Auckland region for hosting MICE events

Infrastructure	**Perception & marketing**	**Communication, collaboration & coordination**
No international standard convention centre	Perception that NZ is too far away	Lack of coordination & support at local/regional government levels
Lack of accommodation on-site/adjacent to many large venues	Perception of Auckland by New Zealanders outside the region	Lack of collaboration between stakeholders
No means for recycling food scraps	Lack of a unified compelling regional marketing message	Limited systems for sharing relevant feedback with other supply organisations
Lack of supporting infrastructure e.g. public transport, cruise ship terminal		

From the delegate survey there are two factors that provide some support for the concept that current levels of collaboration between industry stakeholders is a weakness of the region. The first of these factors is the satisfaction scores for the social programme of the event. With a mean score of 5.22, this factor had one of the lowest satisfaction ratings. With collaboration between stakeholders the social programme of events could perhaps be improved to offer a unique and ultimately more satisfying experience. Secondly in support of this apparent weakness, is the low level of participation in the activities and attractions offered within the region. The mean number of activities participated in was only 4.19, and the most popular of these were eating out, shopping, walking, and visiting friends and relatives. Comparatively few delegates engaged in activities such as gallery visits, boat trips and attending concerts or theatre performances during their stay. Further collaboration between stakeholders (i.e.

venues, event organisers and activity providers) could encourage further participation in activities that not only encourage extended duration of stay in the region, but also showcases what the region has to offer.

The event organiser survey provides some additional evidence that the region lacks a compelling marketing message to attract events to the region. This can be seen in the way in which the organisers rated various attributes in terms of importance when selecting Auckland to host the event. Suitability of the venue and the other option were the only factors that rated above five out of seven, with mean scores of 5.55 and 6.5 respectively. One of the two respondents who replied to the other listed the other factor as being that Auckland was the only place in New Zealand with a venue big enough, while the other said that it was simply Auckland's turn. Another organiser also indicated when questioned about the reasons for rating satisfaction the way they did that the event needed to happen in Auckland due to the nature of the event. Also indicated at the same point were a further two events that were held there as it was simply Auckland's turn to host the event, while another indicated that it was easier for the organisers as they were located in Auckland. These data indicate that Auckland is not being selected due to 'destination appeal'. This can be assumed to be in part because Auckland is lacking a unique and compelling marketing message for the MICE sector.

7.5.2 Opportunities and Challenges

As was the case in identifying weaknesses, the questionnaire findings did not reveal a lot of new information in terms of opportunities and challenges. In fact only two opportunities were identified from the survey findings. These opportunities were: 1) working together to promote not only the region but also individual events; and 2) increasing participation in non event related activities.

The supplier and venue interviews revealed that there is a need for stakeholders in the region to work together to effectively market the region and that this presented a real opportunity for the region to capitalise on. The questionnaire data, in particular the event organiser findings, show that in addition to working together to promote the region, there is an opportunity for the stakeholders to work together to promote individual events. The two organisers of the exhibitions that participated in the survey were not satisfied by their experience of organising their events and this was primarily due to the difficulty they experienced in attracting event attendees. In addition to the exhibitions finding it hard to attract attendees four of the other events had fewer than expected delegates, two of these having less than half the expected number. Perhaps if other stakeholders, such as the applicable venues and BTA had been more involved in the marketing of these events this would not have been the case.

The second opportunity determined as a result of the questionnaire analysis, is to lift event attendees participation in non event related activities. The mean number of activities that delegates participated in was 4.19. While this does not seem a particularly low number of activities, it worth noting that the most commonly reported activities were dining out (80%), shopping (57%) and walking (46%). Comparatively few delegates were engaging in activities such as museum (17%), gallery (9%) or winery (6%) visits or attending a concert or theatre performance (10%). Encouraging delegates to engage in these kinds of activities not only showcases what the region has to offer, but also in itself generates additional spending and may increase length of stay in the region, also generating extra expenditure in the region.

Table 7.16 – Opportunities and challenges for the Auckland MICE sector

Challenges	*Opportunities*
Coping with the economic climate	Working together to promote the region and individual events
Adjusting to shorter lead times	Improved coordination following the introduction of the Auckland Super City
Coping with increased competition from other destinations	Construction of an international standard convention centre
Keeping up with advances in information and communication technology	Capitalising on clean green image of New Zealand
Ensuring ongoing commitment to environmental initiatives	Capitalising on natural assets of the region
Managing the logistics of hosting Rugby World Cup 2011	Capitalising on Rugby World Cup 2011 as a means to showcase the region and show that the region can host large events
Overcoming negative perceptions of Auckland by other New Zealanders	Increasing participation in non event activities in the region

7.6 Conclusion

This chapter began by presenting the findings from the survey of delegates attending MICE events in the Auckland region during the period July 2009 to March 2010. Overall these findings were a positive sign for the region with most delegates being more than satisfied by the attendance experience. The findings also assisted in highlighting some areas where the region can do better, specifically in terms of working together as a sector, improving public transport in the region and encouraging delegates to engage in more non event related activities.

Following this, the findings from the exhibitor survey were presented. These questionnaires were collected from exhibitors at one event held in October 2009. While the usability of the data from this survey is limited, it did still yield some information that supports the previous supplier interview finding that the current economic climate is having a significant impact on the MICE sector in the region.

The findings from the event organiser survey were presented next. Like the delegate survey findings, these findings were mostly positive for the region. Most event organisers were satisfied by their experience of organising an event in the region. The exception to this was the two exhibition organisers. Again this highlighted the need for stakeholders to work together to not only promote the region, but also individual events. These findings also highlighted the lack of a unique compelling marketing message for the region. The region was being selected due to the need for a large venue, convenience for the organisers, or simply because it was Auckland's turn.

The final section of this chapter brought together all of these findings along with the finding from the supply side interviews. The combined findings were then used to determine the strengths and weaknesses of the MICE sector in Auckland along with the opportunities and challenges the sector is facing. The next chapter begins by outlining how this situational analysis was used as the basis of a Delphi panel process.

Chapter 8 – Delphi Panel Results

8.1 Introduction

A Delphi panel was employed as the final stage of data collection in this research project. Unlike the previous data collection, described in the previous two chapters, this stage of the data collection was not so much about finding new information, but ordering and confirming findings from the previous data collection. Ordering and confirming the previous findings was an important step in achieving the desired outcome for this project of making recommendations to ATEED as content that should be included in a strategy for the sector. This chapter reports on the findings from the Delphi process.

The first part of this chapter provides an overview of the process. Firstly, the two purposes for which the Delphi process was employed are introduced. These purposes were to: 1) Confirm the factors included in the situational analysis; and 2) Assess the initial level and increase consensus regarding the situational analysis. Following this, and overview of the panel composition and questionnaire are provided.

The later parts of this chapter look at the findings in relation to the two purposes of the Delphi panel process. The level of consensus is addressed first. An overview of how consensus levels were assessed is provided and then the findings in relation to individual items from the questionnaire are presented for each of the Delphi rounds. As will be seen in this discussion, the Delphi process was successful in its purpose of increasing levels of consensus amongst panel members.

Following on from this is an analysis of the panel's perception of the items included in the situational analysis, as per the previous chapters. In most cases the items included in the situational analysis were confirmed as being correct by the Delphi panel. The final section of this chapter addresses how these findings are to be used to make recommendations to ATEED regarding the development of a strategy for the Auckland region's MICE sector.

8.2 Purpose of the Delphi Panel Process

The Delphi panel was employed for two main purposes. The first of these was to confirm what industry stakeholders see as the current strengths and weaknesses of the sector and the future opportunities and challenges that the sector faces. Undertaking this process of confirming industry stakeholder views also began to place order on the findings from the questionnaires and interviews, allowing for recommendations to be made as to what should be addressed in a strategy document.

The second main purpose of the Delphi panel was to assess the initial level, and to enhance, consensus amongst industry stakeholders as to the priorities for the development of the sector. As discussed in earlier chapters, stakeholder participation in planning processes is an important component in effective planning. In instances where stakeholders have had an active role in determining the contents of a strategy document, the support for that strategy document and its implementation is enhanced.

8.3 Delphi Process and Panel Composition

The Delphi process involved three rounds of questionnaires being distributed to a pre-selected panel. The questionnaire was developed based on the findings from the interview and questionnaires as detailed in the previous two chapters. The questionnaire was asked respondents to indicate how much they agreed with a series of statements using a likert scale of one to seven, where seven indicated they believed the statement to be completely true and one completely untrue. The questionnaire was divided into two sections. In the first part of the questionnaire each statement was based upon a strength or weakness previously identified, while the statements in the second part were based upon an opportunity or challenge.

In the second and third round of the process panel members were also provided with the mean scores for each statement from the previous round. In these rounds panel members were also asked to provide a brief explanation if the rating for each statement was more than 1.5 points from the previous mean score. A complete copy of the first round questionnaire can be found at Appendix I of this thesis. The statements are also shown in tables 8.1 and 8.2. Also shown in tables 8.1 and 8.2 are the mean rating scores and standard deviation for each of the three rounds of the Delphi panel process. The meaning and implications of these scores are discussed in the following sections of this chapter.
The Delphi panel was comprised of sector stakeholders whom had previously been interviewed as part of this research. Initially the panel consisted of 13 members, who represented a good cross section of those who had previously been interviewed. Eight of the panel represented venues, which included two multipurpose facility, two dedicated conference facilities, a smaller regional boutique hotel, two CBD hotels and one suburban hotel. Of the remaining five panel members, two were professional event managers; one represented an audio-visual provider, one an event equipment hire provider and one a coach transport company.

During the course of the three rounds of questionnaires, there was significant attrition. All 13 panel members completed the first questionnaire. The number completing the second questionnaire dropped to 12, with the representative of equipment hire provider not completing the questionnaire. In the third and final round eight completed questionnaires were collected from panel members, with the representatives of the audio-visual provider, the boutique hotel, one the dedicated conference facilities and one the CBD hotels not returning a questionnaire.

8.4 Achieving Consensus

One of the purposes of the Delphi panel was to assess the initial level of consensus amongst panel members for each of the statements, and to then build consensus further. Achieving consensus amongst panel members is an important element of the Delphi process. As discussed earlier in chapter four of this thesis stakeholder 'buy in' to strategy and plans is essential for their successful implementation. One of the goals of this current project is to make recommendations to BTA regarding the contents that should be included in a strategy for the MICE sector in the Auckland region. Gaining consensus from stakeholders as to what the strengths and weaknesses are of the sector and what challenges and opportunities the sector faces is important for the success of the strategy to be developed.

Given the importance of achieving consensus from the Delphi panel, the next issue that needed addressing was the question of 'what counts as a consensus and how can it consensus be measured?' It was anticipated that the levels of consensus would initially be quite high. This was partly due to the way the questionnaire was derived. Having been derived from the previous data collections, many of the statements on the questionnaire were points that had been raised by the panel members. It was also in part due to the nature of the panel composition. The panel members were all a part of the same industry sector and therefore would be facing similar circumstances and issues.

Table 8.1 – Statements with scores for part one of Delphi questionnaire

Statement	Round 1		Round 2		Round 3	
	Mean	StdDev	Mean	StdDev	Mean	StdDev
New Zealanders outside of Auckland don't want to travel to Auckland for MICE events.	2.62	1.62	2.78	1.25	2.4	0.59
Compared to other New Zealand regions, promotion of Auckland as a MICE destination lacks the 'wow factor'.	4.38	1.71	4.45	1.13	4.5	0.76
There is a perception that Auckland lacks activities and attractions.	4.46	1.45	5.00	1.10	5.1	0.83
Auckland has a great range of activities and attractions. We just need to educate people.	5.38	1.56	5.09	1.76	5.5	1.07
Traffic congestion, lack of parking and inadequate public transport are 'turn offs' for holding MICE events in Auckland.	4.08	1.83	4.55	1.63	3.9	1.32
The harbour, beaches, and access to the Hauraki Gulf are great draw cards for holding MICE events in Auckland.	5.31	1.57	5.36	1.29	5.5	0.93
There are too many bodies involved in promoting Auckland, it is confusing for consumers.	4.92	2.27	4.90	1.64	4.6	0.74
Organisations have been tightening their belts when it comes to MICE events. There are less events being held and events are generally smaller, shorter and less extravagant than they used to be.	5.00	1.64	5.09	1.38	4.6	1.19
Lead times for events have reduced significantly in the past five years.	6.15	1.19	6.47	0.81	6.5	0.61
The economic climate has led to new business opportunities in markets that would not have previously come to Auckland, such as Australia.	4.62	1.88	4.78	1.54	4.7	0.69
The internet has changed the way people investigate and book travel and this has impacted on the MICE sector, especially regarding accommodation bookings.	5.15	1.42	5.29	1.19	5.0	0.76
There is a lack of understanding of the sector within government agencies.	4.75	1.29	4.70	0.90	4.7	0.79
Government agencies including councils and the police are inflexible in the application of policies.	4.46	1.54	4.64	0.81	4.5	0.76
Auckland does a good job of hosting MICE events. Delegates are usually more than satisfied.	5.25	1.72	5.39	1.02	5.4	0.57
There is not enough communication between venues and suppliers in the sector.	4.23	2.02	3.75	1.62	3.3	0.92
The sector currently doesn't work together well.	4.23	1.78	4.11	1.30	4.0	0.76
New Zealand is behind other parts of the world in terms of environmentally friendly practices e.g. recycling.	4.62	2.02	4.51	1.20	4.3	1.17
New Zealand is behind other parts of the world in terms of information and communication technology.	5.08	1.65	4.82	1.83	4.5	1.69
Auckland misses out on business due to not having a large enough venue.	5.46	2.23	4.86	2.24	5.0	1.75

Table 8.2 – Statements with scores for part two of Delphi questionnaire

Statement	Round 1		Round 2		Round 3	
	Mean	StdDev	Mean	StdDev	Mean	StdDev
Rugby World Cup 2011 is a great opportunity for Auckland to show we can host large events.	6.08	1.73	5.83	1.66	6.0	0.54
There won't be much conferencing in Auckland during Rugby World Cup 2011. People will go elsewhere to meet. It might be a challenge getting them to come back to Auckland.	4.54	1.88	4.87	1.45	4.4	0.96
Rugby World Cup 2011 will be a challenge for the MICE sector. It's where a lot of the resources that are needed to host the event will come from and we don't have enough resources.	4.85	2.15	5.27	1.42	4.8	1.21
The super city will be good for tourism in Auckland. It will reduce the number of bodies involved and increase coordination for the industry.	5.38	1.83	5.49	1.86	5.6	0.91
Auckland needs an international standard convention centre to be able to compete with overseas destinations.	6.00	1.83	5.55	2.07	5.9	1.36
We need to work together to market Auckland as an attractive MICE destination.	6.23	0.94	6.48	0.68	6.7	0.48
A challenge for the sector is to get event organisers spending again.	5.15	1.38	5.20	1.17	4.7	0.89
We need to find a unique selling point that we can use to attract MICE business to the region.	5.23	1.56	5.57	1.12	5.9	0.86
We need to find ways to make Auckland more attractive to other New Zealanders as a MICE destination.	5.62	1.16	5.64	1.12	5.4	0.82
Auckland has a great range of experiences that we can capitalise on to market the region as an incentive destination	5.31	1.67	5.64	1.29	5.6	0.89
Finding ways to communicate and share information within the sector will ultimately help achieve a stronger MICE sector.	5.15	1.48	5.29	1.19	6.0	0.81
We have plenty of talented and creative people in the MICE sector. People are key to future success of the sector.	6.00	1.32	5.45	1.92	5.8	1.60
Auckland needs to improve our capability to deliver web based, real time content at events. To do this we need high speed broadband capability.	6.23	1.22	6.57	0.67	6.6	0.51
We need to ensure that we keep up with technological advancements and ensure that we are utilising new technologies in the MICE events we hold in the Auckland region.	6.31	0.78	6.57	0.67	6.7	0.47
We need to focus on becoming more environmentally friendly in the way we go about doing business.	5.31	1.66	5.18	1.17	5.5	1.18
We need to encourage MICE event organisers to choose more environmentally friendly options.	4.23	2.02	4.48	1.57	4.7	1.04
Developing the MICE sector should be a priority for the region.	5.92	1.18	6.18	1.08	6.4	0.53

Although the levels of consensus were anticipated to be quite high, it was not thought that the panel members were be in complete agreement. The organisations represented a cross section of the sector, both in terms of type of organisations and geographic location within the region. So, while the circumstances and issues the panel members faced were likely to be similar, they would not be identical. As previously described in this chapter, in rounds two and three panel members were asked to provide reasons if their rating of 'truthfulness' for a particular statement was more than one and a half points from the mean score from the previous round. Accordingly it was determined that this threshold of one and a half points should be basis of determining consensus. As it would be unrealistic to not expect there to be one or more outliers for any of the given statements, it was decided that this threshold would be applied to the standard deviation of rating for each statement. This means that where the standard deviation for a statement is 1.5 or less, consensus is deemed to have been achieved.

8.4.1 Round 1

The results from the first round of the Delphi process were for the most part in line with what had been anticipated. Table 8.1 shows the standard deviation for each statement in relation to the current situation. The statements over which consensus were achieved in the first round were:

- There is a perception that Auckland lacks activities and attractions;
- Lead times for events have reduced significantly in the past five years;
- The internet has changed the way people investigate and book travel and this has impacted on the MICE sector, especially regarding accommodation bookings; and
- There is a lack of understanding of the sector within government agencies.

While this is only four statements out of a total of nineteen statements, there were a further six statements that fell within 0.2 points of the 1.5 point threshold. This shows that the levels of consensus were initially quite high for most of the statements regarding the current situation.

When looking at future challenges and opportunities (shown in table 8.2), initial consensus was achieved for a much greater proportion of the statements. Here there was initial consensus for eight of the seventeen statements. The statements where there was initial consensus were:

- We need to work together to market Auckland as an attractive MICE destination;
- A challenge for the sector is to get MICE organisers spending again;
- We need to find ways to make Auckland more attractive to other New Zealanders as a MICE destination;
- Findings ways to communicate and share information within the sector will ultimately help achieve a stronger MICE sector;
- We have plenty of talented and creative people in the MICE sector. People are key to future success of the sector;
- Auckland needs to improve our capability to deliver web based, real time content at events. To do this we need high speed broadband capability; and
- Developing the MICE sector should be a priority for the region.

