

3. SITUATION ANALYSIS SECTION

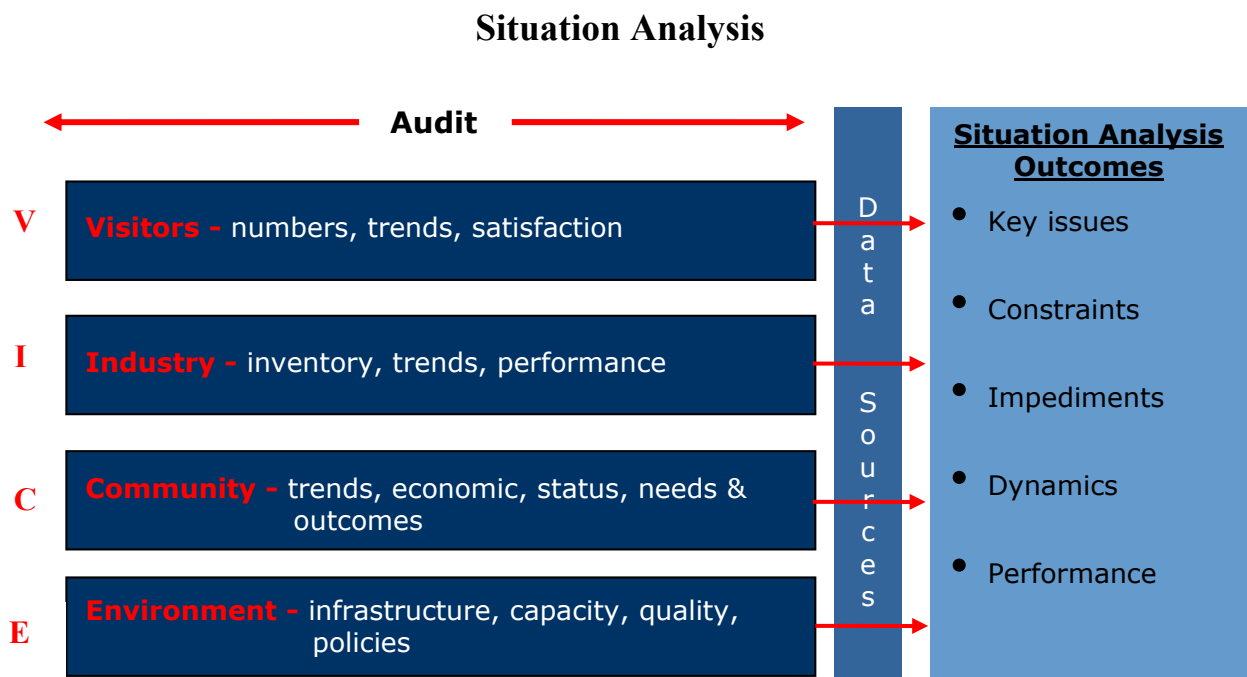
To address specific local tourism issues or to develop a tourism strategy, you first need to ask, “what information do I need and why?”

The Situation Analysis Section includes the following toolboxes, which will help you to answer this question and develop a comprehensive situation analysis:

- 3.1 Visitor Demand Toolbox;
- 3.2 Economic Impact Toolbox;
- 3.3 Tourism Industry Inventory Toolbox;
- 3.4 Visitor Satisfaction Toolbox;
- 3.5 Public Sector Infrastructure Toolbox;
- 3.6 Natural Assets Toolbox;
- 3.7 Community Tourism Toolbox.

These areas are repeated in the Monitoring Performance Section (6.1), with suggested performance indicators for each.

The diagram below identifies the dimensions for a situation analysis using the areas of visitors, industry, community and environment (see VICE model, 1.3), with examples of data requirements in each area.



Complete the checklist below to confirm what information you already have about tourism in your area, and what you are unsure about. The rest of this section will help you fill in any gaps you identify.

Checklist - Key Tourism Information for Local Authorities

Information	Yes	No	Unsure/ Partially
1. The number and type of visitors to the area			
2. The economic benefits provided for your area by visitors			
3. The number and range of accommodation facilities in the area			
4. The number of attractions and activities in the area			
5. The forecast number of visitors to the area for the next five years			
6. The impact on accommodation and attraction requirements from the forecast visitor increases/decreases			
7. The views of visitors on the quality of their experience to the area			
8. The views and opinions of residents in respect to the current levels of tourism in the area			
9. The views and opinions of residents in respect to the forecast levels of tourism in the area			
10. The capacity of current infrastructure and services to cope with existing and future demand from visitors			
11. The impact of visitors on the environment			
12. The level of satisfaction of the tourism industry with maintenance and development of tourism infrastructure and services in the area			

3.1 VISITOR DEMAND TOOLBOX

3.1.1 Introduction and Scope

Effective tourism planning by local authorities, RTOs and businesses requires an understanding of visitor numbers and visitors' use of infrastructure and facilities. This section provides tools for you to check what you know about visitors to your region, and find out how to obtain data about current and future visitor numbers.

The Toolbox follows the standard format (see Tourism Planning Toolkit Structure, 1.2):

- 3.1.1 Introduction and Scope;
- 3.1.2 Why use this Toolbox?
- 3.1.3 Toolbox Resources;
- 3.1.4 Good Practice and Case Studies;
- 3.1.5 Additional Information.

3.1.2 Why use this Toolbox?

Understanding visitor demand will provide you with essential data to plan for future tourism infrastructure needs and develop destination management strategies.

An essential starting point in understanding the needs of visitors is to have a clear definition of what is meant by the visitor industry. In general terms the visitor industry is understood to include international and domestic overnight and day excursionists. These three categories can be further refined as shown below:

International – overnight, day trips;