There were an additional three items less than 0.2 points from threshold. This clearly shows that there was considerable initial consensus regarding the opportunities and challenges the sector faces in the future.

8.4.2 Round 2 – Current Situation

The second round questionnaire results saw a significant increase in the levels of consensus in relation to the current situation. An additional eight statements achieved consensus, taking the total number of statements where consensus had been achieved to twelve of the nineteen statements. In addition there was another four statements within 0.2 points of the threshold, leaving only three statements where consensus was a considerable way off. These three statements were:

- Auckland has a great range of activities and attractions. We just need to educate people;
- New Zealand is behind other parts of the world in terms of information and communication technology; and
- Auckland misses out on business due to not having a large enough venue.

The four statements where consensus was close to being achieved were:

- Traffic congestion, lack of parking and inadequate public transport are ‘turn offs’ for holding MICE events in Auckland;
- There are too many bodies involved in promoting Auckland. It is confusing for consumers;
- The economic climate has led to new business opportunities in markets that would not have previously come to Auckland, such as Australia; and
- There is not enough communication between venues and suppliers in the sector.

Further confirmation that consensus had not been achieved can be seen by looking at the number of outliers for each statement. An outlier is an individual panel member whose score for a particular statement was more than 1.5 points from the means score from the previous round. For each of the statements listed above, round two of the questionnaire had at least three outliers. Auckland missing out on business due to not having a large enough venue had the greatest number of outliers with seven panel members disagreeing with the mean from the previous round. The range of activities had four outliers. Traffic and congestion and the number of bodies promoting the region had five outliers each, while the remaining statements had three outliers each.

As previously stated, where panel members significantly disagreed with the mean score from the previous round they were asked to provide a brief explanation as to why they disagreed. Table 8.3 show the statements that were given by panel members for the statements where consensus was not achieved in round two. Shown in brackets are the mean scores from round one for each statement, and after each comment in brackets is the round two score given by the respondent who provided the comment. As can be seen in this table, the number of outliers stated above does not match the number of comments given by panel members. There were instances where panel members provided comments although their score was less than 1.5 from the mean score in the previous round, as also there were instances where no comment was provided for more than 1.5 points divergence.

The comments given by panel members as to their reasons for disagreement with the previous round mean score shows there were some quite significant divergences in opinion. By and large the outliers had quite extreme views in relation to the statements presented to them, and cited personal experiences as their reasons for disagreeing with the mean score. This was similar to what was found during the interview process, where several different viewpoints were raised regarding what the current issues were for the sector.

Table 8.3 – Comments from outlying panel members regarding current situation (round 2)

Statement	Comments from panel
Auckland has a great range of activities and attractions. We just need to education people. (mean 5.38)	1) Many of the options just out of the city are not well known (7) 2) Still a sense of Auckland as being arrogant (7) 3) It is the promotion overseas that it is not getting the message through – it is for NZ but not for Auckland (7)
New Zealand is behind other parts of the world in terms of information and communication technology (mean 5.08)	1) I have nothing to add as it is a reality – broadband issue comes to mind (6) 2) I think it is actually more advanced than the USA (2) 3) NZers are exporting their IT & communication talents to other parts of the world. We should celebrate that fact (2) 4) Parts of NZ are but I don't feel public areas are doing their part – not in comparison to the rest of the world (2)
Auckland misses out on business due to not having a large enough venue (mean 5.46)	1) We have seen a number of instances of Auckland missing out on business or having to limit numbers of exhibitors and/or delegates due to the lack of large enough facilities (7) 2) This is not a problem: It is talked up by PCOs who are on a percentage of Pax attending. But no investment (1) 3) Don't think a large venue is the problem – it's our distance from major countries / continents (2)
Traffic congestion, lack of parking and inadequate public transport are 'turn offs' for holding MICE events in Auckland. (mean 4.08)	1) Many of our conferences have a large % of international delegates who stay close to the venue and are not affected by transport issues, other than the airport/hotels transfer time and possible hotel/social venue transfer time is the venue is some distance away (2) 2) The 'turn ons' such as major airport, loads of accommodation, and lots of charter transportation outweigh the 'turn offs' (7)
There are too many bodies involved in promoting Auckland. It is confusing for consumers. (mean 4.92)	1) With six councils it has been confusing (7) 2) Fresh thinking is needed in this area (7) 3) Brand dilution (7) 4) There is a stronger presence of hotels going after business but as promoting the destination as a whole I don't feel there are too many bodies (3)
The economic climate has led to new business opportunities in markets that would not have previously come to Auckland, such as Australia (mean 4.62)	1) Australian visitor arrivals and MICE sector growth have been increasing steadily in the past 5 years, not just recent (2)
There is not enough communication between venues and suppliers in the sector (mean 4.23)	1) We are not city based so therefore more of a challenge (6) 2) We have not noticed this (2)

	3) CINZ as an example: Tired old boys club. Needs new younger leadership. Things will not improve all the time Alan Trotter is on the top table (7) 4) I can't say that in my experience there is a lack – quite the opposite (2) 5) Plenty of communication, via emails, newsletters (3)

8.4.3 Round 2 – Future Opportunities and Challenges

In comparison with the statements presented for the current situation, the statements in relation to future opportunities had a high level of consensus after round two of the Delphi process. Only five of the seventeen statements were yet to achieve consensus, and of these two were within 0.2 points of the threshold for determining consensus. These statements along with comments from panel members are shown in table 8.4. As was the case for the current situation, the mean score for each statement is shown in brackets immediately after the statement and the panel members score is shown after each comment. In addition the number of outliers for each statement is also shown after each statement.

Again, the panel members who commented in relation to their score for a particular statement tended to have strong views in relation to the truth of the particular statement. These views included instances where panel members believed the statement to be completely true as well as those who believed the statement to be completely untrue. Again these results were similar to what was found during the interview phase of the project. By and large there was significantly more agreement as to what was needed moving forward, however, there were a few interviewees that held views considerably different from the majority.

Table 8.4 – Comments from outlying panel members regarding future opportunities and challenges (round 2)

Statement	Comments from panel
Rugby World Cup is a great opportunity for Auckland to show we can host large events. (mean = 5.83, outliers = 1)	1) We have always been able to host large events. Commonwealth Games 1990 as an example (1)
The super city will be good for tourism in Auckland. It will reduce the number of bodies involved and increase coordination for the industry. (mean = 5.49, outliers = 5)	1) It will gag suburbs and is already happening (1) 2) I think it will streamline tourism bodies; make it more cost effective, and hopefully increase the pool of dollars. (7)
Auckland needs an international standard convention centre to compete with overseas destinations. (mean = 5.55, outliers = 3)	1) How many times is Sky City used to capacity: that is your answer to this (1) 2) Just because we build it doesn't mean they will come. All other linked resources including transportation (charter buses and coaches) would need to increased and upgraded to meet potential demand that a bigger convention centre might bring. This would be a strain on already strained resources hit by economic recession. (3)
We have plenty of talented and creative people in the MICE sector. People are key to future success of the sector. (mean = 5.45, outliers = 2)	1) Actually we don't, when you check on their experience (3) 2) The industry is boring and risk adverse (1)
We need to encourage MICE event organisers to choose more environmentally friendly options. (mean = 4.48, outliers = 5)	1) We are in an eco environment so promote this concept (7) 2) Sustainability is consumer-led. Buyers need to make their expectations know to suppliers (6) 3) Fine but they will not pay any more (TRENZ as an example). (2)

8.4.4 Round 3 – Current Situation

The third and final round of the Delphi process saw a considerable increase in the number of statements for which consensus was achieved. In regard to the current situation, consensus was not achieved for only two of the statements. These two statements were:

- New Zealand is behind other parts of the world in terms of information and communication technology; and
- Auckland misses out on business due to not having a large enough venue.

For the statement regarding information and communication technology, there was only one panel member who disagreed with the mean score from round two of the questionnaire. The mean score from the previous round was 4.86, indicating that the panel agreed to some extent that the statement was true. The outlying panel member scored this statement as two, indicating they believe the statement to be almost completely untrue. The comment provided by the panel member as to why they disagreed with the mean score was “Relative to NZ’s small size, a large number of global innovation in IT & CT has come out of NZ, 1 e.g. is Navman”. While there was only this one outlier, the scores given by the six of the other seven panel members were above the mean score of 4.82. This shows that there is a strong feeling amongst most panel members that this statement is mostly true.

The other statement where consensus was not achieved was related to the region not having a large enough venue. In this case there were still three outliers at the completion of the Delphi process, showing there was significant difference in opinion regarding the need for the construction of an international standard convention centre. As was the case in the previous rounds the outliers had strong beliefs about truthfulness of the statement, with two panel members rating the statement as seven (completely true), and the other rating the statement at two (very little truth in the statement). One panel member, a PCO, provided a reason for rating the statement as completely true and cited knowing of instances where this had been the case. The panel member who rated the statement at two, a representative of a coach transport provider, listed “It’s not venue size that causes us to miss out – it’s flying distance from other countries that is the deterrent”. These differences in opinion regarding the need for an international convention centre are indicative of the dichotomy of desired futures for the sector. This dichotomy of views is discussed in detail in the next chapter of this thesis.

8.4.5 Round 3 – Future Opportunities and Challenges

The Delphi process was successful in achieving consensus on all but one of the statements presented regarding future opportunities and challenges. The one statement where consensus was not achieved was “We have plenty of talented and creative people in the MICE sector. People are key to the future success of the sector.” At the conclusion of round three there were still three outliers for this statement. The mean score from round two for this statement was 5.45. Two of the three outliers scored this statement at seven, meaning they believe the statement to be completely true. These panel members represented a coach transport company and an event management company. Neither of these panel members provided any additional comments. On the other hand the third outlier, a representative of a large suburban venue, scored this statement at two, indicating they think there is very little truth in the statement. The comment provided was “NO they are boring and non creative. It’s always the same old same”. This sentiment is similar to that of the interviewee representing a CBD hotel when she said in relation to the regions presence at trade shows; “other regions have fun, creative stands. We just stay plain and boring”. This shows that there is room for the sector to become more creative in the way they promote the region and also in the product that they deliver.

8.5 Revising the Situational Analysis

Overall the Delphi process was successful in achieving consensus in relation to the statements presented regarding the current position of the MICE sector in Auckland. The second purpose of the Delphi panel is to determine the current strengths and weaknesses of the sector, and the opportunities and challenges the sector will face over the coming five years. This section focuses on compiling the findings in relation to current strengths and weaknesses before going on the address the opportunities and challenges the sector is likely to face in the coming five years.

8.5.1 Strengths and Weaknesses

As previously described an initial set of strengths and weaknesses were drawn from the findings of the interview and questionnaire surveys of component this project. This initial set was then used as the basis of the statements presented to the panel in the Delphi questionnaire. Not all identified strengths and weaknesses were included in the Delphi questionnaire as they had been confirmed through the earlier data collection processes. An example of where this was the case is the previously identified strength of the range of venues and associated services available in the region. This had previously been confirmed as being the case through identifying the organisations that made up the populations of venues and suppliers. The Delphi process enabled the set of strengths and weaknesses previously identified to be further refined based as a result of confirmation by the panel members. To compile the final set of strengths and weaknesses the mean score for each of the statements in round three of the Delphi process was used. Any statement with a mean score of 4.5 or more was deemed to be considered mostly true by the panel and therefore confirmed as the strength or weakness it represented.

The Delphi process confirmed the attributes of the region as being strengths in terms of the MICE product offering. The panel agreed that the region has a great range of activities and attraction and that the harbour, beaches and access to the gulf are good selling points for the region. They also agreed that there is a perception that Auckland lacks in activities and attractions. Accordingly this has been added as weakness of the region as shown in table 8.6. A further statement that traffic congestion, lack of parking and inadequate public transport are ‘turn offs’, attracted a neutral response from the panel with a mean score of 3.9. So while the panel believe there is some truth in this, the comments from panel members in round two in particular showed additional support for the strength of the attributes of the region. One panel member, a representative of coach transport provider, said “The ‘turn ons’ such as major airport, loads of accommodation, and lots of charter transportation outweigh the ‘turn offs’.” Another panel member, a PCO, said that most delegates are visiting the region so apart from transfer time from the airport, transport in the region was not really an issue.

Table 8.5 – Strengths of Auckland as a MICE destination

Attributes of the region	**Systems and processes**	**Marketing Presence**
Range of venues and associated facilities and services	Client feedback systems	Number of supply organisations exhibiting at trade shows
Availability of transport to Auckland	Human resource management practices	Number of supply organisations with internet presence
Diverse environments of the region	Environmentally friendly practices and initiatives	
Range of activities available in the region	Product delivered in the region is satisfying for most delegates	
Accommodation offered is clean, good quality and is generally considered good value for money	Events are well organised	

In terms of systems and processes, the panel agreed with the statement “Auckland does a good job of hosting MICE events. Delegates are usually more than satisfied.” Their agreement with this statement supports the concept that the organisations involved in delivering the MICE product to consumers have in place good systems and processes. As discussed earlier in chapter three of this thesis, the drivers of delegate satisfaction include a range of factors such as the organisation of the event, the delegates’ interactions with staff at the venue and the quality of the event venue and accommodation. Given this, as delegates are leaving satisfied, the systems in place particularly around the organisation of events and human resource management practices, are strengths of the Auckland region.

In terms of weaknesses of the sector the findings from the Delphi process were useful in confirming weaknesses across all three of the previously identified categories. In the infrastructure category, the first weakness previously identified, is the lack of an international standard convention centre. The final mean score for the statement ‘Auckland misses out on business due to not having a large enough venue’ was five out of a possible seven. Although consensus was not achieved for this statement, there is clearly a number of stakeholders who believe that this is the case. In addition, in the second part of the questionnaire, panel members were presented with the statement ‘Auckland needs an international standard convention centre to be able to compete with overseas destinations’. This statement had a third round mean score of 5.9 and consensus was achieved for this statement. This clearly indicates that the sector believes the lack of such a centre is a weakness of the Auckland MICE sector.

Also in the category of infrastructure, is the limited information and communication technology (ICT) infrastructure currently in place, especially in regard to high speed broadband capability. The statement ‘New Zealand is behind other parts of the world in terms of information and communication technology’ had a mean score of 4.5 in round three, and did not achieve consensus. However, when presented with ‘Auckland needs to improve our capability to deliver web based, real time content at events. To do this we need high speed broadband capability’, the panel resounding agreed giving this statement a mean score of 6.6.

In the perception and marketing category all three weaknesses previously identified were confirmed and a fourth weakness was introduced as a result of the panel's scoring. The first of these four weaknesses is the perception that New Zealand is too far away from the main MICE generating markets to be a competitive MICE destination. While there was not a specific statement addressing this weakness, the panel member representing a coach transport provider reinforced this view through her comments in relation to another statement in regard to the region missing out on business due to not having a large enough venue. In both round two and three she disagreed with the mean score and stated that it was distance from other countries that was the cause of Auckland missing out on business.

The second weakness confirmed by the Delphi panel was that the region lacks a unified and compelling MICE marketing message. This weakness was confirmed through both the mean scores for several statements and the comments given by panel members. The first statement where the mean score confirmed this weakness was from the first part of the questionnaire and read "Compared to other regions, promotion of Auckland as a MICE destination lacks the 'wow factor'". The mean score of 4.5 for this statement indicates the panel believed there was some truth in this statement, suggesting that the promotion message is not as compelling as it could be. A comment made in relation to this statement by one panel member, a representative of a CBD hotel, was "When you see tradeshows and advertisements it seems other regions make it unique and interactive – we stay plain and boring". Also from the first part of the questionnaire was the statement "There are too many bodies involved in promoting Auckland, it is confusing for consumers". This statement received a mean score of 4.6, again indicating the panel saw some truth in this statement. This statement addressed the lack of unity in the promotional activities undertaken. The comments from two panel members in relation to this statement further reinforced that they believed the number of bodies involved in promoting the region was a weakness. The first comment, from a representative of a regionally based hotel was “With six councils and the RTO it has been confusing” while the second comment from a large multipurpose suburban venue simply wrote “Brand dilution”.

The second section of the questionnaire also yielded support for the lack of a unified and compelling promotional message being considered a weakness of the region. In terms of a compelling marketing message the statements ‘We need to find a unique selling point that we can use to attract MICE business to the region’ and ‘We need to find ways to make Auckland more attractive to other New Zealanders as a MICE destination’ had third round mean scores of 5.9 and 5.4 respectively. These scores show that the panel agreed that work needs to be done to make the product offering more appealing. ‘We need to work together to market Auckland as an attractive MICE destination’ had a mean score of 6.7, indicating that the panel almost 100% agreed that a unified and collaborative approach is needed in the region. This view was further supported by two comments made by panel members in the first round of the questionnaire. The comments “Many other areas are well ahead in offering coordinated opportunities for delegates. There is too much fighting amongst each other instead of working together” (Event equipment hire business representative) and “It is clear that other cities band together and get council support to do deals. We don’t” (CBD hotel representative) clearly show that these panel members believe other areas/cities do a better job of working together to present a unified and compelling message to potential consumers. This also provides support for the lack of collaboration between stakeholders, a weakness previously identified in the communication, collaboration and coordination category.

There were two specific statements posed addressing the situation in the region regarding activities and attractions. These were ‘There is a perception that Auckland lacks activities and attractions’ and ‘Auckland has a great range of activities and attractions, we just need to educate people’. The reason for posing these two statements was to confirm if the panel believed that it is just a perception that the region lacks activities and attractions, or if the panel actually believe the region is actually lacking in this area. The mean score for the perception statement was 5.1, while the mean score for the actuality was 5.5, showing the panel believe it is an issue of perception.

The final weakness in this section is the perception of Auckland by other New Zealanders. Somewhat surprisingly, the statement designed to address this issue in the first part of the questionnaire; ‘New Zealanders outside of Auckland don’t want to travel to Auckland for MICE events’, had a third round mean score of 2.4, indicating the panel actually disagreed with this statement. Despite believing that there was not a problem with New Zealanders wanting to travel to Auckland for MICE events, a comment made in relation to another statement went some way to reinforcing that the domestic perception of Auckland is a weakness for the region. A representative of a CBD venue commented in relation to the Auckland having a range of activities but need to educate people that “There is still a sense of Auckland being arrogant”. In the second part of the questionnaire this perception was addressed through the statement ‘We need to find ways to make Auckland more attractive to other New Zealanders as a MICE destination”. The mean score from round three for this statement was 5.4, clearly indicating that the panel believes that there is room for improvement in how attractive other New Zealanders believe the region to be. This was further reinforced by a comment from a representative of a CBD hotel who rated the statement at seven. She said that “The rest of NZ has always put Auckland down and Auckland is meant to be the happening city, but it doesn’t show that”.

For the previously identified weakness of the lack of coordination and support at local/regional government levels, two statements were included in the first part of the questionnaire and one in the second part to confirm this as a weakness. In the first part the statements ‘There is a lack of understanding of the sector within government agencies’ and ‘Government agencies, including councils and the police, are inflexible in the application of policies’ had third round mean scores of 4.7 and 4.5 respectively. This shows that the panel agree that at a government level, the support for and understanding of the sector could be improved upon. The statement in the second part of the questionnaire ‘The super city will be good for tourism in Auckland. It will reduce the number of bodies involved and increase coordination for the industry’ had a mean score of 5.6. This shows quite a high level of belief amongst the panel that improved coordination is desired by the sector.

Table 8.6 – Weaknesses of Auckland as a MICE destination

Infrastructure	**Perception & marketing**	**Communication, collaboration & coordination**
No international standard convention centre	Perception that NZ is too far away	Lack of coordination & support at local/regional government levels
Lack of accommodation on-site/adjacent to many large venues	Lack of a unified compelling regional marketing message	Lack of collaboration between stakeholders
No means for recycling food scraps	Perception that Auckland lacks activities and attraction	Limited systems for sharing relevant feedback with other supply organisations
Lack of supporting infrastructure e.g. public transport, cruise ship terminal	Negative perception of Auckland by New Zealanders outside of Auckland	
Limited ICT infrastructure		

The limited systems for sharing relevant feedback with other supply organisations was addressed in the second part of the questionnaire by the statement ‘Finding ways to communicate and share information within the sector will ultimately help achieve a stronger MICE sector’. The mean score for this statement was six out of seven, showing that the panel believe there is work to be done in improving information sharing within the sector.

8.5.2 Opportunities and Challenges

As was the case for confirming of strengths and weaknesses, opportunities and challenges were also confirmed by the findings from the Delphi panel process. Again, a combination of the mean scores for particular statements and comments made by panel members were used to confirm each opportunity or challenge the sector was facing. Unlike the strengths and weaknesses however, all off the previously identified opportunities and challenges were assessed using the Delphi process findings. This section goes through each of the challenges and opportunities shown in table 8.7 in turn, and discusses the additional support that was found from the findings of the Delphi process.

The first of the challenges previously identified was coping with the current economic climate. Three statements were presented to the panel in relation to this challenge, two in part one and one in part two of the questionnaire. In the first part of the questionnaire panel members were asked to rate the level of truth of the statement; ‘Organisations have been tightening their belts when it comes to MICE events. There are less events being held and events are generally smaller, shorter and less extravagant than they used to be’. The mean score from round three for this statement was 4.6, indicating that the panel saw some truth in this statement. The second statement presented in part one of the questionnaire was ‘The economic climate has led to new business opportunities in markets that would not previously come to Auckland’. The mean score here was 4.7, showing the panel believed that although the economic climate was impacting the sector, it was not necessarily all in a bad way. The statement from the second part of the questionnaire was ‘A challenge for the sector is to get event organisers spending again’. This statement yielded an almost identical mean score to the other statement of 4.7. Based on these results in can be concluded that while the economic climate presents somewhat of a challenge for the sector, for the most part the sector is not overly concerned by this challenge.

The next challenge identified was coping with shorter lead times for MICE events. The Delphi process confirmed that lead times have become shorter through the mean score given of 6.5 for the statement ‘Lead times for events have reduced significantly in the past five years’. Although this statement does not specifically identify coping with shorter lead times as being a challenge, when combined with the interview findings it can confidently assumed that this is a challenge for the sector.

In regard to coping with competition from other destinations, three statements highlighted that this is indeed a challenge for the sector. The first of these statements was ‘Auckland needs an international standard convention centre to be able to compete with overseas destinations. This had a mean score of 5.9 in the third round, showing that the panel believed that this was the case. The other two statements: ‘We need to find a unique selling point we can use to attract MICE business to the region’; and ‘We need to find ways to make Auckland more attractive to other New Zealanders as a MICE destination’, had mean scores of 5.9 and 5.4. The scores for these statements showed the panel believed there were specific things that need to be done in order for Auckland attract business. The third statement also showed that the panel believed there is work to be done to overcome the negative perception of Auckland by other New Zealanders.

The next challenge that had been previously identified is managing the logistics of hosting the Rugby World Cup. This challenge was confirmed by the statement ‘Rugby World Cup 2011 will be a challenge for the MICE sector. It’s where a lot of the resources that are needed to host the event will come from and we don’t have enough resources.’ This statement received a mean score of 4.8, indicating the panel saw at least some truth in this statement. The comments made by two panel members further reinforce the view that managing the logistics of this event posed a challenge. The first comment from a CBD hotel representative was “Simply put – look at how Auckland roads and venues cope now, they don’t....you won’t be able to move!” and an audio visual supplier’s representative said “We lack experienced people with knowledge in large events”. These comments show that the concern stems not only from infrastructure related challenges but also in the human resources area.

Ensuring ongoing commitment to environmental initiatives is seen as a challenge for the sector that is, at least in part, mandated as necessary by national government policy. As discussed in chapter four of this thesis, the New Zealand Tourism Strategy places significant emphasis on environmental issues, and as a result this applies the need for all parts of the tourism industry to maintain a commitment to being environmentally friendly. So, although this challenge is in part put upon the sector, the findings from the Delphi process show the sector agrees with the importance of maintaining this commitment. The mean scores along with comments for two of the statements in the second part of the questionnaire show this to be the case. The first of these statements ‘We need to focus on becoming more environmentally friendly in the way we go about doing business’ had a mean score of 5.5 in the final round, showing the panel agrees that this is an important objective for the sector. The second statement ‘We need to encourage MICE event organisers to choose more environmentally friendly options' had a slightly lower mean score of 4.7. Although there was less support for the need to encourage organisers, the comment by a panel member representing an audio visual supplier show that this is in part due to increased cost of these options. His comment was 'Fine, but they won't pay any more (TRENZ as an example)'. On the other hand a PCO panel member commented "It is incumbent on the industry to take the lead", confirming that this is a challenge for the sector to overcome.

The final challenge that was identified for the sector is keeping up with advances in information and communication technology. This challenge is related to the previously identified weakness of limited ICT infrastructure in the region. Two statements in the second part of the questionnaire confirmed that keeping up with advances in this area is considered important for the sector and due to the limited infrastructure this is a challenge for the sector. The statement 'Auckland needs to improve our capability to deliver web based, real time content at events. To do this we need high speed broadband capability' had a mean score of 6.6 in the final round of the Delphi process, showing almost total agreement that this is the case. 'We need to ensure that we keep up with technological advancements and ensure that we are utilising new technologies in the events we hold in the Auckland region' achieved an even higher level of agreement with a final round score of 6.7.

Many of the opportunities identified as a result of the interview and survey findings were related to either overcoming weaknesses or capitalising on the strengths that had been identified in the region. The exception to this was the opportunity that Rugby World Cup 2011 presented to the region. RWC2011 was identified as an opportunity to showcase the region and demonstrate the region can host large events. As discussed earlier in this section managing the logistics associated with RWC2011 presented a significant challenge for the region, but if the region could rise to this challenge, the opportunity it presents certainly makes holding the event worthwhile. That RWC2011 presented the region with a great opportunity was confirmed by the Delphi panel. The statement ‘Rugby World Cup 2011 is a great opportunity for Auckland to show we can host large events’ received a mean score of 6.0 in the third round.

Two of the three opportunities that involve capitalising on strengths previously identified were confirmed through the comments made by panel members during the Delphi process. These two opportunities are capitalising on the clean green image of New Zealand and capitalising on the natural assets of the region. The comments from three venue representatives from different areas of the region show that there is a strong belief that the region’s natural assets and clean green image are important draw cards for the region to capitalise. A comment from a regional based hotel was “We are in an eco environment so strongly believe in promoting this concept” along with “We say we are 100% pure” from a suburban conference centre show this focus on the clean green image. A further comment from a CBD hotel representative was “Through the summer months is when we can beat the rest of NZ – this is our prime time because of the gulf”.

The third opportunity that arouse a result of capitalising on the strengths of the region is to increase participation in non event related activities. This opportunity was not directly confirmed by the Delphi panel. That said, the panel did confirm that there is a perception that the region lacks activities but that it is only a perception. With quite low levels of participation in other activities, particularly amongst other New Zealanders, there is certainly an opportunity to increase these levels.

The first of the opportunities targeted at overcoming current weaknesses is working together to promote the region and individual events. The panel almost completely agreed with the statement ‘We need to work together to market Auckland as an attractive MICE destination’, giving this statement a mean rating of 6.7 in the third Delphi round. Further support for working together to promote the region being an opportunity can be found in the comment from one panel member, a PCO, said “A unified sector is vital to compete with other destination within NZ and globally”.

The second opportunity to overcome a current weakness is to improve coordination within the sector. As was previously identified, prior to the introduction of the super city there were six local councils and the regional council all involved in the MICE sector. In addition, national government services such as the police also played a role in the coordination and staging of events held in the region. The Delphi panel showed that the number of bodies involved in coordination and marketing, along with some lack of flexibility and understanding of the sector has been a weakness for the region. The second part of the questionnaire presented the panel with the statement ‘The super city will be good for tourism in Auckland. It will reduce the number of bodies involved and increase coordination for the industry’. This statement had a final round mean score of 5.6, showing that by and large the panel agree this was believed to be true. A comment from a panel member representing a large CBD venue was “I think it will streamline tourism bodies; make it more cost effective, and hopefully increase the pool of dollars”, further reinforced this view.

The final opportunity that was identified is the construction of a purpose built international standard convention centre in the region. The mean score for the statement ‘Auckland needs an international standard convention centre to compete with overseas destinations’ was 5.9.

This shows that the panel agrees that the construction of such a centre would improve the competitiveness of the region. Given that, as discussed in chapter two of this thesis, it appears that a new centre will be constructed in the region, this certainly presents the region with an opportunity.

Table 8.7 – Opportunities and Challenges for the Auckland MICE sector

Challenges	*Opportunities*
Coping with the economic climate	Working together to promote the region and individual events
Adjusting to shorter lead times	Improved coordination following the introduction of the Auckland Super City
Coping with competition from other destinations	Construction of a international standard convention centre
Overcoming negative perceptions of Auckland by other New Zealanders	Capitalising on clean green image of New Zealand
Managing the logistics of hosting Rugby World Cup 2011	Capitalising on natural assets of the region
Ensuring ongoing commitment to environmental initiatives	Capitalising on Rugby World Cup 2011 as a means to showcase the region and show that the region can host large events
Keeping up with advances in information and communication technology	Increasing participation in non event activities in the region

8.6 Development of a Strategy

Throughout the course of the earlier interview process, many of the interviewees made comments that they felt strongly that the sector needed a strategy to be developed. In most instances this was not during the actual formal interview and as such was not included in the interview transcripts. In several cases, these comments were made as early as during the initial telephone contact to arrange the interviews. As the exact comments were not recorded, it was necessary to find another way to determine if there is in fact support for further development of the sector amongst suppliers and venues. Therefore, the final statement posed to Delphi panel members in the questionnaire was 'Developing the MICE sector should be a priority for the region'. The mean score for this statement in round three was 6.4, clearly showing the panel felt that this was the case. Two comments by panel members reinforce this support: "Business tourism/MICE delegates spend 3 times as much as the standard visitor arrival. Developing the MICE sector should be a priority' (Large CBD venue representative); and "Very keen to contribute to positive change for the growth and expansion of MICE in Auckland" (Coach transport provider).

8.7 Conclusion

The focus of this chapter has been on the final stage of the data collection for this research project. This part of the project differed from the previous stages, as the focus was not on uncovering new information, but rather on consolidating the data previously gathered, in order to move forward in the process of assisting in the development of a strategy for the Auckland MICE sector. The method used in this phase was the Delphi technique. This technique was used for two purposes; firstly to assess and build upon the level of consensus regarding the issues the Auckland MICE sector is facing; and secondly to develop a final set of current strengths and weaknesses, and future opportunities and challenges. This information is then used to make recommendations to Tourism Auckland regarding the contents that should be included in a strategy document for the sector. These recommendations form the basis for the next chapter in this thesis.

Overall the Delphi technique was successful in the achievement of both purposes for which it was employed. The Delphi questionnaire presented the 13 panel members with a series of statements over three rounds. The panel rated these statements on how true they believed the statement to be and in rounds two and three had the opportunity to review their rating based on knowing the mean score for each statement from the previous round. It was anticipated that there would be some convergence of the scores by the end of round three. The level of consensus regarding the truth of each statement was assessed after each round and as anticipated the number of statements where consensus was achieved increased after each round. Of the 36 statements presented, only three did not meet the threshold were consensus was deemed to be achieved, clearly showing the technique was successful in this purpose.

The second purpose of the Delphi technique process was to finalise the situational analysis for the sector. This was done by taking the previously identified strengths, weaknesses, opportunities and challenges and transforming them into the statements that then made up the Delphi questionnaire. The mean scores for each statement were then used along with comments made by panel members to confirm each factor. The Delphi process was also successful in this purpose, with the previously identified factors being confirmed as correct by the panel. In addition the findings confirmed there is a clear desire amongst supply side stakeholders for further development of the sector to occur.

The final chapter of this thesis takes these findings and uses them to for two purposes. The first purpose is to achieve the pragmatic objectives of this project, being to facilitate the development of strategic planning for the Auckland MICE sector. This involves reporting Tourism Auckland on these findings, making recommendations regarding content of a strategy document, as well as further necessary research and consultation. The second purpose of the next chapter is to propose and outline the framework that has been developed as a result of this research for conducting strategic planning in the MICE sector.

Chapter 9 – Discussion and Recommendations

9.1 Introduction

There is an ever growing body of literature regarding the MICE sector. This literature has explored a great range of aspects of the MICE sector including issues related to supply and demand (e.g. Bramwell, 2011; Clark, Price, & Murrmann, 1996; Crouch & Louviere, 2004; Fjelstul et al., 2009; Hinkin & Tracey, 2003b; Ogden & McCorriston, 2007; Park & Boo; Rogers, 2003; Strick et al., 1993), roles and functioning of organisations in the sector (e.g. Gartrell, 1991b; Getz et al., 1998; Joyce, 1996; Lee & Lee, 2006; Shock & Stefanelli, 2001; Smith & Garnham, 2006; Weber, 2000), economic contribution of the sector (e.g. Larry Dwyer et al., 2007) and issues related to design of MICE venues (Clark, 2006; Fenich, 1992; Lawson, 2000). While wide ranging in the topics and perspectives that have been addressed, the vast majority of this research has been centred in North America and Europe (e.g. Chacko & Fenich, 2000; Jun & McCleary, 1999; Kim & Park, 2009; Mair & Thompson, 2009; Robinson & Callan, 2005). More recently northern Asian markets have begun to be the focus for researchers and some additional research has also been conducted in Australia (e.g. Deery et al., 2005; Wan, 2011; Yoo, 2004). What is missing in the literature is research that has been conducted in a New Zealand context. This lack of research in a New Zealand context is where this thesis makes a significant contribution to the existing body of literature.

This final and concluding chapter begins by reviewing the research objectives that were set for this thesis. This is followed by a discussion addressing the desire for development of the MICE sector in the Auckland region. Specifically the key findings regarding the desired future direction are explored. This discussion includes reference to the proposed construction of a new international standard convention centre in the region and the dichotomy of views regarding this development.

The second part of this chapter then explores the current state of the region's MICE sector. This section describes the findings in relation to the structure of the sector, and the roles of individual stakeholders in the sector. This is followed by an examination of the current strengths and weaknesses of the sector that were uncovered during the course of this research. More specifically the dysfunctional state of Auckland's MICE network is explored and how this is contributing to the weaknesses of the sector in its current state.

A discussion of the difficulties encountered during the course of this research and the limitations these placed on the researcher makes up the next section of this chapter. This is then followed by a summary of the opportunities and challenges that were identified for the sector in the next five to ten years. It may at first glance it seems unusual to have the limitations of this research addressed prior to identifying opportunities and challenges. However, this has been done intentionally as some of the opportunities and challenges identified during this research were a direct result of the difficulties encountered by the researcher.

The final section of this chapter outlines the recommendations that the researcher would make to Auckland Tourism, Events and Economic Development Ltd as a result of this research. These recommendations include the need for development of a strategy for the sector, as well as proposing a framework by which such a strategy could be developed and implemented. Finally the author provides some concluding comments regarding the future of the MICE sector in the Auckland region.

9.2 Reviewing the Research Objectives

The motives for undertaking this thesis were two-fold. The first motive was for the author to earn her Doctor of Philosophy degree. This requires the thesis to make a significant and original contribution to the literature regarding the topic. This thesis applies stakeholder and network theories to explain the complexities of the MICE sector in the Auckland region and to develop a case for why strategic planning should be conducted in the sector. This is a unique contribution to the literature as stakeholder network theory has not previously been used to explain the complexities of the tourism industry in the Auckland region, and nor have these theories been applied specifically to the MICE sector. In addition until now, network and stakeholder theory have primarily been used in two ways. The first is retrospectively to policy and planning processes to explain process and outcomes, while the second is early in the planning process to identify stakeholders. Stakeholder and network theory has not previously been used to develop a case for conducting strategic planning.