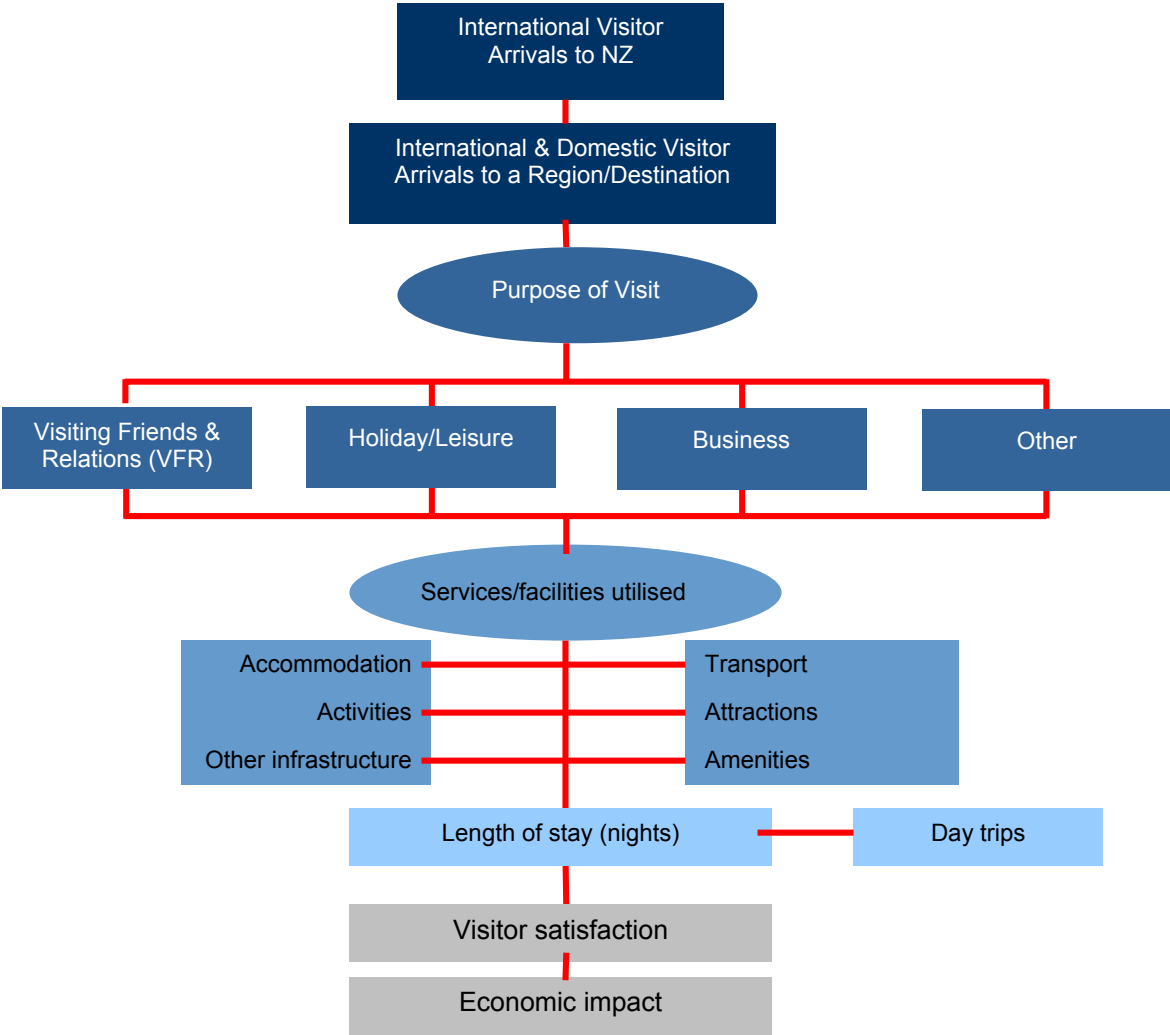
Domestic – overnight, day trips;

Local – day trips.

Without visitors there wouldn't be a tourism industry. It is critical that you understand the characteristics and behaviour of visitors to your area, so that you are able to address issues that exist or may arise in the future. As well as the traditional visitors who visit tourism attractions and undertake activities (eg tramping, kayaking), the visitor market also includes families going to another city for a day to attend a sporting event, people attending conferences and those visiting relations. The definition of 'visitor' is very broad.

The diagram, "Visitor Demand Model for a Destination", indicates the demand components and helps you to answer the questions of who comes, why they come, what services they utilise, how long they stay, their level of satisfaction with their visit and the economic benefit generated.

Visitor Demand Model for a Destination



3.1.3 Toolbox Resources

By completing the checklist about visitor characteristics and behaviour, you can confirm what information you already have, what you need and what you are unsure about. The rest of the Toolbox will help you fill in any information gaps.

Checklist - Visitor Characteristics and Behaviour Information

Information	Yes	No	Unsure/ Partially
1. Trends in visitor arrivals (international) and domestic tourism			
2. The number of international and domestic visitors to your area			
3. The country that international visitors come from			
4. The regions in New Zealand that domestic visitors come from			
5. The reason they are visiting the area			
6. The transport used to reach the area			
7. The type of accommodation they are staying in			
8. The attractions and activities undertaken by visitors in the area			
9. How long they stay in the area			
10. The number of day trips to the area as distinct from those who stay overnight			
11. Seasonality visitor profile for the area			
12. International and domestic visitor forecasts for the area			

a) New Zealand Core Tourism Data Set

There are various agencies that provide tourism-related information relevant to visitor demand. The table below (developed from the Ministry of Tourism's research material – www.tourismresearch.govt.nz) contains details on the core tourism data set.

New Zealand Core Tourism Data Set

Data Type	What it Tells Us	Use by Local authorities	Limitations
<p>1. Tourism Satellite Account (TSA) Provides an official measure of the national economic contribution of the tourism industry</p>	<p>Prepared by Statistics NZ, the TSA utilises a range of data from a number of sources. Through this process a number of key measures of tourism are generated, including:</p> <ul style="list-style-type: none"> ■ Expenditure ■ Direct and indirect tourism value-added expenditure ■ Contribution to GDP ■ Employment ■ GST revenue ■ Export earnings 	<ul style="list-style-type: none"> ■ Comparison of the size and contribution of different New Zealand industries ■ Indicate changes in the performance of the tourism industry 	<ul style="list-style-type: none"> ■ Provides information for whole of New Zealand only, not regions or specific destinations
<p>2. International Visitor Arrivals (IVA) The IVA measures arrivals to New Zealand by international visitors. The data are derived from arrival cards and collated by Statistics NZ</p>	<p>The IVA records the number of short-term visitors to New Zealand and provides a range of information these visitors, including:</p> <ul style="list-style-type: none"> ■ Country of origin ■ Purpose of visit ■ Intended length of stay ■ Age and gender characteristics 	<ul style="list-style-type: none"> ■ Visitor arrival trends ■ Specific market trends 	<ul style="list-style-type: none"> ■ Provides arrival data at key airports and ports ■ Not an indicator of visitor numbers staying in the city/port