The second motive for undertaking this particular research was to provide a practical contribution to the development of the sector in New Zealand generally and Auckland specifically. Underlying these goals were three key research questions:

1. Who are the key stakeholders in the Auckland MICE sector, and what are their goals and objectives?
2. How are they contributing to shaping the future of the sector?
3. How can the implementation of strategic planning and management assist the sector in achieving 'industry best practice' sustainable development?

Accordingly the specific objectives for this research were defined as:

8. To develop a clear understanding of the current state of the Meetings, Incentives, Conventions and Exhibitions (MICE) sector in the Auckland region, including who the key stakeholders are, what roles these stakeholders are playing and the nature of the relationships and power structures that exist in the sector.
9. To understand trends occurring in the sector from both the supply and demand perspectives.
10. To enhance understanding of the link between strategic planning and sustainability.
11. To forecast the likely development of the sector with reference to Auckland.
12. To identify aspects of the sector that requires further development in order to meet demand.
13. To assess if a consensus exists within the sector as to whether a strategic approach to development is required in order to maximise opportunities and ensure long term sustainability.
14. To propose a planning and management structure that allows for on-going strategic development of the sector based on the data gathered from various stakeholders.

The remaining parts of this chapter explore the key findings in relation to these objectives and highlights how these findings can be utilised in developing a strong robust MICE sector in the Auckland region. The next section of this chapter looks at what is the desired future for the region's MICE sector. This is then followed by the current state of the sector and the issues and challenges that the sector will need to address if they are to achieve this desired future.

9.3 The Desired Future

At the time of commencing this research, the desire by some parties to develop the MICE sector in the Auckland region was beginning to become apparent. The call for a further large purpose built convention centre was first raised in 2005 by the then Auckland City Mayor Dick Hubbard with Allan Trotter, CEO of CINZ supporting in his call (CINZ, 2005). This proposal was then considered, with discussions being held regarding the value of such a facility (Tourism Auckland, 2007a). The result of these discussions was a detailed feasibility study conducted by Auckland City Council in partnership with the Ministry of Economic Development. A report based on this feasibility study, released in September 2009, concluded that a purpose built international standard convention centre capable of hosting at least 3500 delegates should be constructed in the Auckland region (Auckland City Council & Ministry of Economic Development, 2009). This resulted in a call for expressions of interest for a potential site for such a centre being issued in May 2010, with submissions being made in June 2010 (Hanlan, Fuller, & Wilde, 2006).

Subsequently in the following year the New Zealand government announced it had entered into negotiations with Sky City Ltd for the construction of such a centre in the Auckland CBD adjacent to the existing Sky City site (Wray, 2011). It has been forecast that the new centre will attract an additional 33,000 MICE international MICE delegates every year and create 1000 new jobs during construction and 800 jobs once fully operational (Ruhanen, 2010). It is estimated the proposed centre will cost around $350 million to construct, all of which will be funded by Sky City. In return Sky City have asked the government to review some gambling legislation and regulations (Wray, 2011). This request in itself has caused considerable controversy in the New Zealand media with headlines such "Gambling law under threat in SkyCity Deal" (Pansari, 2006), "Key too quick to move Sky's limit" (Johannesson, 2005) and "NZ's laws 'for sale'" (Pansari, 2006) appearing in newspapers across the country. In spite of this controversy regarding how the convention centre is to be funded, it is clear that the government's position is that this is the way forward for the MICE sector in New Zealand generally and the Auckland region more specifically.

Interestingly, neither the Auckland Council, nor ATEED have released any official press statements in regard to the New Zealand government's announcement. However one newspaper, the Dominion Post, cited Auckland Mayor Len Brown as having said "The facility is something Auckland urgently needs if it is to become an events capital, a destination rather than a gateway, and is able to compete with Australian cities for international conferences. I am aware that there were five strong candidates. Auckland Council did not have a role in the selection process" (Hunter, 2011, p. C3). A further article in the New Zealand Herald indicated that while the mayor had not previously supported the Sky City proposal he was pleased by the government's announcement (New Zealand Herald, 2011). These articles point to the Auckland Council also seeing the construction of a new convention centre as the way forward for the region. This has been further confirmed by the inclusion of *"Support the development of a national convention centre and ensure its full integration with associated value chain in Auckland and New Zealand"* (Auckland Council, 2011d, p. 94) as an initial action in the Draft Economic Development Strategy released in April 2011.

Perhaps the most significant finding of this thesis has been in relation to the dichotomy of views that exist in relation to the future of the Auckland region, and the tension between desired outcomes and the pragmatic realities that the region faces. It is clear that both the New Zealand government and the Auckland council are in support of the construction of an international standard convention centre in a bid to dramatically increase the amount of international MICE visitation to New Zealand and the Auckland region. This research found that there are certainly some stakeholders on the supply side of the sector that are in agreement with this stance. Specifically these stakeholders were primarily the PCO's that were interviewed, along with representatives of many of the CBD hotels. The reasons cited by these two groups were quite different. The PCO's were focussed on the ability of the region to host the events that they organise, while the hotels were shown to have more concern for the benefits for the region as a whole. One of these hotel representatives said "We need a big convention centre to really be able to compete with other places like Melbourne, and bringing a couple of thousand people for a conference - well that just fills the city doesn't it and that's good for everyone" and another said "What Auckland is lacking is a proper convention centre, it would just open up so many doors internationally for the region.............this would just be so good for the region".

In contrast to this view that the region needs an international convention centre there are a number of stakeholders, representing mostly suppliers in the sector, who do not think that a convention centre is the answer to developing the MICE sector in the region. Amongst the reasons cited for this view point is the physical distance of New Zealand from the major MICE generating markets. The concern arising from this geographical factor is that the costs, both financial and environmental, of holding an event in New Zealand are too great for the region to every truly be competitive in an international sense. This concern is then further validated by the current economic climate, ever increasing fuel prices and global concern for environmental issues, including global warming. If this is indeed the case then a new convention centre is not an economically viable proposition. Further support for this contention that such a centre is not economically viable can be found in the agreement between the New Zealand government and Sky City regarding the review of gambling legislation as previously discussed in this section. It can be argued that if the centre itself was a viable economic proposition, then Sky City would not have the need to request review of gambling legislation with the objective of it being permitted to install several hundreds of additional ‘pokies’.

This research also found there are a group of stakeholders in the sector who are currently ‘sitting on the fence’ or in other words are not convinced either way on the need for a convention centre in the region. This was evident throughout the interviews with a representative of a suburban hotel saying “I just don’t know if we need it, really how many conferences are that big” while a representative of a catering company said “I’m on the fence about that one, we already have some pretty big venues”. Further evidence that there are some stakeholders that are unsure about the need for a national convention centre can be found in the scores from the Delphi panel in relation to the statement ‘Auckland misses out on business due to not having a large enough venue’. In the third and final round two of the panel members gave this statement a neutral score with one scoring it at 3.5 and the other 4, indicating they neither agreed nor disagreed with the statement.

Given this lack of consensus regarding the need for a new convention centre in the region, it can be safely said that there is a lack of consensus regarding the desired future for the Auckland MICE sector. This finding is of particular significance due to the importance of defining a desired future position for developing plans and strategies. Any strategies and plans that are developed are by their very nature designed to assist in achieving the desired future position.

Further to this dichotomy of views regarding the need for the convention centre, it is apparent that the National Government is determined to go ahead with the Sky City deal, despite considerable opposition. In addition, the Auditor-General launched an investigation in June 2012, into the process the government used to select Sky City for negotiations. Despite this, at the time of writing (August 2012) negotiations between the Government and Sky City continue and Prime Minister John Key has not ruled out signing an agreement before the investigation is concluded (Levy & Hartevelt, 2012). This clearly demonstrates that there are considerable power imbalances within the extended Auckland MICE sector, with two dominant stakeholders, Sky City and the Government, making the decisions regarding the future of the sector. This will be discussed further in the following section of this chapter.

Despite the lack of consensus regarding the desired future position of Auckland's MICE sector, this research found that there is a clear desire to develop the sector. As discussed in chapter seven of this thesis, many of the interviewees made comments regarding how pleased they were that this research was being conducted. This was further supported by the findings from the Delphi process. The final statement in the Delphi questionnaire was 'Developing the MICE sector should be a priority for the region'. Round three of the Delphi process saw this statement receive a mean score of 6.4, with a standard deviation of 0.53. This clearly shows that the panel members believed this statement to be true.

Although the desired future position is not clear, there is a desire to see the sector become a priority for the region, and as such be further developed. The next section of this chapter examines the key findings of this research in terms of the current position of the sector and the issues and trends that are impacting on the sector.

Current state of the MICE sector

9.4.1 Stakeholders, Roles and Influence

The first objective defined for this research was to develop a clear understanding of the current state of the MICE sector in the Auckland region. This involved first developing a clear understanding of the various stakeholders involved in the sector and the roles and activities of these various stakeholders. This required not only the identification of the key stakeholders, but also an understanding of how and why various stakeholders or indeed groups of stakeholders are currently shaping the Auckland MICE sector. Stakeholder theory, as discussed in chapter three of this thesis, is concerned with the identification, classification and management of stakeholders. This section of the thesis explores the sector from a stakeholder theory perspective in order to paint a picture of the current state of the sector.

Chapter four of this thesis reviewed the literature regarding the structure and components of the MICE sector. Resulting from this was the creation of the framework for the data collection in the first phase of this research. At that stage of the research the stakeholders were simply divided into supply side and demand side categories. During the course of the research it became apparent that just categorising stakeholders as either supply or demand side did not adequately show the complexities of the sector both in terms of roles of stakeholders, and the communication channels within the sector.

The Auckland region's MICE product is a combination of tangible and intangible elements resulting from the goods and services provided by those stakeholders on the supply side of the sector. This product is essentially consumed by two groups: those that organise and manage MICE events; and those that attend MICE events, either as delegates or as exhibitors. While this is not new information, what this research has uncovered is who is involved in developing, marketing and delivering Auckland's MICE product to these two groups of consumers. Figure 9.1 shows a representation of the roles of the various components that make up the Auckland MICE product and the communication that occurs between each of the components.

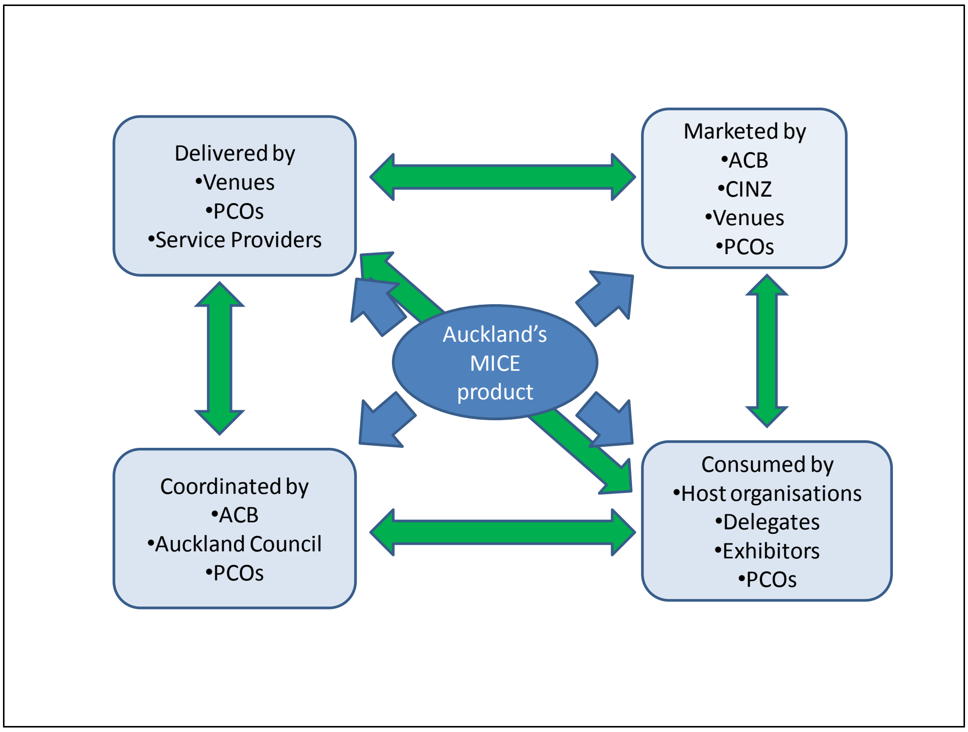


Figure 9.1 – Auckland's MICE Sector

As can be seen in figure 9.1, two additional functions have been added since the initial supply and demand side model identification of stakeholders was generated. The first of these functions is the marketing of Auckland's MICE product. This thesis has brought to light the intricacies of this function in the region. The way this thesis has done this is by identifying the numerous bodies that are involved in this function, and the contributions of these various bodies to the marketing of the region. In chapter four of this thesis it was identified that one of the main bodies involved in marketing a destinations MICE product is the destination's convention bureau. Ten key roles for convention bureaux to undertake in this respect were also identified (Wang, 2008). In the Auckland region, it is the Auckland Convention Bureau (formerly Business Tourism Auckland), who is tasked with marketing Auckland as a MICE destination. However, despite the Auckland Convention Bureau being specifically tasked with marketing the region, there are numerous other bodies also performing this function. As will be discussed later in this chapter, this has resulted in a myriad of messages being sent to potential consumers, and is a weakness of the MICE sector in its current state.

Another of the roles for convention bureaus to perform, as identified by Wang (2008), is to act as an industry coordinator. As with the marketing function, this research found that it was not only ACB that was performing this role. Certainly ACB did perform this role to some extent, particularly through the coordination of bids for hosting of events and the regions participation in tradeshows. However, other bodies also performed in coordination roles. An example of this is that the various local councils that were in existence at the time coordinated any consent processes that were required for events and for the development of, and construction of venues.

In addition to identifying stakeholders based on the roles that they perform it is also necessary to examine why stakeholders perform these roles and to what extent their performance of these roles is influencing the sector as a whole. This can be largely explained based on the legitimacy of the stakeholder's interest in the MICE sector, and power that they hold.

Examining stakeholders on the basis of power and the legitimacy of their interest in the MICE sector provides a useful starting point for examining the role that the National Government has been playing in setting the future direction for the sector. As was discussed in Chapter 3 of this thesis, legitimate interests may take different forms. First, there are those with specific economic interests as either generators of demand or as commercial suppliers of resources.

Second, there are those with planning responsibilities. Within New Zealand, these are public sector or governmental policies. This sector also has a pecuniary interest in that the sector is often engaged in investment directed to the enhancement of city or regional resources that benefit residents and private sector business interests. Such investment is generally justified in terms of generating income and employment which can also aid local government revenue derived from rates. Third, those who pay rates also possess an interest as they may effectively being paying taxes that add to their own costs, yet may not receive any direct economic return. Fourth there may be various interest groups concerned with wider social issues, such as, in this case groups concerned with gambling problems. Fifth, competing business interests who fear direct or indirect competition. Existing venue operators may not wish for more competition, while others may simply not wish to see public sector funds directed away from their own interests. This classification thus extends across a range from close, intimate contacts with an initial proposal to those quite distant from that proposal. Equally there are also others who would see themselves as having an interest, whether simply residents fearing more congestion and noise, to others inside and outside the tourism industry in other parts of the country. Stakeholders are those bound by strong and weak links across spatial, business and social contexts. The government might be said to be both a referee and a player in this process as it both legislates and implements policies.

9.4.2 Strengths and Weaknesses of the Sector

One of the key findings of this research was the existence of some areas of weaknesses in the marketing of the Auckland region as a MICE destination. As discussed in chapter three of this thesis there is more than one type of consumer of the MICE product and accordingly there is more than one group that the region needs to be marketed to as a MICE destination. The first of these groups is the MICE event organiser. Without the organiser selecting the region to host the event, there is little point in marketing to potential attendees or delegates. Within the supply side of the sector, there is a general consensus that there is room for improvement in the way the region is marketed to these event organisers.

The first of the two main areas in which this research found gaps in the marketing function is the lack of collaboration between stakeholders. This weakness of the region became evident early in the data collection process, with many interviewees identifying this as an issue for the region. Outside of the tenders coordinated by the Auckland Convention Bureau or CINZ, not one venue representative identified that they had partnered with another organisation in marketing their product to the MICE market. In fact one venue representative, from a suburban hotel in comparing Auckland with Rotorua said “They just work so well together and we here in Auckland just don’t. You just don’t see that here.” A representative of an a/v supplier provided some insight into why this may be the case when he said “Nobody really talks to each other, even when there is a get together at CINZ, it’s really just a nice chance to drink some wine. Everyone is so scared they might give something away.” This comment alluded to the fierce levels of competition between businesses in the sector as being an underlying cause of the lack of collaboration currently occurring within the region.

This intense level of competition between venues and other supply side organisations was also raised in other ways. This was in relation to the response to the economic climate and the amount of undercutting that was occurring in the sector. In fact eight of the thirty venue representatives made specific mention of the amount of undercutting that has been occurring in the region. The respondents also noted that this undercutting was not good for the region as a whole with comments made such as “It’s no good for anyone really, no-one is making any money” (CBD hotel representative), “Price fixing would be a great thing for our industry, but hey that's illegal" (suburban hotel representative) and "I just don't see how they are making a profit at those rates" (CBD hotel representative) illustrating this point.

Aside from the lack of collaboration between stakeholders in the promoting of Auckland as a MICE destination, this research also found a weakness in the region in terms of the lack of a unique selling proposition and brand for the region's MICE product. As was discussed in chapter three of this thesis, there is ever increasing competition between destinations to secure lucrative MICE business (Chen, 2006; Morla & Ladkin, 2007; Ryan et al., 2007; Weber & Ladkin, 2004). In the face of this increasing competition, many destinations are seeking to differentiate themselves through creating a unique destination brand (Cook & Whitmeyer, 1992b; Gao, 2005; Oral & Whitfield, 2010).