Data Type	What it Tells Us	Use by Local authorities	Limitations
	<ul style="list-style-type: none"> ■ Port of entry ■ Seasonal arrival patterns 		
<p>3. International Visitor Survey (IVS)</p> <p>The IVS provides key information on the behaviour and expenditure of international visitors in New Zealand</p>	<p>The IVS provides national level information on a quarterly and annual basis. It covers the measurement of:</p> <ul style="list-style-type: none"> ■ Expenditure ■ Activities undertaken ■ Transport and accommodation used ■ Visitor demographics 	<ul style="list-style-type: none"> ■ Determining visitor numbers to larger local authorities and specific destinations (Auckland, Rotorua, Wellington, Christchurch, Queenstown) can provide essential information to aid destination management and marketing 	<ul style="list-style-type: none"> ■ For most small destinations and local authorities the sample sizes are too small and the information should be treated with caution
<p>4. Domestic Travel Survey (DTS)</p> <p>The DTS measures behaviour and expenditure of domestic travellers within New Zealand</p>	<p>The survey provides quarterly and annual statistics on domestic travel including:</p> <ul style="list-style-type: none"> ■ Day trips and overnight trips ■ Nights spent in individual regions ■ Purpose of travel ■ Expenditure, accommodation and transport used ■ Activities undertaken ■ Traveller demographics 	<ul style="list-style-type: none"> ■ Determining visitor numbers to regions, larger local authorities and specific destinations (Auckland, Rotorua, Wellington, Christchurch, Queenstown) can provide essential information to aid destination management and marketing 	<ul style="list-style-type: none"> ■ For most small destinations and local authorities the sample sizes are too small and the information should be treated with caution
<p>5. Commercial Accommodation Monitor (CAM)</p> <p>CAM measures the capacity and utilisation of commercial accommodation in New Zealand. Statistics NZ produces the CAM, with data collected from a monthly survey of around 3,500 accommodation providers</p>	<p>The CAM generates monthly, quarterly and annual statistics on the following measures:</p> <ul style="list-style-type: none"> ■ Guest nights ■ Capacity ■ Occupancy rates ■ Employee numbers ■ Origin of guest ■ Accommodation types ■ Seasonal and regional patterns 	<ul style="list-style-type: none"> ■ Reliable data at the local authority level in most cases ■ Good indicator of demand and spare capacity ■ Good indicator of trends in terms of both supply and demand 	<ul style="list-style-type: none"> ■ For smaller local authorities details for specific accommodation types may be withheld because of confidentiality due to small sample sizes ■ Does not include non GST registered providers ■ Many B&Bs will not be included
<p>6. Forecasts – National</p> <p>The TRCNZ provides forecasts for the NZ tourism industry. The suite of forecasts provides a seven year forward forecast of expected tourism demand levels</p>	<p>The forecasts cover a range of key measures including:</p> <ul style="list-style-type: none"> ■ International arrivals, nights and expenditure ■ Breakdowns by market and purpose of visit ■ Domestic overnight travel ■ Domestic outbound 	<ul style="list-style-type: none"> ■ Provides trends ■ To date the forecasts have been very reliable indicators of future performance 	<ul style="list-style-type: none"> ■ Cannot account for unknown acts that may influence tourism demand – economic downturns, wars, disease etc

Data Type	What it Tells Us	Use by Local authorities	Limitations
	travel		
7. Forecasts – Regional Regional forecasts establish an expectation of how tourism will be distributed throughout New Zealand and provides a seven year forward forecast of expected tourism demand levels	The forecasts cover a range of key measures including: <ul style="list-style-type: none"> ▪ Reports of tourism activity for each New Zealand region ▪ International arrivals to each region, nights and expenditure ▪ Breakdowns by market and purpose of visit to each region ▪ Domestic overnight and day travel to each region 	<ul style="list-style-type: none"> ▪ Assist with planning of infrastructure and services at the regional and some sub-regional levels ▪ Identify marketing opportunities ▪ Identify potential congestion/overcrowding/ environmental impacts 	<ul style="list-style-type: none"> ▪ Cannot account for unknown acts that may influence tourism demand – economic downturns, wars, disease etc
www.tourismresearch.govt.nz			

b) Gathering Accommodation Data for Smaller Destinations

For smaller local authorities the required information may not be directly available from existing resources and it may be necessary to develop your own surveys. Some RTOs' websites include specific information on visitors to their regions. The table below provides a method of obtaining data on the use of accommodation in your area. It can also be useful in obtaining data where there are many accommodation providers which are not included in the Commercial Accommodation Monitor because their revenue is less than \$40,000 per year (eg bed and breakfast operators).

Method for Developing Visitor Profile for Smaller Local Authorities and Destinations

Information Required	Method	Benefits
Accommodation Data	Develop a monthly survey for accommodation operators in your area to include: <ul style="list-style-type: none"> ▪ Number of rooms ▪ % of rooms sold per month ▪ Origin of visitors ▪ Length of stay 	<ul style="list-style-type: none"> ▪ Provides base data on who visits and over time will indicate trends, peaks and troughs ▪ Can provide feedback to operators which they can use to benchmark their position ▪ Assists in marketing the area to specific visitor/ market types

3.1.4 Good Practice and Case Studies

a) **Lincoln University**

Lincoln University has prepared case studies funded by the Foundation for Research, Science and Technology (Tourism Strategic Portfolio Output), which include information on visitor profiles and characteristics in four different New Zealand locations – Rotorua, Kaikoura, West Coast and Christchurch. The latest study is 'Christchurch and Canterbury Visitor Profile and Forecasts; Characteristics, Attractions and Decision Making: Lincoln University;

Report No 30/2003¹. Details of the reports including methodologies used are available on the web at:

<http://www.lincoln.ac.nz/trrec/trrecpub.htm>

b) Christchurch & Canterbury Marketing (CCM) – Key Tourism Statistics

CCM is the regional tourism organisation (RTO) which has the responsibility of marketing Christchurch and Canterbury to domestic and international visitors. It has over the last few years developed the Key Tourism Statistics (KTS). This provides specific information on the performance of the Canterbury region across a range of tourism indicators applicable to all local authorities – visitor numbers, accommodation, comparison across local authorities and with other major centres (Auckland, Rotorua, Wellington and Queenstown). In addition information is provided on sales through the Visitor Information Centre.

<http://www.christchurchnz.net/canterbury/ktsdetail/>

c) Obtaining Visitor Numbers for Small Destinations

As noted earlier most national data sources can only be broken down to provide a regional picture at best. For tourism planning and provision, especially when peak volumes are a crucial issue (eg for water provision), there is a need to develop reliable measures of local visitor demand.

Akaroa

As part of a study to determine water and waste water usage in Akaroa¹, it was essential to estimate the number of visitors staying in the town during specific periods. In testing demand estimation models at Akaroa, it was discovered that a reliable estimate of demand could be established by four “snapshot” interviews, especially when these could be related to longer term measures (eg CAM, traffic counts). To estimate visitor numbers a three stage approach was undertaken and this proved to be a viable alternative method of determining the number of visitors for small communities.