Within New Zealand, Wellington is one example of a city that has created a unique brand. They have positioned themselves as a hub for the creative industries. This branding is evident as soon as you enter the Positively Wellington website with the main heading reading "Wellington – New Zealand's Capital of Cool" (Positively Wellington Tourism, 2011a), while their convention's web pages provide a specific reasons as to why MICE event organisers should choose Wellington, including its being a cultural hub (Positively Wellington Tourism, 2011b). Evidence of the use of branding can also be found in the Australian cities of Brisbane and Melbourne. Brisbane promotes itself as being Australia's new world city and a hub of innovation, particularly in the areas of medical research, information and communication technology, and creative industries (Brisbane Marketing, 2011). Melbourne on the other hand promotes itself on the basis of being one of the world's best cities and as having the best conferencing facilities, the best convention bureau and being the most convenient city in Australia to hold a MICE event (Melbourne Convention and

Visitors Bureau, 2011). Further afield Singapore uses the tag line “Something at every turn: Asia’s Convention City” (Suntec Singapore, 2011) as part of their branding to attract MICE business.

Throughout the course of the interviews conducted in this research it became apparent that a number of stakeholders felt that a unique and distinctive brand was missing from the promotion of Auckland as a MICE destination. This came through in comments such as “Like sure all our stands have the same logo, but really compared to other regions we just stay plain and boring” from a CBD hotel representative in regard to the regions presence at the tradeshow *Meetings* and “I don’t think we do a good job of promoting Auckland as place to come have your conference. Auckland seems to be just the place you pass through to get to more exciting places” from a multipurpose venue located just outside of the CBD. This finding was further reinforced by the results of the Delphi process. In the Delphi questionnaire respondents were asked to rate the level of truth of the statement “We need to find a unique selling point that we can use to attract MICE business to the region”. In the third and final round this statement received a mean score of 5.9 out of a possible seven, indicating the panel believe there is considerable truth in the statement.

The coordination function shown in figure 9.1 identifies local government, the Auckland Council, as playing a key role in the MICE sector. During the interview phase of this research, two supplier organisations provided specific examples of situations where local government bodies had made it significantly more difficult to their jobs effectively. One situation was in relation to refusal to allow coaches to stop to allow passengers on and off outside a venue, instead directing them to use a bus stop 100m up on the other side of the road. The second example was the introduction of an additional consent process and fee for the construction of exhibition stands. In both cases the interviewees felt these issues were the result of a lack of understanding of how the sector works and lack of support for the sector from within the council. To assess if this feeling was mirrored by others in the sector two statements were included in the Delphi questionnaire. The first of these statements ‘There is a lack of understanding of the sector within government agencies’ received a third round mean score of 4.7. The second statement ‘Government agencies, including councils and the police, are inflexible in the application of policies’ received a mean score of 4.5 in the third round. Although these scores do not indicate that there is a high level of concern for these statements, it is also interesting to note that the lowest score given by panel members to either of these statements was 4. This shows that all of the panel members saw at least some truth in these statements in that there was no inherent predisposition to disagree with the contention.

There has been a significant change in the governance structure of the region since this data collection took place and to this has resulted in functions that were previously the responsibility of a number of bodies at local and regional council being merged under the sole responsibility of ATEED. While this change in governance structure may have to some extent alleviated some of these previously expressed concerns, the functioning of ATEED has also been problematic. In the less than two years that ATEED has existed, three individuals have acted in the role of CEO. ATEED has also been through a significant restructure from its original form. This raises significant questions regarding the effectiveness of the functioning of the organisation. Further evidence of some degree of ineffectiveness of ATEED can also be found during RWC2011. ATEED was tasked with managing this event within the Auckland region. Significant issues occurred during the first game of the tournament, including failure of the Auckland public transport system and overcrowding at the waterfront ‘Fan Zone’. This resulted in the National government, under the direction of RWC Minister, Murray McCully, taking over control of the ‘Fan Zones’ in the Auckland region (Davison & Trevett, 2011). The circumstances surrounding the resignation of former CEO, Mr Redman, also raises questions regarding the credibility of the organisation and its strategic direction. While the incumbent CEO, Brett O’Riley has only been in the position for three months at the time of writing, the strategic direction of ATEED and its focus on major events seems to be unchanged.

In addition to defining the roles performed by the various stakeholders involved in the Auckland MICE sector, this research also examined the communication channels that exist between the various stakeholders. In terms of individual events the communication channels in place are by and large well established and effective. Venues and suppliers communicate effectively to deliver events, and feedback processes are in place to receive, action and monitor feedback from delegates and event organisers. The fact that the delegate survey achieved a mean score of 6.18 out of a possible seven for satisfaction with the organisation of the event clearly shows that these communication systems are working well and is a strength of the sector.

Of concern however, for the sector, are the broader communication channels that allow for information sharing and collaboration. As previously discussed, there is intense competition between various stakeholders within the region. This competition, combined with the fact that many interviewees stated that they tend to get caught up in everyday work, has resulted in there being very little information sharing between stakeholders. This was recognised as an issue by several interviewees with two suppliers and three venue representatives stating that they would like to see regular MICE specific ‘get togethers’ or update sessions. This was further corroborated by the findings from the Delphi study. In the final round the statement ‘Finding ways to communicate and share information within the sector will ultimately help achieve a stronger MICE sector' received a mean score of 6 out of a possible 7. This shows that the panel believe that communication and information sharing is important for the future success of the sector. As will be discussed in further detail later in the chapter, despite this acknowledgement of the importance of information sharing, there are still considerable sources of resistance preventing it from actually occurring. This is an issue that needs to be addressed moving forward, and the recommendations made to ATEED at the end of this chapter address this issue.

From a network theory perspective the weaknesses that have thus far been discussed show significant dysfunction exists within the Auckland MICE sector. As was discussed in Chapter 3 of this thesis for a network to operate effectively to manage and market a destination, roles need to be clearly defined, their needs to be effective communication channels and collaboration must occur (Dredge, 2006a, 2006b; Wilkinson & March, 2008). As has been shown in the previous discussion, this is not the case in the Auckland region. Power imbalances, poor definition of roles, lack of communication and collaboration are all evident in the functioning of the Auckland MICE sector.

The weaknesses of the sector that have thus far been described have stemmed from what can be termed dysfunctions of the Auckland MICE sector network. This research also identified another area of weakness for the sector, and that is in terms of the supporting infrastructure. In discussing the desired future position of the sector, it was identified that there is a significant portion of the sector that holds views in line with that of the government as to where Auckland should be in the future. If this view is to be the future of Auckland, then improvements are required for the city's infrastructure. Specifically the region will need the purpose built international standard convention centre that is set to be constructed by Sky City, however this research also identified other areas that need improvement. Two areas commonly identified by interviewees were public transport and broadband capability. Three venues identified public transport in the region as requiring development. They mentioned factors including unreliable transport into the CBD contributing to congestion on the roads, namely that it is difficult to get around the city, which is off putting for visitors and the fact that compared to other cities such as Brisbane and Sydney, Auckland is a long way behind in this respect. The need to increase the region's broadband capability was an issue that was highlighted by representatives of an audio/visual supplier during their interview. This issue was put to the Delphi panel in the form of the statement 'Auckland needs to improve our capability to deliver web based, real time content at events. To do this we need high speed broadband capability'. The panel overwhelmingly agreed with this statement scoring it 6.6 in the final round. While not directly related to the MICE sector an additional infrastructure requirement is the need for a proper cruise ship terminal and this was identified through this research. Two venues and a representative of a coach transport provider recognised this need. The concern over the current terminal is that the current terminal provides passengers with a negative image of the region as their first impression.

Since the data collection period of this research, a number of these concerns regarding infrastructural inadequacies have been recognised by the Auckland Mayor, Len Brown and the Auckland Council. In fact both:

> *"Deliver an integrated transport system, with emphasis on facilitating the following key transport projects: City Rail Link, completing the Western Ring Route, activating Auckland's harbour through an effective ferry network, improving regional freight routes, improving rapid transit and airport connections, additional harbour crossing and improvements to inter-regional connections"* (Auckland Council, 2011d, p. 49),

and

> *"Implement and support programmes which increase the level of uptake, demand and economic opportunities offered by ultrafast broadband"* (Auckland Council, 2011d, p. 50),

are included as initial actions for completion in the next ten years in the recently released Draft Economic Development Strategy. So while they can still be considered weaknesses at this time, plans are certainly being developed to address these weaknesses.

While the sector certainly has some weaknesses, they are primarily related to the roles of various stakeholders, and the ways in which these roles are performed. This is a positive for the region, as it is possible to change the situation. In addition, this research found that the Auckland MICE sector has a number of strengths on which it can capitalise in order to further develop the sector. Perhaps the most prominent of these strengths is the range of natural and built environments within the region. This range of different environments is not only appealing scenically, but also means the region boasts a great range of activities. Visitors can engage in all the activities commonly associated with urban tourism, such as shopping, the performing arts and dining. In addition they can engage in an almost endless number of other activities ranging from adventure activities to vinery tours and harbour cruises. This diversity is a definite strength of the region.

Another strength of the region is the range of venues, accommodation and MICE services that are available in the region. Chapter three of this thesis examined event organisers' destination selection processes. There have been numerous studies conducted on this topic (e.g. Chen, 2006; Hankinson, 2005; Oppermann, 1996; Toh et al., 2007) and although there were some differences between the findings in each study, venue and accommodation factors were identified as very important to event organisers. The findings of this research also support venue and accommodation as being important factors for organisers when deciding where to host events. Both of the event management companies interviewed highlighted the importance of the using the right venue for the client, while the event organisers who participated in the questionnaire survey identified the suitability of the venue as the most important factor in their decision making process. The audit of venues and MICE suppliers in the region revealed the region as a range of options available for organisers to choose from and this is therefore an important strength to recognise.

A further factor, identified from previous studies as being considered important by MICE event organisers is the accessibility of the destination (Chen, 2006; Hankinson, 2005; Oppermann, 1996; Toh et al., 2007). This is a definite strength of the region. Auckland International Airport is the major hub airport in New Zealand and is serviced by over 20 international airlines as well as catering to the domestic market (Auckland International Airport, 2011). In addition, the region is serviced by coach and rail services, and as the largest city in New Zealand is well connected via road (Auckland Tourism Events and Economic Development Ltd, 2011c).

9.4.3 Trends and Issues Affecting the Sector

The second objective of this research was to understand the trends and issues that are currently affecting the Auckland MICE sector. The first issue that almost all interviewees mentioned when questioned regarding current issues was the economic climate. The global economic crisis of 2008 had and continues to have up to the date of these thesis (2012) a significant impact on the MICE sector – an impact that unfortunately was only alleviated in part due to the loss of conference facilities in Christchurch because of the earthquakes of 2010 and 2011. Evidence from overseas reported significant numbers of events being cancelled (Gecker & Hall, 2009) and companies cutting back on event spending and employee training (Phillips, 2009). This research confirmed that this was also an issue affecting the Auckland region's MICE sector. Most of the venue representatives reported a decline in the amount of MICE business following the 2008 global economic crisis. Venues reported fewer events being held, and those that were held being shorter, smaller in number of attendees, and in many cases selecting cheaper options for catering and other extras such as audio/visual technologies.

A trend that this research found was towards shorter lead times in planning of MICE events. This trend was reported by eleven of the venue representatives and two supplier representatives during the interview phase of this research. This was then later confirmed by the Delphi panel. The statement "Lead times for events have reduced significantly in the past 5 years" received a third round mean score of 6.5, showing that the panel believe this statement to be almost 100% true. This trend is not unique to the Auckland region, Weber and Ladkin (2004) found the same trend occurring in both the United Kingdom and Australia. They attributed this trend in part to be the result of the availability of online information gathering and booking. This was also thought to be a factor in the Auckland region with the statement 'The internet has changed the way people investigate and book travel. This has impacted on the MICE sector, especially regarding accommodation bookings' received a third round mean score of 6.15. A further contributing factor found by this research was the economic climate as just noted. This is demonstrated by quotes such as:

> *"People are just putting it off and putting it off, and then it's like oh, we really do need this meeting. So then it's like all last minute to try and organise it"*
>
> CBD Hotel Representative

and

> *We got a booking yesterday for a 100pax meeting next week. It's not normally so short notice but we have seen quite a bit of this since the recession started"*
>
> Suburban Hotel Representative

A second global trend that this research confirmed as also occurring in the Auckland region is the increased emphasis on environmental concerns in the planning and management of MICE events. Almost of the venues and supplier who participated in this study had in place or were in the process of implementing environmentally friendly initiatives. The exceptions were the smaller of the two catering companies and the labour hire firm. In both cases they felt that within their own businesses there was not much they could do, but they made sure that when working at on site at a venue they complied with all initiatives in place at that venue. When questioned about why they were pursuing environmentally friendly options participants gave one of two responses, or in some case both responses. The first of these responses was that it made financial sense to have the initiatives in place. Two case studies of MICE venues in the Auckland region available via the Energy Efficiency and Conservation Authority provide evidence that energy efficiency can save provide substantial cost savings to businesses. In one case study Sky City Auckland has achieved a reduction in their lighting costs of over 50% (EECA Business, 2010b) while the second case study outlined that the results of a recent audit of the Novotel Hotel, Ellerslie that showed the hotel could save 15% of its total energy bill by implementing a few simple and inexpensive changes (EECA Business, 2010a).

The second reason given by respondents was the demand from consumers. In two cases venues were induced to implement more environmentally friendly practices as the result of hosting specific events. However, in the majority of cases it was a more general sense of a demand existing. One quote from a CBD hotel representative summarises this sentiment "It's something that you just have to do these days. Most of the PCO's and a lot of the big corporates require all their suppliers to be green friendly."

Interestingly this research also found that the economic climate was impacting on this trend. Five of the venue representatives interviewed noted that the environment seemed to have taken 'a back seat' since the global economic crisis. "That side of things has gone quiet since the recession" (suburban multipurpose venue representative) and "It's definitely taken a back seat to budget considerations at the moment" (another suburban multipurpose venue) demonstrate this point.

As previously discussed the advances in information and communication technology and specifically the internet have had an impact on the MICE sector by contributing to shorter lead times for events. This research found that these advances are impacting on the sector in other ways as well. Both the PCO's reported an increase in the use of technology in the delivery of event. Many of the ways in which technology were being utilised were quite simplistic, such as on-line registrations and conference papers being distributed digitally instead of as paper copies (which also is being justified on the grounds of environmental friendliness). They also reported that while they had experienced a slow increase in demand, the new technology has not resulted in a decrease in the number of face to face events. This is similar to the findings of other studies conducted internationally that indicate that currently only a small proportion of businesses have replaced any face-to-face meetings with virtual events (Braley, 2008; HBI Meetings Management, 2008; Pearlman & Gates, 2010). Two other interviewees; an audio visual supplier representative and an equipment hire company representative also noted a slow increase in the number of events wanting to include technology based elements in their event such as real time web based content. Keeping up with these technological advancements was identified as a challenge for the sector, and this will be discussed in greater detail later in this chapter.

9.5 A challenging time to conduct this research

There have been a number of factors that have presented challenges for this research and have resulted in lessons for future research. The first of these factors is the global economic crisis that occurred in 2008. As detailed in chapter six of this thesis, the economic crisis and subsequent recession have certainly impacted on the MICE sector in Auckland, and hence on the current research process. Almost all interview participants reported fewer events being held with an emphasis on cost cutting by event organisers. Fewer events were being held, and fewer delegates attended those events during the period of the data collection and thereby reduced the pool of possible questionnaire respondents. It is also possible that other issues and trends may not have been uncovered by this research. The economic situation was frequently the first thing mentioned by interviewees when questioned about current issues. The dominance of issues relating to the economic climate during the period of the data collection may mean that other issues and trends were overlooked, and it is thought reduced past emphases on environmental management concerns.

The second issue was the introduction of the process of data collection initiated by Covec on behalf of the Tourism Strategy Group, Ministry of Economic Development. Initially the research process was designed so that venue representatives participating in the study completed a brief questionnaire detailing the number of events held at that venue in a 12 month period, the type of these events and the number of persons attending each event. The Convention Activity Survey (CAS) also asked venue representatives to provide this information, albeit in a slightly different form. Many of the larger venues who participated in this research also participated in the CAS and as such were not willing to also provide information to the researcher regarding number and type of events held at that venue. This led to this self-completion questionnaire being abandoned. The CAS was, at the beginning of the data collection for this research, being managed by Angus and Associates and the report was not made publicly available. At the conclusion of the Angus and Associates contract the CAS was not conducted for a period of time, before being re-started under the management of Covec, who now provide quarterly reports, which are available from the Tourism Strategy Group's website. While there have been significant improvements made to CAS, there is no data available regarding MICE activity in the region publicly available for any period prior to July 2009.

The second survey, managed by Covec on behalf of the Tourism Strategy Group, is the Convention Delegate Survey (CDS). This survey was introduced in July 2009 during the period of data collection for this project and had a significant impact on the number of delegate questionnaires that were returned for this research. A total of 16 event organisers declined to distribute questionnaires to delegates as they had already agreed to participate in the CDS and with their own feedback surveys felt that another questionnaire would be too much to expect of delegates. Further to this, with the exception of one respondent, these organisers also failed to complete an event organisers' questionnaire.

Consequently one lesson for future research is that timing is important, and that plans may go awry if other organisations, especially governmental ones, commence research that involve the same parties as those being sought by a doctoral researcher! By the same token, any such researcher will need to establish positive relationships with a commercial provider of research, and that relationship may be difficult to establish.

In examining this thesis it will have been apparent that the sample sizes are quite small, with a total of 41 semi-structured interviews and 129 questionnaires being the basis for this research. While these small sample sizes do reduce the usability of the data generated by each individual sample, they are, when triangulated with the findings from the Delphi process more than adequate for achieving the objectives of this thesis.

There are two main reasons why this is the case. The first of these reasons is that when combined, the data from these samples provides a considerable body of evidence to support the findings of this thesis. The research process was designed with the principles of consultative strategic planning in mind. Using these principles, maximising stakeholder involvement and input into the development of a possible plan meant enhanced commitment to the implementation and on-going management of the research (Gunn & Var, 2002; Hall, 2000; Hede & Stokes, 2009; Simpson, 2001). It is the stakeholders on the supply side of the sector that will be implementing any plans that are developed, so therefore it is these stakeholders who need to be involved in the development of a plan for the sector. Accordingly the research was designed so that the focus of the data collection involved supply-side stakeholders. For this reason data were collected from these stakeholders and included the use of face to face interviews. These interviews did achieve saturation point, or in other words, a point where no new information was being gathered from successive interviews (Charmaz, 2005; Jennings, 2001). The interviews are a basis for the overall results but they were not the only source of information utilised. The interview data were triangulated with questionnaire surveys, and in turn the aggregated dataset led to the development of the Delphi questionnaire. This Delphi process was then used to confirm the previous findings, and as such ensure the credibility of the overall results.

The second reason why the individual small sample sizes is not a concern is related to the highly contextualised nature of the research. As was described in the chapter two, while regarded as important to Auckland the, the MICE sector is in fact only a small component of the Auckland region's economic activity, and the numbers of potential respondents are relatively small in number. It is argued that the interview samples are in fact representative of the Auckland MICE sector. As stated in chapter four of this thesis, suppliers and venues were identified through membership of either the then existing Business Tourism Auckland or Convention and Incentives New Zealand. Accordingly a total of 43 venues and 20 suppliers were identified. Of these, 30 venues and 11 suppliers participated in the interview phase of this research. These participants represented a range of venues in terms of size, type and location in the region, and the suppliers represented a range of different types of suppliers, covering all the identified categories except security services.

9.6 Opportunities and Challenges for the sector moving forward

There is no doubt that the MICE sector is a highly lucrative sector of the tourism industry and because of this it is highly desirable to further develop the sector in the Auckland region. Globally the MICE sector continues to grow (Kim & Park, 2009; Morla & Ladkin, 2007; Weber & Ladkin, 2004) and despite the recent economic crisis this growth is forecast to continue (Hughes, 2010; Ministry of Economic Development, 2010; Shapiro, 2010). This research has found that stakeholders believe there is an opportunity for the Auckland region to increase its market share of MICE events. As was previously discussed in this chapter the region has strength in a number of areas that form important factors in the destination selection decision for event organisers. Previous studies (e.g. Chen, 2006; Hankinson, 2005; Oppermann, 1996; Ryan et al., 2007; Toh et al., 2007) have identified venue related factors and accessibility of the destination as two of the most important factors in the destination selection decision. As previously discussed the Auckland region is strong in both of these areas, and with the upgrades that are occurring at a number of venues, and the construction of new venues including the planned new convention centre, the region is becoming even stronger in this regard. These strengths combined with the diverse range of environments and experiences on offer in the region provide a solid platform on which the region can create a compelling marketing message in order to increase market share of MICE events.

The economic climate is certainly presenting the region's MICE sector with some significant challenges, yet in some instances it is also providing the region with an opportunity to attract new business that would not have previously come to the region. To some extent the region is already doing this, particularly in relation to the Australian market. Three of the venue representatives interviewed identified that they had received an increase in business coming from Australia. One CBD hotel representative put it as "In the past they've had their conferences in places like Fiji, and for them to turn around and say 'this year we are conferencing in Australia', I don't think so. So instead it's like let's go to New Zealand."

A further factor, albeit a sad one, that presents an opportunity for Auckland to increase its market share of MICE events is the current closure of the Christchurch Convention Centre. The Centre suffered considerable damage in the earthquake that occurred on the 22nd of

February 2011 and it was announced on June 17th 2011 that engineers for Christchurch City Council recommended the facility be demolished (V Base Ltd, 2011). With the closure of the centre a number of events will need to relocate to different destinations. Auckland, due to its having large venues capable of hosting the size of event that the Christchurch Convention Centre could host, is well positioned to capitalise on this opportunity.

With a solid base of strengths to capitalise on and external factors creating opportunities to attract additional business it seems that Auckland does indeed have a real opportunity to increase the number of MICE events being held in the region, but to do so the sector needs to overcome some significant challenges. The majority of these challenges stem from the weaknesses of the sector that have been identified by this research. As was discussed earlier in this chapter, the sector currently lacks unity and a long term strategic focus. These weaknesses were reflected in 2010 by informants' perceived lack of collaboration, lack of a unique brand for the region and the lack of a unified vision for the future. The most important challenge for the sector to address is in creating a unified strategic direction, which then guides the actions of individual supply side stakeholders. In order for this to occur the sector requires leadership, and this leadership needs to come from ATEED. This need in itself presents a challenge for the sector. ATEED is clearly focussed on *major* events, as is evident from their Statement of Intent 2010-2013 (Auckland Tourism Events and Economic Development Ltd., 2010). At this time it would appear that the smaller MICE sector is being by and large overlooked by ATEED in favour of what it considers as iconic events. If ATEED were to take on this leadership role for the MICE sector and focus on developing a strategy for the sector, given current budget limitations, this would require diverting some funding from other areas and in light of their current focus, this would seem improbable. Convincing ATEED of the worth of the whole sector and the need for development of a strategy to capitalise on opportunities is the biggest challenge for the sector at this time. One danger of focussing solely on major iconic events is that the other, the worth of other smaller event types is overlooked, and as a result their needs are not met by the region (Getz, 2007; Whitford, 2009). The effect of this would be devastating for many of the participants in this study, some of whom rely on current MICE business for over 50% of their revenue.

A further challenge for the sector is Auckland's geographic distance from the major MICE generating markets of North America and Europe. Although Auckland is becoming increasingly accessible from the rest of the world, global factors are combining to make this geographical and psychic distance more of a challenge for the MICE sector in the region. Firstly the economic climate continues to have an impact on global markets, and in response to this, organisations are continuing to restrict spending on items such as MICE events. Greater geographical distances translate to greater travel costs, which in the current market place is not desirable. Ever rising fuel prices further increase these travel costs and again increase the challenge that Auckland's geographical isolation poses. Further adding to the significance of the challenge of geographical isolation is the global trend towards increased awareness of and attention to environmental issues. Globally air travel has been estimated to account for between two and five per cent of all greenhouse gas emissions (Kollmuss & Lane, 2008) and with organisations seeking to minimise their environmental impact, minimising travel, particularly long haul flights is one way in which they can do this. There are of course carbon offsetting options available, however these accrue additional costs, which as previously discussed, are not generally considered desirable by conference organisers. Unlike the challenges previously discussed this is not a challenge resulting from a weakness in the way the sector is currently operating. That is not to say, however, that Auckland's geographical isolation presents an insurmountable hurdle for the further development of the

Auckland MICE sector. What it does mean is that the sector needs to identify its best potential target markets and then position itself in such a way as to attract these markets to bring their MICE events to the region.

Continual advances in information and communication technology poses a further challenge for the Auckland MICE sector. The challenge is in ensuring that the region keeps up with technological advancements and is incorporating new technology in the delivery of MICE events. The Delphi panel confirmed that this is a real challenge for the sector when they gave a mean score of 6.31 to the statement ‘We need to ensure that we keep up with technological advancements and ensure that we are utilising new technologies in the MICE events we hold in the Auckland region’. This research found that two main factors made this keeping up particularly challenging for the region. The first of these factors was the current lack of high speed broadband infrastructure in the region. This was an issue that was brought up during the interview phase of this research by a representative of a suburban conference centre, the a/v supplier representative and an equipment hire representative in the context of Auckland’s lack of ability to conduct large scale video conferencing. The equipment hire company representative was more concerned with delivering web based content at events. This issue was confirmed as being of concern for the sector when using the Delphi process. The panel were presented with the statement ‘Auckland needs to improve our capability to deliver web based, real time content at events. To do this we need high speed broadband capability’ and the third and final round this statement received a mean score of 6.23 out of a possible seven. This shows that the panel believe there is considerable truth in this statement.

The second factor that makes keeping up with new technology a challenge for the sector is the continual need for investment in these new technologies. One of the PCO’s, while talking about some of the technology he had seen during a recent visit to the United States, said *"It would be really cool to be able to use that stuff in our events but we just can't afford to invest it ourselves, not when there is always new stuff coming out so it's out-dated almost straight away"*. A CBD hotel representative also noted this need to continually update technology *"We've just had an upgrade so now got wi-fi in all the guest rooms and the meeting rooms. It's pretty amazing when you think it was only like ten years ago that not all meeting rooms even had data projectors"*.

Although the sector does face some significant challenges, there is an opportunity for the sector to be developed and to increase the number of MICE events held in the region. This, however, requires a different approach to be taken to the marketing and management of the sector. The approach needed is a strategic one, where actions are centred on achieving common goals for the future. The next section of this chapter outlines a proposed framework that could be used to guide the implementation of a strategic planning process in the region and summarises the recommendations the researcher would make to ATEED as a result of this research. This section also outlines the areas for further research that have been identified.

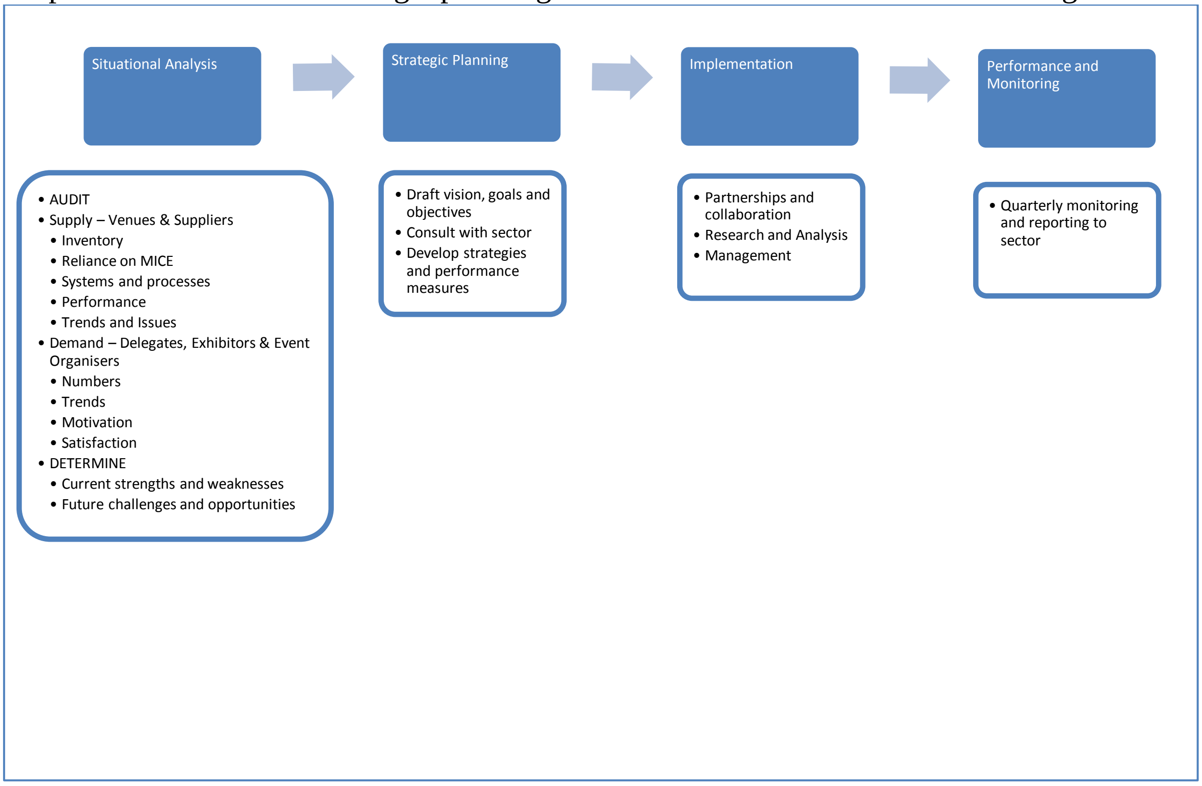
9.7 The Proposed Framework and Recommendations

The focus of Chapter Three of this thesis was on strategic planning and the benefits of having planning and management systems in place. New Zealand as a country is well advanced in terms of planning for tourism at a national level, and indeed at a regional level for many parts of the country. Indeed Auckland has previously had in place both visitor and major event strategies (Auckland Plus, 2007, 2008), and ATEED has also developed strategies in both these areas (Auckland Tourism Events and Economic Development Ltd, 2011a, 2011b). That said, there is at this time a lack of planning specifically addressing the MICE sector, and this thesis has attempted to a least partially address that gap. One objective for this research, as previously listed, was to 'to propose a model of strategic planning for implementation at regional industry sector level'. This achievement of this objective makes an important contribution to the literature regarding strategic planning within the tourism industry context. The model proposed by this thesis, shown in figure 9.2, is the focus of this section. The components of the model are described, along with how this research has shown the validity of the model for guiding strategic planning for the MICE sector at a regional level.

As can be seen in figure 9.2, the framework proposed here is based on the framework included in the *Tourism Planners Toolkit* (Tourism Recreation Research and Education Centre, 2004), previously discussed in chapter four of this thesis. Like the model in the *Tourism Planners Toolkit* this framework is also comprised of four stages, the first of these being situational analysis. The focus of this research has been on completing this phase of the process and thereby determining what is required in later stages of the process of strategic planning.

This research has demonstrated that there is a clear need for a strategic plan to be developed and implemented for the MICE sector in the Auckland region. There is a desire amongst sector stakeholders to see an increase in the number of MICE events held in the region. It is likely that this will happen to some extent, as globally the MICE sector continues to grow. However, the region at this time has some clear deficiencies in the way the sector operates. Without a planned, strategic approach to development it is unlikely the sector will meet its full potential, nor be developed in a manner that is sustainable in the long term. As the central body responsible for the management and promotion of the Auckland region as a MICE destination, ATEED needs to play the lead role in developing and implementing a strategy for the sector.

Figure 9.2 –
Proposed framework for strategic planning for the MICE sector in the Auckland region



The first step for ATEED in developing this strategic plan is to develop a vision for the future of the sector. In this respect the leadership of ATEED is of particular importance. As has been shown by this research, there are disparate views regarding desirable development of the MICE sector. Since the change in the governance structure, and the election of the Auckland Council in November 2010, there has been considerable work in the creation of a vision for Auckland as a whole as articulated in the Auckland Plan discussion document released in March 2011. While the Auckland Plan is still in the consultation phase and does not specifically address the MICE sector, it does provide direction for the future of the MICE sector. When combined with the plans for a new convention centre for the city, this provides a solid base on which to form a vision for the MICE sector. The challenge for ATEED is to gain stakeholder support for and commitment to achieving the vision they propose. Gaining this support and commitment to the proposed vision is crucial to the successful implementation of any strategic plan (Gunn & Var, 2002; Hall, 2000; Hede & Stokes, 2009; Simpson, 2001). Stakeholder commitment and support is of vital importance to the strategic planning process, as without this support implementation and on-going monitoring of strategies and tactics is incredibly difficult, if not impossible (Hall, 2000; Mintzberg, 1994).

The next phase is determining how the sector is going to achieve this vision. Firstly this involves the setting of specific goals and objectives and defining the measures that will be used to assess performance. This needs to completed in consultation with stakeholders, as not only are they the ones who will implement changes to achieve these objectives, but they also are the ones who can provide much of the information required in order assess performance. These goals and objectives need to be realistic, and this requires them to be based on the current performance of the sector. The findings of this thesis provide an invaluable platform on which to base this process of developing these objectives. Much of the work of conducting a situational analysis has been completed in this research. The findings in relation to current strengths and weaknesses of the sector, and opportunities and challenges the sector is facing have made it possible to identify where development is needed in the sector. The two main areas that this research has identified as requiring development are in relation to collaboration within the sector and improving the way in which the region is marketed as a MICE destination. Accordingly it is recommended that the emphasis of the strategic plan should be on finding ways for stakeholders to work together, and on developing a unique and compelling marketing message. Finally before the implementation of the strategic plan can begin, specific tactics need to be developed for achieving the specified objectives.

The next phase of the strategic planning process is implementation. As in the previous phase, ATEED's central role makes it the most appropriate organisation to manage and coordinate the implementation. Additionally, and again as previously identified, implementation of the strategies and tactics developed will require action on behalf of multiple stakeholders in the sector. One of the functions that ATEED will need to perform during this phase is the role of facilitator of partnerships and collaboration. As has been discussed in this chapter, this is not a role that appears to have been done well up until the point in time of the data collection. While it is not known how well ATEED has been performing in this role, this is a question that needs answering and improving this functionality may be something that will need to be addressed as part of the actual planning process.

The last phase of the strategic planning process proposed is monitoring and evaluation. As discussed earlier, stakeholder involvement and commitment is of vital importance to the success of the strategic planning process. Regular monitoring of progress towards achieving the set objectives is an important element of maintaining stakeholder support for the strategy. Not only does regular feedback keep the strategy at 'front of mind', but it also provides opportunity for stakeholders to continue their involvement by suggesting new ideas and tactics that could improve outcomes (Atkinson, Waterhouse, & Wells, 1997). A number of interviewees in this study made note during their interview that they tend to get caught up in the day to day running of their business, leaving little time to be involved in strategic activities. Given this, the proposed framework includes a quarterly monitoring and feedback process. Further to this, it is recommended that performance data are distributed both as a written report and included as a regular section of ATEED's industry briefing sessions. In this phase it will also be crucial that ATEED displays strong leadership and commitment to the strategic plan. It is in these phases that changes to ways in which the sector currently operates will occur. Change management can be considered a management discipline in its own right, and it is not the purpose of this thesis to explore how best to manage change within the sector. That said however, it is commonly acknowledged that there are often challenges associated with implementing change, and that individuals often resist change (Forster & Browne, 1996; Lewis, Morkel, Hubbard, Davenport, & Stockpot, 1999; Robbins et al., 1997; Stone, 2008; Wood et al., 1998). Also widely acknowledged by these same sources, is that strong leadership is required to successfully bring about change.

A further reason why ATEED needs to display strong leadership during these phases is that further research will always be required as part of the monitoring process. Some research will be marketing specific, such as determining the most desirable positioning strategy for the region, some will be of a benchmarking nature such as comparisons with competitors while other research may be oriented toward evaluating the impact of implementing the strategic plan. Much of the focus of this thesis has been on determining the current position of the Auckland MICE sector. Determining future progress requires an assessment of the initial starting position (Tourism Recreation Research and Education Centre, 2004). In this respect, a considerable amount of the data required to assess performance will be of the same nature as the data utilised in this research. As was discussed earlier in this chapter the researcher encountered significant challenges in generating this data, and these challenges primarily stemmed from the fact that stakeholders were unwilling to share what they believe to be sensitive information. ATEED will need to address this challenge if it is to be able to evaluate the progress the sector makes.