Stage 1 involved choosing three specific periods and reviewing the Akaroa occupancy rates of the Commercial Accommodation Monitor for these periods.

Stage 2 involved surveys (house to house calls) of resident properties to identify whether they were permanent residences or holiday homes. Surveys were completed of those in residence.

Stage 3 involved a street survey to determine type of visit (eg holiday, visiting friends and relations, business), type of accommodation used and length of stay.

These sets of information were then analysed to assess the degree of correlation and usefulness.

Kaikoura

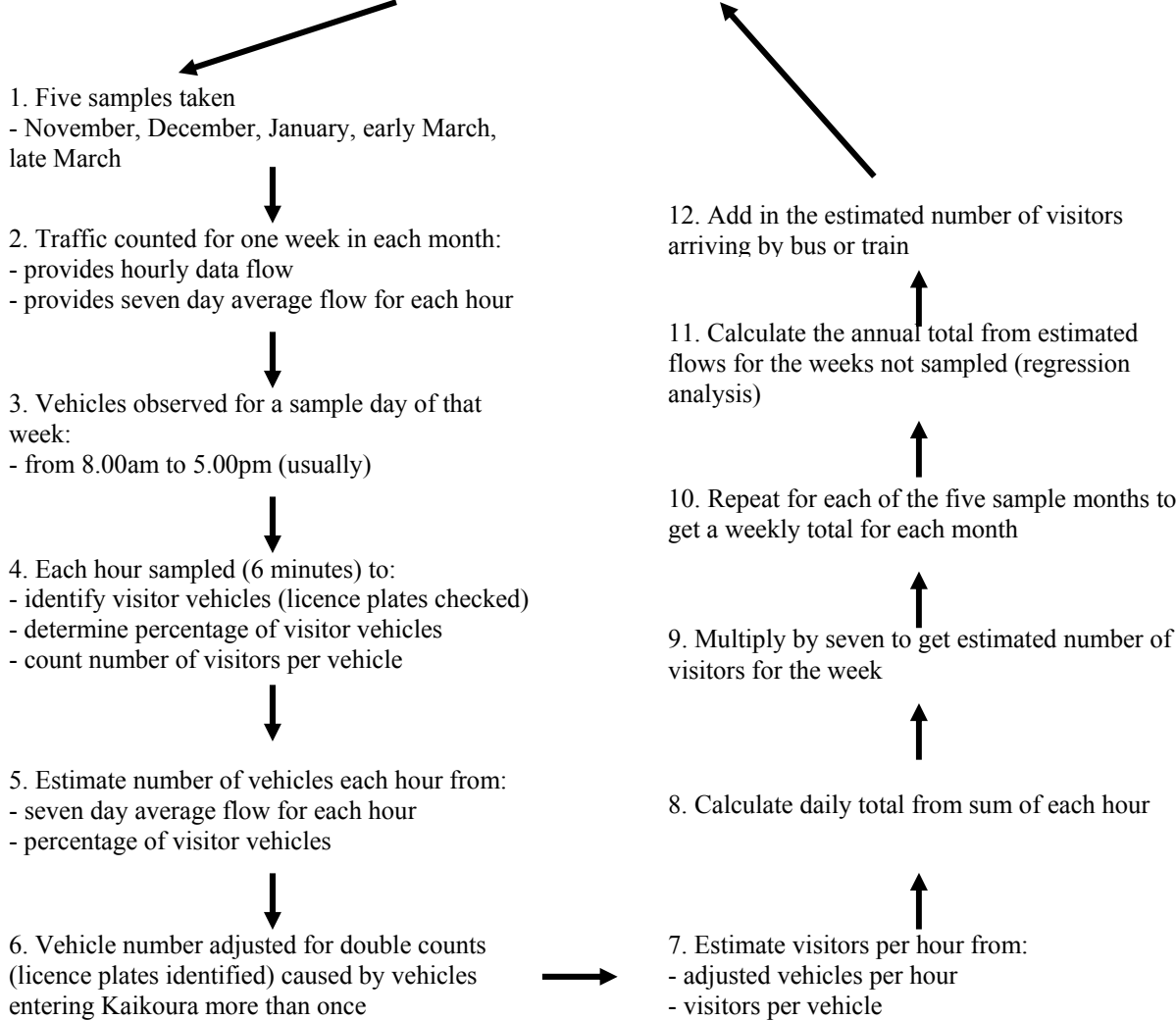
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Tourism: Waste and Water in Akaroa (Kaikoura, Hanmer); Cullen, R., Dakers, A., McNicol, J., Meyer-Hubbert, G. Fairweather, J.R., Simmons, D.G. TRREC Report No 38, Lincoln University, 2003.

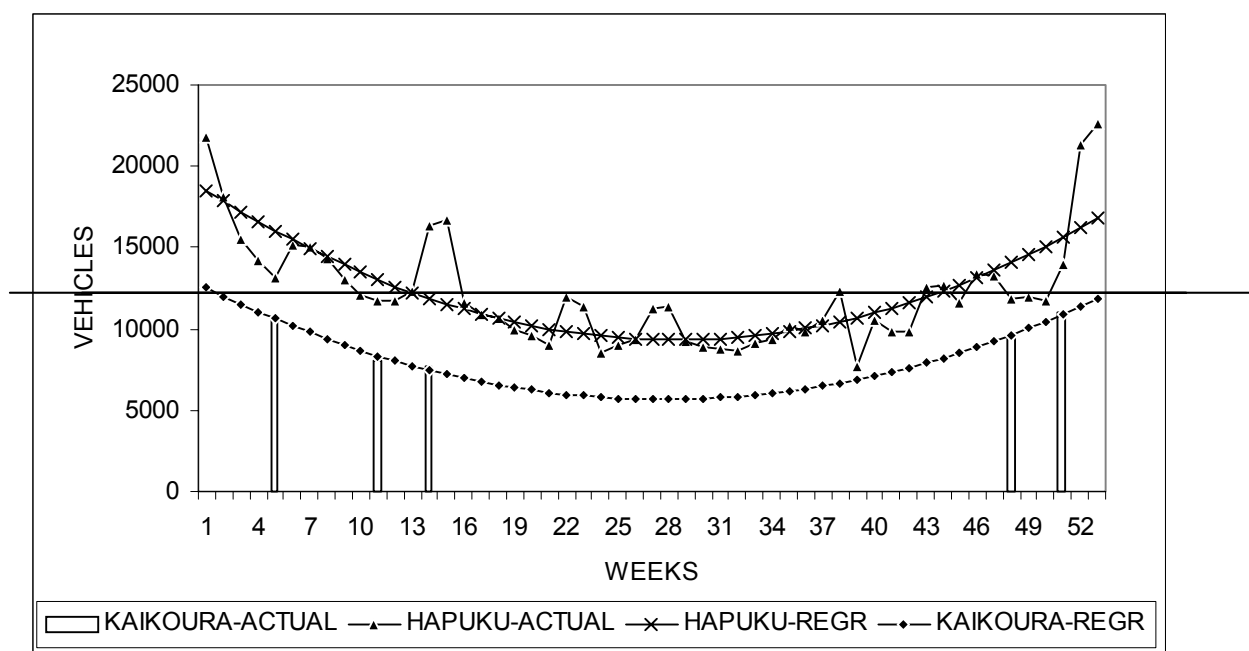
<http://www.lincoln.ac.nz/trrec/trrecpub.htm>