A final recommendation to ATEED, not directly related to the strategic planning process, is that consideration needs to be given specifically to the domestic MICE market. Currently domestic, including local MICE attendees, account for the lion's share of attendees at MICE events in the region, with over 95% of all MICE delegates being from within New Zealand (Covec, 2010a). The purpose of constructing an international standard convention centre in the region is stated as being to attract more international MICE delegates (Ruhanen, 2010) and while it is important that this is addressed in the strategic planning process, it is equally important to ensure that Auckland maintains, if not increases its market share of domestic MICE events. For this reason, ATEED needs to ensure that the domestic market is not overlooked during the strategic planning process.

9.8 Concluding Statement

At the beginning of this process the researcher set out to assist Tourism Auckland to develop a strategy for the MICE sector in the Auckland region and in doing so make a contribution to the literature regarding the MICE sector in a New Zealand context. In terms of contribution to the literature this research has not only contextualised the MICE sector within New Zealand generally and Auckland specifically, but it has also contributed to the literature on strategic planning for the MICE generally. While a strategic plan is yet to be developed for the MICE sector in Auckland, the findings of this thesis provide a platform on which a strategic plan can be developed. This thesis also provides evidence for the need of such a strategic plan.

The current state of the MICE sector in the Auckland region is one of dysfunction. There are significant power imbalances, and very little communication and collaboration occurring. There is also a distinct lack of leadership and coordination for the sector. These dysfunctions have led to intense competition between within the region, high levels of distrust between stakeholders and the lack of unified, compelling message to attract MICE events to the region. This thesis has shown that the implementation of a formal, consultative strategic planning process could assist the sector to overcome some of these dysfunctions. A properly implemented consultative process would provide those legitimate stakeholders who are currently without power with a voice. Further to this, a consultative process by its nature requires communication and provides opportunities for collaboration.

The Auckland region has been through a period of considerable change with the introduction of the Auckland Council in November 2010. This change in governance has seen Tourism Auckland, as well as former local council units responsible for tourism and events, being amalgamated into a new body Auckland Tourism, Events and Economic Development Ltd. The Auckland Council has set a clear vision for the future of the Auckland region, and it is the role of ATEED to implement policies and programs that support the achieving of this vision. With a new international standard 3500 seat National Convention Centre set to be fully operation in just three years, now is the time for the ATEED to put in place plans and strategies to ensure that MICE sector can contribute to the achieving this vision.

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Appendix A – Venue Interview Questions

<u>Event Venues – Interview Questions</u>

<u>Section 1 – MICE related business</u>

1. Approximately what proportion of your total business revenue was attributable to MICE events by each quarter in the past financial year (1 April 2008 – 31 March 2009)?

	Approximate %
Q1	
Q2	
Q3	
Q4	
Total	

<u>Section 2 - Accommodation</u>

2. Does your venue offer accommodation to delegates?

❑Yes ❑ No (please go to Q.9)

3. Is the accommodation offered:

❑Part of the same business
❑A separate business owned by same company
❑A separate business owned by another company

4. What classification is the accommodation offered?

❑ Budget (1-2 star) ❑ Standard (3 star) ❑ Deluxe (4 star) ❑ Luxury (5 star)

5. Is this a qualmark rating?

❑Yes ❑ No

6. What, if any, discount do you offer to attendees at events?

____

7. What proportion of attendees at multi day events use the accommodation you provide?

_______________ %

<u>Section 3 - Systems and Processes</u>

In this section of the interview you will be asked questions regarding the systems and processes you currently have in place within your organisation.

8. Do you have processes in place to obtain, monitor and action feedback from clients and event attendees?
   ❑Yes ❑ No
   If YES, can you please briefly describe these processes?

9. Do you have formal processes in place to manage human resource issues including recruitment, training and performance?
   ❑Yes ❑ No
   If YES, can you please briefly describe these processes?

10. Do you participate in any externally managed/accredited quality programmes?
    ❑Yes ❑ No
    If YES, which programmes do you participate in?

11. Do you have in place any formal partnerships or supply contracts with other organisations?
    ❑Yes ❑ No
    If YES, which other organisations do you have these relationships with?

12. What are the main ways in which your venue is promoted?

13. Do you have in place any specific 'green' or environmental initiatives?
    ❑Yes ❑ No
    If YES, what is the main reason for having this initiative in place?

Section 4 – Current Issues

You will be asked to describe any issues and the affect of these issues.

14. Are there any issues resulting from factors related to the industry and/or region as a whole that are currently affecting the operation of this business?
15. Are there any issues resulting from venue associated factors that are currently affecting the operation of this business?
16. What do you think will be the major challenges for this business over the next 5 years?
17. Can you identify any significant opportunities for this business to capitalise on in the next 5 years?

Section 5 - Event Bookings

18. In order to allow the researcher to speak to a broad cross section of attendees at MICE events, please provide as much detail as possible regarding upcoming events booked at your venue. Details requested include the type of event, projected number of attendees, the date/s the event is to be held.

Appendix B – Project Information Sheet for Interviews

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KO TE TANGATA
The University of Waikato
Te Whare Wānanga o Waikato

Achieving a sustainable MICE sector for the Auckland region – Facilitating strategic planning and management

Project Information Sheet

Overview
For my doctoral research project, I am looking at developing a model for implementing strategic planning for a specific regional sector of the tourism industry, the Auckland MICE (Meeting, Incentives, Conventions & Exhibitions) sector. The project is being completed in 2 phases, the first being an analysis of the current situation for the sector in the region. This involves collecting information from individuals attending events, organising events and supplying events. The information generated in this first phase will be used for strategic planning in the second phase of the project.

Who's responsible?
My name is Mirrin Locke. You can phone me on 021 952 331, email me at mml11@waikato.ac.nz or contact me at the address on the letterhead.

What's the research study about?
The study is about enabling the sector to be developed and managed in a sustainable manner, by developing and implementing a strategic plan.

What will you have to do and how long will it take?
I will conduct an interview with you either face to face or via telephone. Each interview is expected to be approximately 45 minutes in duration. Prior to the interview I will email you a question sheet to allow you to collate the required information for the interview.

What will happen to the information collected?
The responses will be used by the researcher to compile a report on the current situation of the MICE sector in Auckland. This report will be used to inform the development of a strategic plan for the sector and will be distributed to industry representatives who participate in the planning phase of this project. The report will be primarily statistical in nature, however no participants will be named in the situational analysis report or the researcher's thesis unless explicit consent has been given, and every effort will be made to disguise their identity. Only the researcher and the researcher's supervisors will be privy to the questionnaires returned, notes and tapes of interviews. After the completion of the researcher's thesis, the questionnaires and notes will be destroyed and tapes erased.

Declaration to participants
If you take part in the study, you have the right to:

- Refuse to answer any particular question, and to withdraw from the study at any time.
- Ask any further questions about the study that occur to you during your participation.
- Be given access to a summary of the findings from the study when it is concluded.

Appendix C – Supplier Interview Questions

Supplier – interview questions

<u>Section 1 – Business Details</u>
In this section of the interview you will be asked some questions about the nature of your business and involvement with the MICE sector.

1. Type of supplier:
   - ❑ Accommodation
   - ❑ Catering
   - ❑ Equipment
   - ❑ Labour Hire
   - ❑ Other (please specify)

2. Do you have supply contracts with any specific venues?
   - ❑ No (go to Q4)
   - ❑ Yes (please specify)

3. Is this contract/s exclusive?
   ❑ Yes ❑ No
   If not, why do you think this is the case?

<u>Section 2 - Systems and Processes</u>
In this section of the interview you will be asked questions regarding the systems and processes you currently have in place within your organisation.

19. Do you have processes in place to obtain, monitor and action feedback from clients and event attendees?
    ❑Yes ❑ No
    If YES, can you please briefly describe these processes?

20. Do you have formal processes in place to manage human resource issues including recruitment, training and performance?
    ❑Yes ❑ No
    If YES, can you please briefly describe these processes?

21. Do you participate in any externally managed/accredited quality programmes?
    ❑Yes ❑ No
    If YES, which programmes do you participate in?

22. What are the main ways in which your business is promoted?

23. Do you have in place any specific ‘green’ or environmental initiatives?
    ❑Yes ❑ No
    If YES, what is the main reason for having this initiative in place?

Section 3 – Issues, challenges and opportunities

You will be asked to describe any issues and the affect of these issues.

24. Are there any issues resulting from factors related to the industry and/or region as a whole that are currently affecting the operation of this business?
25. Are there any issues resulting from venue associated factors that are currently affecting the operation of this business?
26. What do you think will be the major challenges for this business over the next 5 years?
27. Can you identify any significant opportunities for this business to capitalise on in the next 5 years?

Appendix D – Questionnaire Information Sheet

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Overview

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Who's responsible?

My name is Mirrin Locke. You can phone me on 021 952 331, email me at mml11@waikato.ac.nz or contact me at the address on the letterhead.

What's the research study about?

The study is about enabling the sector to be developed and managed in a sustainable manner, by developing and implementing a strategic plan.

What will you have to do and how long will it take?

I will ask you to complete the attached survey questionnaire. In most cases this will take no longer than 15 minutes to complete.

What will happen to the information collected?

The survey responses will be used by the researcher to compile a report on the current situation of the MICE sector in Auckland. This report will be used to inform the development of a strategic plan for the sector and will be distributed to industry representatives who are participating in the planning phase of this project. Information used in the report will be primarily statistical in nature and the questionnaires are to be completed anonymously. Only the researcher and the researcher's supervisors will be privy to the questionnaires. After the completion of the researcher's thesis, the questionnaires will be destroyed.

Declaration to participants

If you take part in the study, you have the right to:

- Refuse to answer any particular question, and to withdraw from the study at any time.
- Ask any further questions about the study that occur to you during your participation.
- Be given access to a summary of the findings from the study when it is concluded.

Appendix E – Delegate Questionnaire

Delegate Questionnaire

Event Code:

Section A: Travel Details

1. Did you travel to this event from outside the Auckland region?

   ❑ Yes
   ❑ No (please go to Section B-Q17)

2. Did you travel to this event with anyone else?

   ❑ Yes ❑ No

3. If YES, how many people did you travel with?

   ____

4. Are all of these people attending the event?

   ❑ Yes ❑ No

5. If NO, please indicate the number of these people and their relationship to you?

Relationship	Number
Spouse/partner	
Children	
Other relative	
Friend	
Work colleague	

6. How did you travel to Auckland?

International flight	
Domestic flight	
Bus/coach	
Rental vehicle	
Private car	
Other (please specify)	

7. Which response best describes your accommodation arrangements during this event?

Home of friends or relatives	
Hotel	
Motel	
Serviced apartment	
Other (please specify)	

8. If you are staying in a Hotel, Motel or Serviced apartment, what is the star rating of the property?

Luxury (5 star)	
Deluxe (4 star)	
Standard (3 star)	
Budget (1 or 2 star)	

9. How did you book your travel and accommodation?

Mode of booking	Travel	Accommodation
Through conference organiser		
With travel agent		
Directly with travel or accommodation provider		
Through the internet		
Other (please specify)		

10. How many nights will you stay in the Auckland region?

____

11. Will you visit any other regions in New Zealand during this trip?

    ❑ Yes ❑ No

12. If YES, which regions will you visit and how many nights will you spend in each region?

____
____
____

13. Was attending this event the primary purpose of this current trip?

    ❑ Yes ❑ No

14. Have you visited the Auckland region before?

    ❑ Yes ❑ No

15. If YES, when was your last visit?

____

16. What other activities have you participated in, or intent to participate in during your stay in Auckland?

Activity	Have participated	Intend to participate
Adventure activities/sports		
Bar/nightclub		
Boat trip		
Concert/theatre		
Eating out/restaurant		
Gallery visit		
Gambling/casino visit		
Gentleman's club/Adult entertainment		
Historic site visit		
Maori performance/ cultural visit		
Museum visit		
Shopping		
Sightseeing		
Sport event		
Vineyard/winery visit		
Visiting friends or relatives		
Walking		

Section B: Decision to Attend

17. Using a scale of 1 to 7, where 1 represents 'low influence' and 7 represents 'high influence', to what degree did each of the following factors influence your decision to attend this event?

Factors	No influence					High influence		
Directed by employer to attend	1	2	3	4	5	6	7	N/A
Attend this conference every time it is held	1	2	3	4	5	6	7	N/A
Networking/business opportunities	1	2	3	4	5	6	7	N/A
Business/education content of the conference programme	1	2	3	4	5	6	7	N/A
Social programme of the conference	1	2	3	4	5	6	7	N/A
Opportunity to visit somewhere new	1	2	3	4	5	6	7	N/A
Previous visit/s to Auckland	1	2	3	4	5	6	7	N/A
Safety/security of the Auckland region	1	2	3	4	5	6	7	N/A
Accommodation and hotel facilities	1	2	3	4	5	6	7	N/A
Food and dining opportunities	1	2	3	4	5	6	7	N/A
Opportunities for sightseeing and/or leisure activities	1	2	3	4	5	6	7	N/A
Availability of nightlife	1	2	3	4	5	6	7	N/A
Time availability	1	2	3	4	5	6	7	N/A
Funding availability	1	2	3	4	5	6	7	N/A
Transport costs	1	2	3	4	5	6	7	N/A
Accommodation costs	1	2	3	4	5	6	7	N/A
Conference costs including registration and optional extras	1	2	3	4	5	6	7	N/A
Exchange rate (overseas visitors only)	1	2	3	4	5	6	7	N/A
Comparisons with other events held this year	1	2	3	4	5	6	7	N/A
Other (please specify)	1	2	3	4	5	6	7	N/A

Section C: Satisfaction

18. Using a scale of 1 to 7, where 1 represents ‘very dissatisfied’ and 7 represents ‘very satisfied’ how satisfied where you with the each of the following aspects of this event?

Factors	Very dissatisfied						Very satisfied	
Organisation of the event	1	2	3	4	5	6	7	N/A
Programme of the event	1	2	3	4	5	6	7	N/A
Networking opportunities	1	2	3	4	5	6	7	N/A
Social programme of the event	1	2	3	4	5	6	7	N/A
Location/accessibility of the venue	1	2	3	4	5	6	7	N/A
Set-up,size and comfort of meeting facilities at venue	1	2	3	4	5	6	7	N/A
Places to sit at the venue	1	2	3	4	5	6	7	N/A
Toilet facilities at the venue	1	2	3	4	5	6	7	N/A
Other facilities at the venue	1	2	3	4	5	6	7	N/A
Food and Beverages at the venue	1	2	3	4	5	6	7	N/A
Range of accommodation options	1	2	3	4	5	6	7	N/A
Quality and cleanliness of the accommodation	1	2	3	4	5	6	7	N/A
Value for money of the accommodation	1	2	3	4	5	6	7	N/A
Range and availability of transport to and from the region	1	2	3	4	5	6	7	N/A
Range and availability of transport within the region	1	2	3	4	5	6	7	N/A
Safety and security within the Auckland region	1	2	3	4	5	6	7	N/A
Food and dining opportunities	1	2	3	4	5	6	7	N/A
Opportunities for sightseeing and/or leisure activities	1	2	3	4	5	6	7	N/A
Availability of nightlife	1	2	3	4	5	6	7	N/A
Other (please specify)	1	2	3	4	5	6	7	N/A
Overall satisfaction with your attendance at this event	1	2	3	4	5	6	7	N/A

19. Using a scale of 1 to 7, where 1 represents ‘definitely won’t’ and 7 represents ‘definitely will’ please circle the response that indicates how likely you are to:

	Definitely won’t	Very unlikely	Unlikely	Undecided / Don’t Know	Likely	Very likely	Definitely will	
Visit the Auckland region again?	1	2	3	4	5	6	7	N/A
Attend the same event next time it is held?	1	2	3	4	5	6	7	N/A
Recommend the region to colleagues and business associates?	1	2	3	4	5	6	7	N/A
Recommend the event to colleagues and business associates?	1	2	3	4	5	6	7	N/A

Section D: Expenditure

20. Please estimate how much you have spent or intend to spend during this trip, including any amounts paid before arrival, excluding international airfares.

Expense items	Employer paid or reimbursed	Personal	Other party members (non attendees)
Event registration fees including optional extras (e.g. social opportunities, workshops etc)			
Accommodation			
Shopping (e.g. souvenirs, clothing, toiletries)			
Local transport (e.g. taxi, hire car)			
Restaurants and cafes			
Other meals			
Airfares within New Zealand			
Theatre, concerts, cinemas			
Tours (e.g. sightseeing, sports event)			
Recreational activities			
Other			
Total Expenditure			

Section E: Background Information

21. What is your normal place of residence?

____

City/Town Country

22. What is your occupation?

____

23. What is your gender?

Female	
Male	

24. What age group do you fit into?

18 – 24 years	
25 – 34	
35 – 44	
45 – 54	
55 – 64	
65 +	

25. Are there any other comments you would like to make in relation to this event?

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Thank you for taking the time to complete this questionnaire.