The flow diagram provides a second example of assessing visitor numbers in small communities, taken from Lincoln University’s work in Kaikoura.

Annual Flow of Visitors into Kaikoura



The graph below compares actual Lincoln data recorded and regression data for Kaikoura and Hapuku Transit NZ traffic counters (north of Kaikoura). The graph shows a close correlation between the actual and regression data, indicating that the survey methodology was robust.



3.1.5 Additional Information

TRREC Report No. 2: Estimating the Number of Visitors to Kaikoura Over One Year By Developing A Vehicle Observation Method Fairweather, J.R.; Horn, C.M.; Simmons, D.G, 1998.

TRREC Report No. 3: Summertime Visitors to Kaikoura: Characteristics, Attractions and Activities Simmons, D.G.; Horn, C.M.; Fairweather, J.R, 1998.

TRREC Report No. 12: Visitors to Rotorua: Characteristics, Activities and Decision-Making Moore, K.; Fairweather, J.R.; Simmons, D.G., 2000.

TRREC Report No. 20: West Coast Visitor Report, Moran, D., Sleeman, R, Simmons, D.G., 2000.

TRREC Report No. 30: Christchurch and Canterbury Visitor Profile and Forecasts. Sleeman, R, Simmons, D.G., 2003.

All reports are available through the Lincoln website:

<http://www.lincoln.ac.nz/trrec/trrecpub.htm>

3.2 ECONOMIC IMPACT TOOLBOX

3.2.1 Introduction and Scope

Data on the local economic impact of tourism is very important for councils and businesses. Yet national economic data is often not reliable at the local authority level. This Toolbox provides checklists and survey methodologies to help you calculate the economic impact of tourism in your region.

The Toolbox follows the standard format (see Tourism Planning Toolkit Structure, 1.2):

- 3.2.1 Introduction and Scope;
- 3.2.2 Why use this Toolbox?
- 3.2.3 Toolbox Resources;
- 3.2.4 Good Practice and Case Studies;
- 3.2.5 Additional Information.

3.2.2 Why use this Toolbox?

Knowing the economic value of tourism within a local authority area is important in understanding the benefits tourism can bring to a community. Many local authorities own and manage tourism facilities such as museums, art galleries, visitor information centres, convention centres and events. In addition, local authorities invest in regional tourism organisations (RTOs) to market the region on their behalf.

Once you have obtained information about the economic contribution of tourism, you can use it to:

- Determine the priority for tourism within the local authority as a contributor to the economic development of the region;
- Help evaluate whether current and potentially increased expenditure on tourism facilities and marketing is a sound investment, providing economic and social benefits for residents and businesses as well as for the local authority.

3.2.3 Toolbox Resources

By completing the checklist about the economic contribution of tourism, you can confirm what information you already have, what you need and what you are unsure about. The rest of the Toolbox will help you fill in any information gaps.

Checklist: Economic Contribution of Tourism

Key Information	Yes	No	Unsure/ Partially
1. How many visitors come to the area?			
2. How much do visitors spend in the area and on what?			
3. How many tourism businesses are there in the area?			
4. How many people are employed directly in different types of tourism businesses?			
5. How do other businesses and residents benefit from tourism expenditure?			

6. How much of the money spent by visitors stays in the area?			
7. Regional and national tourism trends/performance			

a) Methods of Measuring Tourism Impacts

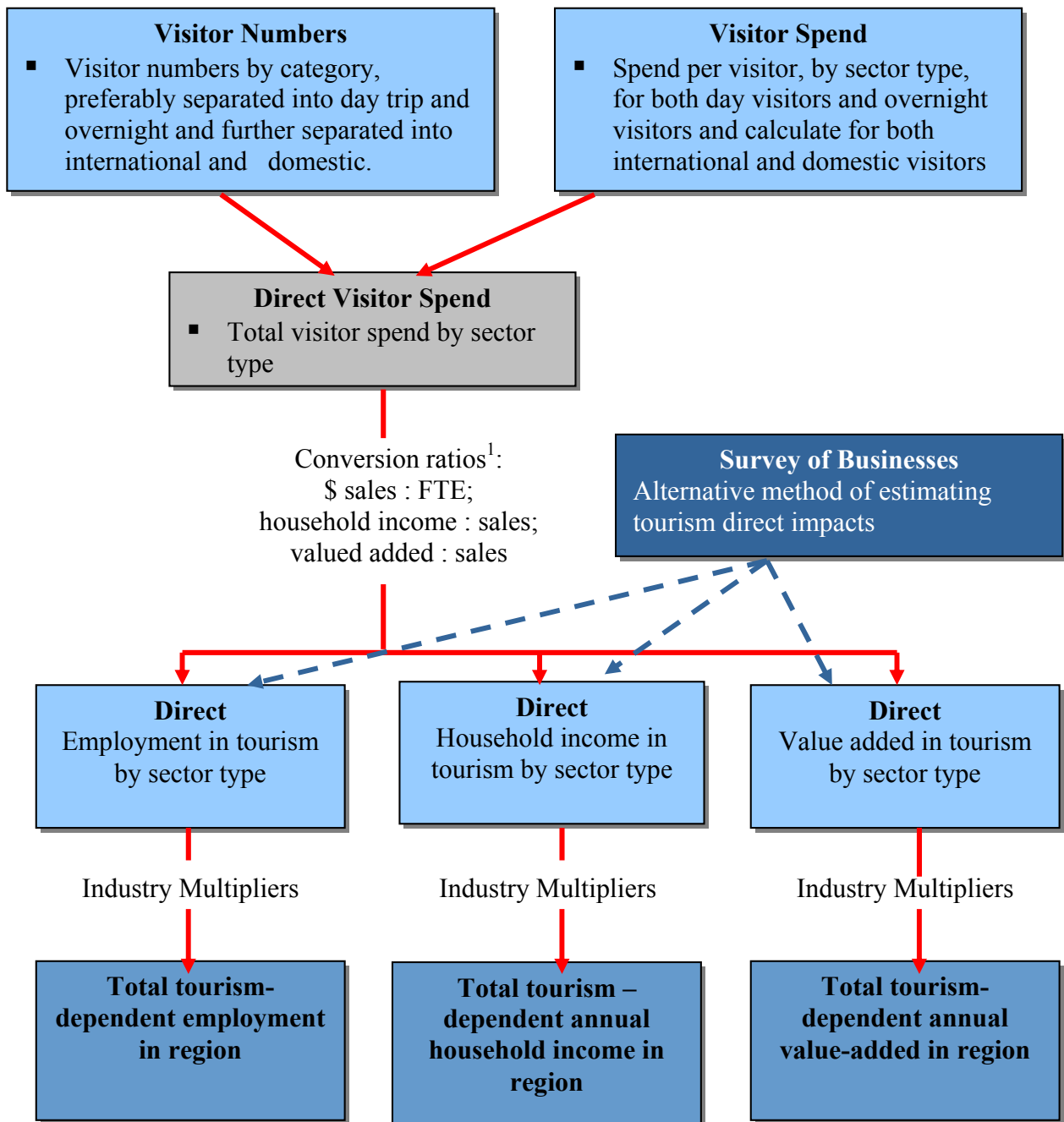
Local authorities require cost-effective ways of measuring both the direct and flow-on impacts of tourism. In this section two methods of establishing direct impacts are illustrated, a source of approximate multipliers is given, and copies of recent questionnaires are provided.

The two approaches to estimating visitor impacts are:

- Direct surveys of visitor numbers and spend, and;
- Direct surveys of business employment and financial ratios.

Both need to be combined with estimates of employment to output ratios, and value-added to output ratios, to give the whole range of direct impacts which include output, employment and value added. The diagram below, “Options for Estimating the Economic Impact of Tourism”, illustrates the two approaches.

Options for Estimating the Economic Impact of Tourism



1. Information on the ratio of employment to output, value-added to output and, household income to output comes from the study input/output models, which in turn are based on a Statistics New Zealand national model.

This is one of the most technical Toolboxes and local authorities may decide that external assistance will be the most cost effective way to obtain the information required.

b) Strengths and Weaknesses of the Visitor Survey Method

The survey of visitors is more accurate than the survey of tourism businesses for estimating visitor expenditure in both small and large centres, and probably also for estimating tourism employment and value-added in large centres. Large centres are likely to have employment : output and value-added : output ratios which are similar to national averages, whereas in small centres this might not be the case.

The weakest part of the visitor survey method is the difficulty in establishing total visitor numbers by visitor type. It is also necessary to survey a large number of visitors to get reliable estimates of average expenditure per person. The survey cost is about \$5 per visitor, or \$10,000 for a sample of 1,000.

In small centres the estimates of employment and value added are also unreliable unless businesses are surveyed to find out their value-added to output and employment to output ratios. This costs around \$15 - 20,000.

(See section 3.7.3 for an example of a visitor survey form to collect data used to estimate the economic impact of tourism on an area). This has been designed for a specific destination and therefore should be used as a guide for developing surveys appropriate to the destination.

c) Strengths and Weaknesses of Business Survey Method

This method provides good measures of direct employment in tourism by industry type, but does not provide a good measure of output or value-added, unless it is supplemented by a more extensive survey of businesses in the region to estimate value added and output per FTE. In reasonably small regions the method is only appropriate where it is practical to visit every business selling directly to visitors and where businesses have a good feel for whether their customers are visitors or locals.

The survey to estimate direct employment costs under \$5,000 in a small – medium sized centre, because it is possible to survey 5 – 10 businesses per hour. A broader survey to estimate value added and output per FTE is considerably more expensive, especially if information on the mix and origin of inputs is gathered, and costs around \$15 - 20,000. It does however have the advantage of giving information which enables the calculation of region-specific multipliers.

d) Estimation of Multipliers

The estimation of multipliers is expensive. As described above a survey of business expenditure will cost \$15 – 20,000 and then the information has to be incorporated into a regional economic model. For small centres with small multipliers, the costs are high for an improvement in accuracy which is unlikely to change estimates of total tourism impacts by more than ten per cent. In our view it is much more cost effective to use a typical GRIT approach (Generation of Regional Input-output Tables – which estimate the source of inputs into regional industries) to estimate multipliers. The cost of this is likely to be around \$2 - 3,000. At present both Butcher Partners Limited in Christchurch and Market Economics Ltd in Auckland provide industry-specific impact multipliers to order.

Hello,

Lincoln University is doing some work to find out the economic importance of tourism to Christchurch and other communities in New Zealand. To do this we need to find out something about visitor expenditure. Would you be able to spend five minutes to answer a few questions?

1. What country are you from?

2. Did you stay in Akaroa Town or District last night or will you stay tonight ?

YES- TOWN	YES – DISTRICT NOT TOWN	NO
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What sort of accommodation did you / will you stay at in Akaroa or the district ?

1	2	3	4
Bed & Breakfast	Commercial Camp Ground (not DOC)	Camp / campervan (not at commercial campground)	Motel

5	6	7	8
Backpackers hostel	Private Home	Hotel	Other (specify)

3. How long have you been in Akaroa until now: days hours

4. How long do you expect your total stay in Akaroa will be: days hours

Interviewer Note for Tables on Next Page:

For overnight visitors who have been here less than 24 hours, we want to be able to adjust their expenditure to a per 24 hours, so get actual hours to date. Some people think of expenditure in some categories on a per trip basis (e.g. accommodation, where they pay at the end). If someone is staying overnight in commercial accommodation but has spent nothing so far or in the last 24 hours, please ask them to estimate what their accommodation expenditure per night will be.

For day visitors we want to rate up their expenditure to date to expenditure per trip, so we need to know how many hours they have been here so far and how many hours they expect to be here in total.

There is a feeling that Akaroa gets only a small part of visitor spending but has to provide a major amount of public facilities (toilets, walks, parking areas etc). So for day visitors only (people who will not stay in town or district for a night) we want to find what proportion of 24-hours of expenditure is spent in Akaroa. This is the reason for the middle column in the expenditure table.

For the following table we want to know how much the average person spends in a day here, and what they spend it on.