Appendix F – Event Organiser Questionnaire

Event Organiser Questionnaire

Section 1 – Event Details

Event Venue:
Event Dates:
Event Duration:

1. Is this a recurring event?

❑ Yes ❑ No (please go to Q.3)

2. How often does this event occur?

❑ Monthly
❑ Quarterly
❑ Six monthly
❑ Annually
❑ Bi-annually
❑ Other (please specify) ______________________

3. Which media were used to advertise this event?

❑ Television
❑ Radio
❑ General newspapers
❑ Trade Press
❑ Association Newsletters
❑ Internet
❑ Direct mail/email
❑ Other (please specify) ________________________
❑ N/A

4. Which category/ies best describes this event?

❑ Meeting (please complete section 2)
❑ Conference (please complete section 2)
❑ Convention (please complete section 2)
❑ Incentive Gathering (please complete section 2)
❑ Exhibition (please complete section 3)

Section 2 –Delegates

Please complete this section for all events that included a ***meeting, conference, convention or incentive gathering component****.*

5. Are you a........?

❑ Local or National Government Organisation
❑ Public Sector Enterprise/SOE
❑ Private company
❑ Association
❑ Education provider

6. How many delegates were expected to attend the event? _____________

7. What was the actual number of delegates who attended? _____________

8. Of the delegates who attended, what is the breakdown of types of visitors?

International visitors	
Domestic visitors	
Local residents	
TOTAL	

9. Can you provide a demographic profile of the delegates who attended?
❑ No ❑ Yes (please attach as a separate sheet or email to mml11@waikato.ac.nz)

Section 3 – Exhibitors and Exhibition Attendees
Please complete this section for all events which included an ***exhibition component****.*

10. Who organised this exhibition?
❑ Independent show owner
❑ Exhibition management company
❑ Association

11. Who attended the exhibition?
❑ Trade Only
❑ Trade and Public
❑ Public

12. How many people attended the exhibition from each of the following categories?

Number by location			
	Local residents	Domestic visitors	International visitors
Trade visitors			
Public visitors			

13. How many exhibitors attended this exhibition from each of the following categories?

Number by location			
	Local residents	Domestic visitors	International visitors
Number of companies			
Number of company representatives			

14. What was the total sold space of the exhibition? ______________________________

Section 4 - Planning

15. Who was responsible for making major decisions in relation to the planning of this event?
❑ Self
❑ Committee
❑ Senior Management
❑ Director/Board

16. When did the organisation start planning this event? ________________________

17. When was Auckland selected as the host region for this event? ______________________

18. If this is a recurring event, has planning for the next event commenced?
❑ Yes ❑ No (please go to Q.22)

19. If this is a recurring event, has the host region/city been selected for the next event?
❑ No ❑ Yes (please specify) __________________________________

Section 5 – Destination Selection

20. Using a scale of 1 to 7, where 1 represents ‘low influence’ and 7 represents ‘high influence’, to what degree did each of the following factors influence the decision to hold this event in Auckland?

Factors	No influence						High influence
Suitability of the venue	1	2	3	4	5	6	7
Previous event held in the Auckland region	1	2	3	4	5	6	7
Strong local host/sponsor in Auckland	1	2	3	4	5	6	7
Large local market base for host organisation to draw upon	1	2	3	4	5	6	7
Safety and security of Auckland	1	2	3	4	5	6	7
Air access to Auckland	1	2	3	4	5	6	7
Road access to Auckland	1	2	3	4	5	6	7
Access to public transport	1	2	3	4	5	6	7
Climate	1	2	3	4	5	6	7
Cosmopolitan nature of Auckland	1	2	3	4	5	6	7
Referrals from associates	1	2	3	4	5	6	7
Range and standard of venues in Auckland	1	2	3	4	5	6	7
Range and standard of accommodation in Auckland	1	2	3	4	5	6	7
Range of social activities available	1	2	3	4	5	6	7
Range of leisure activities and sightseeing opportunities available	1	2	3	4	5	6	7
Support of Auckland Convention Bureau/Tourism Auckland	1	2	3	4	5	6	7
Cost of travel to Auckland	1	2	3	4	5	6	7
Cost of the venue	1	2	3	4	5	6	7
Cost of event related services (e.g. a/v equipment hire)	1	2	3	4	5	6	7
Cost of food and beverage	1	2	3	4	5	6	7
Availability of packages (e.g. package including venue, accommodation and city tour)	1	2	3	4	5	6	7
Proximity of venues and accommodation to CBD	1	2	3	4	5	6	7
Proximity of venues and accommodation to airport	1	2	3	4	5	6	7
Proximity of venue to event attendees	1	2	3	4	5	6	7
Other (please specify)	1	2	3	4	5	6	7

Section 6 – Satisfaction

21. Using a scale of 1 to 7, where 1 represents ‘very dissatisfied’ and 7 represents ‘very satisfied’ how satisfied are you overall, with Auckland as an event destination?

Very dissatisfied						Very satisfied
1	2	3	4	5	6	7

22. Using a scale of 1 to 7, where 1 represents 'definitely won't' and 7 represents 'definitely will' please circle the response that indicates how likely you are to:

	Definitely won't	Very unlikely	Unlikely	Undecided / Don't Know	Likely	Very likely	Definitely will	
Hold another event in the Auckland region?	1	2	3	4	5	6	7	N/A
Recommend the region to colleagues and business associates?	1	2	3	4	5	6	7	N/A

23. What are the main reasons you rated Auckland this way?

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<u>Section 7 – Expenditure</u>

24. By the end of this event, how much money will you (or the host organisation) have spent on each of the following items?

Expenditure Items	$NZ
Venue hire	
Venue associated charges (e.g. security, signs, cleaning)	
Food and beverage on-site	
Food and beverage off-site	
Equipment/production/technical costs	
Administration/Professional Event Organiser	
Advertising and promotion of the event	
Speakers and sponsored attendees	
Insurance	
Transport (including airfares) for yourself and staff	
Accommodation for yourself and staff	
Short term staff for duration of the event (not supplied by venue, catering company etc)	
Other costs (e.g. phone, fax)	
Total spend on this event	

Section 8 – Income

25. By the end of this event, how much money will you (or the host organisation) have received from each of the following items?

Income Items	$NZ
Registration fees from delegates	
Sale of exhibition space	
Sponsorship	
Contributions (e.g. hosting body, other affiliates, etc)	
Financial support (e.g. government, Auckland Convention Bureau)	
Social events (official dinners, reception, etc)	
Other income (please specify)	
Total income received	

Section 9 – Personal Details

26. Are you a Professional Event Organiser?
❑ Yes ❑ No

27. What is the nature of your employment in relation to this event?
❑ Employed on an ongoing basis by the host organisation
❑ Employed on a temporary basis by the host organisation
❑ Employed by a different organisation to the host organisation

28. How many years experience do you have as an event organiser?

____

29. What is your normal place of residence?

____

City/Town Country

30. What is your gender?

Female	
Male	

31. What age group do you fit into?

18 – 24 years	
25 – 34	
35 – 44	
45 – 54	
55 – 64	
65 +	

32. Are there any other comments you would like to make in relation to this event?

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Thank you for taking the time to complete this questionnaire.

Appendix G – Exhibitor Questionnaire

Exhibitor Questionnaire

Section A: Background Information

1. Where is your organisation located?

____
City/Town *Country*

2. What type of organisation do you represent?

- ❑ Public Sector/Government
- ❑ Not for Profit
- ❑ Private Company
- ❑ Education Provider

3. What type of exhibition is this one that you are exhibiting at?

- ❑ Trade only
- ❑ Trade with public day(s)
- ❑ Exhibition as part of a conference
- ❑ Exhibition only

4. How many events has your organisation exhibited at in the past 12 months?

Within New Zealand	Outside New Zealand

Section B: Travel Details

Please answer this section if you have travelled to this event from outside the Auckland region.

5. Did you travel to this event with anyone else?
   ❑ Yes ❑ No

6. If YES, how many people did you travel with?
   ____

7. Are all of these people attending the event?
   ❑ Yes ❑ No

8. If NO, please indicate the number of these people and their relationship to you?

Relationship	Number
Spouse/partner	
Children	
Other relative	
Friend	
Work Colleague	

9. How did you travel to Auckland?

International flight	
Domestic flight	
Bus/coach	
Rental Vehicle	
Private car	
Other (please specify)	

10. Which response best describes your accommodation arrangements during this event?

Home of friends or relatives	
Hotel	
Motel	
Serviced apartment	
Other (please specify)	

11. If you are staying in a Hotel, Motel or Serviced apartment, what is the star rating of the property?

Luxury (5 star)	
Deluxe (4 star)	
Standard (3 star)	
Budget (1 or 2 star)	

12. How did you book your travel and accommodation?

Mode of booking	Travel	Accommodation
Through conference organiser		
With travel agent		
Directly with travel/accommodation provider		
Through the internet		
Other (please specify)		

13. How many nights will you stay in the Auckland region?

____

14. Will you visit any other regions in New Zealand during this trip?
❑ Yes ❑ No

15. If YES, which regions will you visit and how many nights will you spend in each region?

____

____

____

16. What other activities have you participated in, or intent to participate in during your stay in Auckland?

Activity	Have participated	Intend to participate
Adventure activities/sports		
Bar/nightclub		
Boat trip		
Concert/theatre		
Eating out/restaurant		
Gallery visit		
Gambling/casino visit		
Gentleman's club/Adult entertainment		
Historic site visit		
Maori performance/ cultural visit		
Museum visit		
Shopping		
Sightseeing		
Sport event		
Vineyard/winery visit		
Visiting friends or relatives		
Walking		

17. Have you visited the Auckland region before?

❑ Yes ❑ No

18. If YES, when was your last visit?

____

Section C: Expenditure

19. By the end of this exhibition, how much will you or the exhibition organiser spend on the following items?

Expense items	**$**
Floor space (for this stand)	
Stand construction cost	
Equipment hire (e.g. furniture)	
Electricity/lighting	
Advertising/promotion for this event	
Temporary staff	
Airfares within New Zealand (for self &/or staff)	
Accommodation (self &/or staff)	
Food and drink (self &/or staff)	
Entertainment costs	
Freight costs	
Ground transport	
Display material	
Other expenses (phone, fax, etc)	
Total	

Section D: Satisfaction

20. Using a scale of 1 to 7, where 1 represents ‘very dissatisfied’ and 7 represents ‘very satisfied’ how satisfied are you with the each of the following aspects of this exhibition?

Factors	Very dissatisfied						Very satisfied	
The number of visitors	1	2	3	4	5	6	7	N/A
The quality of visitors	1	2	3	4	5	6	7	N/A
The organisation of the exhibition	1	2	3	4	5	6	7	N/A
Location/accessibility of the venue	1	2	3	4	5	6	7	N/A
Ease of set up of stand	1	2	3	4	5	6	7	N/A
Parking	1	2	3	4	5	6	7	N/A
Space allocation for stand	1	2	3	4	5	6	7	N/A
Truck/lorry access to the centre	1	2	3	4	5	6	7	N/A
Set up scheduling	1	2	3	4	5	6	7	N/A
Dismantling scheduling	1	2	3	4	5	6	7	N/A
Power point supply	1	2	3	4	5	6	7	N/A
Cost of venue	1	2	3	4	5	6	7	N/A
Other facilities at the venue (e.g. exhibitors lounge)	1	2	3	4	5	6	7	N/A
Food and Beverages at the venue	1	2	3	4	5	6	7	N/A
Range of accommodation options	1	2	3	4	5	6	7	N/A
Quality and cleanliness of the accommodation	1	2	3	4	5	6	7	N/A
Value for money of the accommodation	1	2	3	4	5	6	7	N/A
Range and availability of transport to and from the region	1	2	3	4	5	6	7	N/A
Range and availability of transport within the region	1	2	3	4	5	6	7	N/A
Safety and security within the Auckland region	1	2	3	4	5	6	7	N/A
Food and dining opportunities	1	2	3	4	5	6	7	N/A
Opportunities for sightseeing and/or leisure activities	1	2	3	4	5	6	7	N/A
Availability of nightlife	1	2	3	4	5	6	7	N/A
Other (please specify)	1	2	3	4	5	6	7	N/A
Overall satisfaction with this exhibition	1	2	3	4	5	6	7	N/A

21. Using a scale of 1 to 7, where 1 represents ‘definitely won’t’ and 7 represents ‘definitely will’ please circle the response that indicates how likely you are to:

	Definitely won’t	Very unlikely	Unlikely	Undecided / Don’t Know	Likely	Very likely	Definitely will	
	1	2	3	4	5	6	7	N/A
Visit the Auckland region again?	1	2	3	4	5	6	7	N/A
Exhibit at the same event next time it is held?	1	2	3	4	5	6	7	N/A
Recommend the region to colleagues and business associates?	1	2	3	4	5	6	7	N/A
Exhibit at other events in Auckland in the future?	1	2	3	4	5	6	7	N/A

Section D: Personal Details

22. What is your normal place of residence?

____

City/Town   Country

What is your gender?

Female	
Male	

23. What age group do you fit into?

18 – 24 years	
25 – 34	
35 – 44	
45 – 54	
55 – 64	
65 +	

24. How many years experience do you have as an exhibitor?

____

25. Are there any other comments you would like to make in relation to this exhibition?

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Thank you for taking the time to complete this questionnaire.

Appendix H – Delphi Panel Invitation

Dear xxx,
It has been a while since our interview regarding the Meetings, Incentives, Conventions and Exhibitions (MICE) sector in the Auckland region. I have now completed that phase of the project and some interesting discoveries emerged regarding the issues that are currently affecting the sector and what the sector sees as being influential in the future. I am now ready to move to the next phase of this research, and that is to gain consensus regarding the key issues, challenges and opportunities that should be addressed in a strategy document to be developed by Tourism Auckland.
I am writing to invite you to participate in this next phase as a member of a Delphi panel. If you agree to participate, I will email you a questionnaire to complete and return to me no later than 5pm next Wednesday (4 August). This questionnaire will be the first of three you will receive and each will comprise primarily questions on which you are asked to rate your agreement on a scale of one to seven. Each questionnaire should take no longer than 15 minutes to complete, although some questions may require a little thought and/or consultation with others in your organisation. After receiving completed questionnaires from all panel members, I will compile the responses and provide you with a summary of these results along with a new questionnaire to complete.
The panel will comprise approximately 15 individuals, who will throughout the process remain anonymous to each other. Only my PhD supervisor and I will ever be aware of who participated in the panel. The results of this process will be used in developing a report containing recommendations as to what should be included in a strategy for the MICE sector in Auckland.
I know you are busy, but I do hope you can take the time to participate and I apologise for the short notice.
Thank you and I look forward to hearing from you,
Mirrin

Appendix I – Round 1 Delphi Questionnaire

Current Issues – in this section you are presented with a series of current issues that were identified by one or more persons, either through the industry interviews or consumer surveys. You are asked to rank these on how much you believe these to be true statements, where 1 equals not at all true and 7 equals definitely true.

New Zealanders outside of Auckland don't want to travel to Auckland for MICE events.	1	2	3	4	5	6	7
Compared to other New Zealand regions, promotion of Auckland as a MICE destination lacks the 'wow factor'.	1	2	3	4	5	6	7
There is a perception that Auckland lacks activities and attractions.	1	2	3	4	5	6	7
Auckland has a great range of activities and attractions. We just need to educate people.	1	2	3	4	5	6	7
Traffic congestion, lack of parking and inadequate public transport are 'turn offs' for holding MICE events in Auckland.	1	2	3	4	5	6	7
The harbour, beaches, and access to the Hauraki Gulf are great draw cards for holding MICE events in Auckland.	1	2	3	4	5	6	7
There are too many bodies involved in promoting Auckland, it is confusing for consumers.	1	2	3	4	5	6	7
Organisations have been tightening their belts when it comes to MICE events. There are less events being held and events are generally smaller, shorter and less extravagant than they used to be.	1	2	3	4	5	6	7
Lead times for events have reduced significantly in the past five years.	1	2	3	4	5	6	7
The economic climate has led to new business opportunities in markets that would not have previously come to Auckland, such as Australia.	1	2	3	4	5	6	7
The internet has changed the way people investigate and book travel and this has impacted on the MICE sector, especially regarding accommodation bookings.	1	2	3	4	5	6	7
There is a lack of understanding of the sector within government agencies.	1	2	3	4	5	6	7
Government agencies including councils and the police are inflexible in the application of policies.	1	2	3	4	5	6	7
Auckland does a good job of hosting MICE events. Delegates are usually more than satisfied.	1	2	3	4	5	6	7
There is not enough communication between venues and suppliers in the sector.	1	2	3	4	5	6	7
The sector currently doesn't work together well.	1	2	3	4	5	6	7
New Zealand is behind other parts of the world in terms of environmentally friendly practices e.g. recycling.	1	2	3	4	5	6	7
New Zealand is behind other parts of the world in terms of information and communication technology.	1	2	3	4	5	6	7
Auckland misses out on business due to not having a large enough venue.	1	2	3	4	5	6	7

Please briefly explain why you rated these statements the way you did

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Future Opportunities and Challenges – in this section you are presented with a series of opportunities and challenges identified in the previous research. You are asked to rate how much you agree with the following statements, where 1 represents that you totally disagree and 7 represents that you totally agree:

Rugby World Cup 2011 is a great opportunity for Auckland to show we can host large events.	1	2	3	4	5	6	7
There won't be much conferencing in Auckland during Rugby World Cup 2011. People will go elsewhere to meet. It might be a challenge getting them to come back to Auckland.	1	2	3	4	5	6	7
Rugby World Cup 2011 will be a challenge for the MICE sector. It's where a lot of the resources that are needed to host the event will come from and we don't have enough resources.	1	2	3	4	5	6	7
The super city will be good for tourism in Auckland. It will reduce the number of bodies involved and increase coordination for the industry.	1	2	3	4	5	6	7
Auckland needs an international standard convention centre to be able to compete with overseas destinations.	1	2	3	4	5	6	7
We need to work together to market Auckland as an attractive MICE destination.	1	2	3	4	5	6	7
A challenge for the sector is to get event organisers spending again.	1	2	3	4	5	6	7
We need to find a unique selling point that we can use to attract MICE business to the region.	1	2	3	4	5	6	7
We need to find ways to make Auckland more attractive other New Zealanders as a MICE destination.	1	2	3	4	5	6	7
Auckland has a great range of experiences that we can capitalise on to market the region as an incentive destination	1	2	3	4	5	6	7
Finding ways to communicate and share information within the sector will ultimately help achieve a stronger MICE sector.	1	2	3	4	5	6	7
We have plenty of talented and creative people in the MICE sector. People are key are to future success of the sector.	1	2	3	4	5	6	7
Auckland needs to improve our capability to deliver web based, real time content at events. To do this we need high speed broadband capability.	1	2	3	4	5	6	7
We need to ensure that we keep up with technological advancements and ensure that we are utilising new technologies in the MICE events we hold in the Auckland region.	1	2	3	4	5	6	7
We need to focus on becoming more environmentally friendly in the way we go about doing business.	1	2	3	4	5	6	7
We need to encourage MICE event organisers to choose more environmentally friendly options.	1	2	3	4	5	6	7
Developing the MICE sector should be a priority for the region.	1	2	3	4	5	6	7

Please briefly explain why you rated these statements the way you did.

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