- If you are in a group (e.g. family or friends) where spending by one person is not representative of each person (e.g. if one person pays for most of the food or petrol or accommodation), please tell us all the spending by the group;

- If you are on your own, or you pay your own share of joint spending, please tell us only your own spending.
5. How many people does this expenditure cover ?
 6. What is your best estimate of your expenditure (or that of your group) ?
 - a. In Akaroa up until now for each of the following categories ? **For day visitors and overnights who did not stay here last night.**
 - or**
 - b. In Akaroa during the last 24 hours for the following categories ? **For overnights who stayed in Akaroa last night**

#	Category	Estimated Spend (NZD)		
		All Visitors: Spend In Akaroa and District to date or last 24 hours (whichever is less)	Day visitors only: Tourism Spend outside Akaroa and District in the 24 hours prior to your departure from Akaroa*	Total stay.** Only if that is how the respondent wants to give the answer: Note total and number of days: e.g. "\$250 for 3 nights"
1	Accommodation in this town			
2	Travel (excl. international fares)			
3	Food and beverages at takeaway, café, hotel etc			
4	Entertainment / activities / attractions			
5	Petrol			
6	Retail (groceries, clothes, souvenirs etc. etc.)			
7	Miscellaneous / any other spending in this town ***			

* e.g. If they arrived in Akaroa at 9:00a.m. and will leave at 4:00 p.m., how much did they spend outside of Akaroa since 4:00 p.m. yesterday . Do not fill in for those whose day trip is from home to Akaroa.

** Those staying overnight might find it easier to give expenditure on some items for the whole stay – especially accommodation. That is fine. Remember that for those staying at least one night, the objective is to calculate expenditure per 24 hours. If they are staying in commercial accommodation but have not given a

cost for accommodation, inquire about this. If they do not know what the cost will be, code as n.a.

***** Interviewer may recode this to appropriate place. E.g. wine is either hotels and restaurants or retail.**

3.2.4 Good Practice and Case Studies

The Economic Impact of Tourism – Christchurch City and Akaroa

A study undertaken by Lincoln University² highlights the different economic impacts that tourism can bring to an area. The study showed that in Christchurch every direct job in tourism leads, on average, to a further 0.46 jobs elsewhere in Christchurch. In Akaroa, however, each direct job in tourism leads, on average, to only a further 0.15 jobs elsewhere in the Banks Peninsula District economy, and probably only half of those are created in Akaroa. The study indicated that there are high flow-on effects of visitor spending in Christchurch (multiplier 1.81), whereas Akaroa, because of the undiversified nature of the economy, has a much lower multiplier (1.15). Previous studies indicated multipliers of 1.19 for Westland and 1.38 for Kaikoura. Proportionally Christchurch has a flow-on effect of two to three times the other areas because of the diversified nature of its economy. Despite the high level of visitor numbers and visitor nights, Christchurch is the least dependent tourism centre of those studied because of its diversification. Akaroa is the most tourism-dependent centre studied, and major tourism growth or a significant decline would both have very far-reaching effects. To find out more click on <http://www.lincoln.ac.nz/trrec/trrecpub.htm>

3.2.5 Additional Information

Priority Reports with methodological appendices:

TRREC Report No. 37: The Economic Impact of Tourism on Christchurch City and Akaroa Township: Butcher, G., Fairweather, J.R., Simmons, D.G., 2003.

TRREC Report No. 8: The Economic Impact of Tourism on Kaikoura: Butcher, G.; Fairweather, J.R.; Simmons, D.G., 1998.

Other Reports :

TRREC Report No. 17: The Economic Impact of Tourism on Rotorua: Butcher, G.; Fairweather, J.R.; Simmons, D.G., 2000.

TRREC Report 55 No. 26: The Economic Impact of Tourism on Westland: District Butcher, G., McDonald, G., Fairweather, J.R., Simmons, D.G., 2001.

These reports are available through the Lincoln website, at <http://www.lincoln.ac.nz/trrec/trrecpub.htm>

Effects of Tourism Demand on Water and Sewerage Infrastructure in Four Local Authorities; Market Economics Limited, 2003, www.tourism.govt.nz

² TRREC Report 37

3.3 TOURISM INDUSTRY INVENTORY TOOLBOX

3.3.1 Introduction and Scope

Local authorities are inextricably linked with the tourism industry. Local authorities relate to tourism businesses through the services they provide as regulator, planner, funder, facility owner, manager and infrastructure and service provider.

Tourism businesses can be difficult to categorise, since many also operate across other sectors. It is nonetheless important that local authorities are aware of both the demand and supply side of tourism.

The Visitor Demand Toolbox considered the demand side, and this Toolbox looks at the supply side of tourism – the accommodation, transport, attractions and activities available to visitors to your region. It will help you to identify the tourism product which exists in your area, and any gaps and opportunities for development.

The Toolbox follows the standard format (see Tourism Planning Toolkit Structure, 1.2):

- 3.3.1 Introduction and Scope;
- 3.3.2 Why use this Toolbox?
- 3.3.3 Toolbox Resources;
- 3.3.4 Good Practice and Case Studies;
- 3.3.5 Additional Information.

3.3.2 Why use this Toolbox?

To maximise a region's potential for tourism, the local authority needs to be proactive about ensuring it has the products to attract and retain visitors. The local authority is best-placed to perform this function, by using its statutory and non-statutory roles to facilitate the development of appropriate tourism products through the public and private sectors. RTOs' focus is marketing, and their ability to influence the supply, range and quality of tourism product is often limited. So the responsibility rests with the local authority as the enabler, and the private sector as the major supplier of tourism product.

What can a local authority do to meet this responsibility? Essentially, it needs to be aware of levels of demand for all the key elements of the tourism product, like accommodation and transport (see diagram below, in 3.3.3), and be proactive in ensuring that supply can match demand. There are a number of advantages for a local authority in taking a proactive approach:

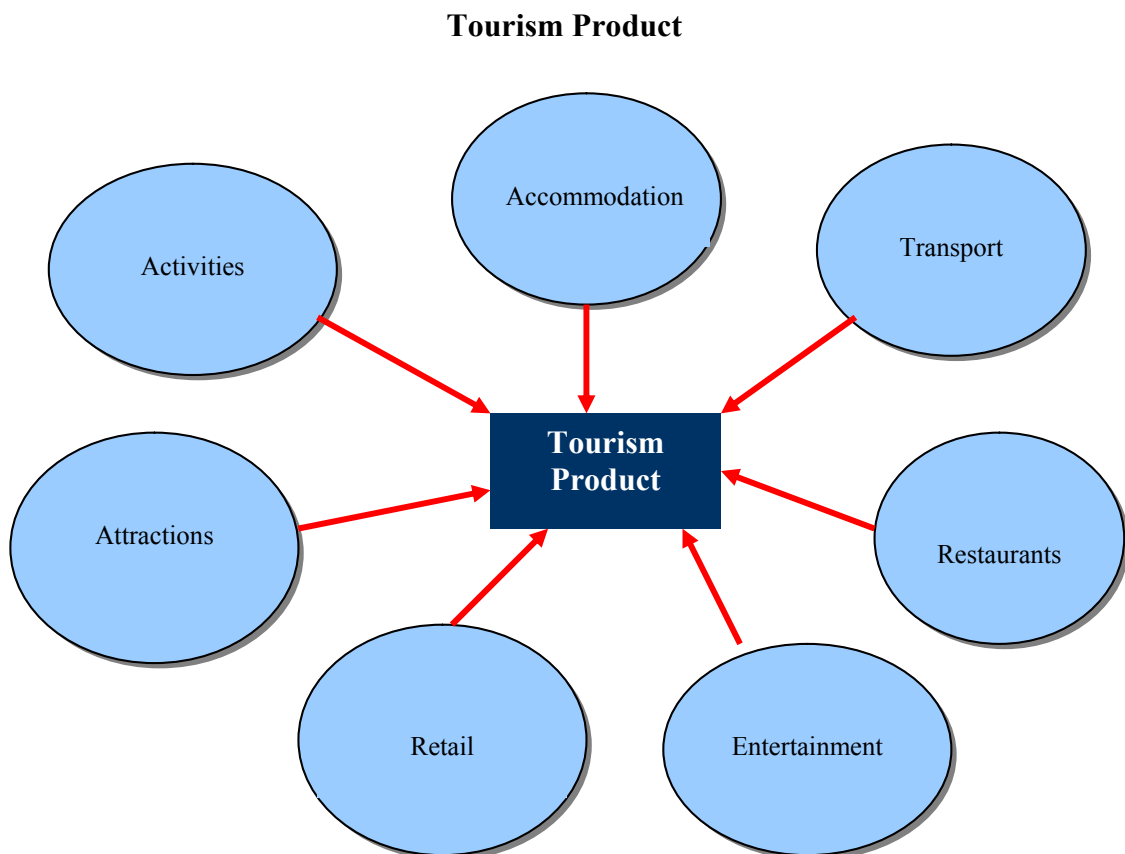
- Where a TLA plans in advance of peak tourism demand, there is an opportunity to shape tourism development in the area. This improves the likelihood of meeting community expectations, rather than simply responding to development pressures.
- In the accommodation sector, the time lag between identifying a need for more facilities and opening new ones can act as a significant brake on tourism's development and potential. This disadvantage is reduced when gaps have been identified in advance and appropriate action taken.

- A similar approach applies for visitor attractions. Where gaps are identified in advance, local authorities can work with the tourism industry, developers and investors to identify market needs, development opportunities and potential sites.

This Toolbox contains checklists for you to review the number, range and quality of tourism products in your area, and identify any gaps.

3.3.3 Toolbox Resources

The diagram below identifies the key elements of the tourism product (supply side).



An inventory of tourism products identifies the opportunities and constraints that a local authority has in attracting visitors to their town/ city/region. Gaps in the product range and/or poor quality facilities will make places less attractive to visitors. Lack of transport and accommodation will deter visitors from travelling to and stopping at the destination. Until an inventory of attractions, activities, accommodation and transport has been completed and matched with an understanding of visitor demand and satisfaction, destinations will be unsure whether they are meeting visitor expectations.

In terms of prioritising tourism requirements, the attraction and activity sectors are the key areas. Visitors come to New Zealand ‘to see and do things’ and it is the attractions sector that provides this opportunity. Local government is often also, a key provider of attractions and amenities for visitors (and residents).

The checklists which follow enable you to complete a tourism product inventory for your region.

a) Checklist: Attractions Inventory

Type of Attractions	No of Businesses
Amusement/theme parks/entertainment complex	
Art galleries	
Historic buildings/sites	
Industry (brewery, winery)	
Māori cultural experience	
Museums	
Natural (glacier, caves, rivers, lakes mountains)	
Nature (zoos/wildlife/aquaria)	
Transport (train, boat trips, plane trips)	
Other	
Total	

b) Checklist: Activities Inventory

Type of Activity	No of Businesses
4WD adventures	
Abseiling and climbing	
Adventures and outdoor pursuits	
Jet boating	
Boating – other	
Bungy jumping	
Canoeing, kayaking	
Caving	
Cycling/mountain biking	
Diving	
Eco tours	
Fishing	
Gliding	
Golf courses	
Horse trekking	
Hot air ballooning	
Hunting and shooting	
Parachuting and skydiving	
Paragliding, hang gliding, parasailing	
Rafting and river surfing	
Snow sports	
Tramping, trekking, hiking, walking	
Other	
Total	

c) Checklist: Accommodation Inventory

Accommodation Type	No of Properties	No of Rooms/sites	No of Beds	Avg No of Rooms
Hotel				
Motel				
Backpacker/hostel				
Farm stay/home stay/B&B				
Caravan/camping sites				

Student accommodation				
Luxury lodge				
Rented accommodation shared flat				
National Park/DoC hut				
Time share/apartment				
Free camping/ campervan				
Other				
<i>Total</i>				

d) Checklist: Transport Inventory

Type of Transport	No of Businesses
Campervan and motor home rentals	
Bus charter companies	
Limousine and chauffeur services/tours	
Rental cars and vans	
Trains	
Launch and sailing charter and cruises	
Ferry and water taxi services	
Coach tour operators	
Air transport	
Other	
Total	

From the inventory it will be possible to identify any obvious gaps in the provision of tourism product. These may need to be addressed in the Strategic Planning Section (Section 4). From the attractions inventory it should be possible to identify the attributes (physical and man-made) that emphasise the local distinctiveness of the area. This will be particularly important in determining competitive advantage and marketing strategies.

3.3.4 Good Practice and Case Studies

a) Lake Coleridge Basin Tourism Group

As part of the development of a strategic plan for the group, it was considered essential to know the extent and condition of the services and infrastructure available. The survey assessed public facilities, food and beverage, shopping and services, accommodation, attractions and activities. The inventory, which is relatively straightforward for a small area, was particularly useful in that it identified the gaps in the range of facilities and services available. An assessment was then made regarding the importance of these facilities and services for the growth of tourism in the area. For more information, visit www.lakecoleridgez.info.

TOURISM INVENTORY PLANNING CHECKLIST

ATTRACTIONS		
Attractions	List Existing Providers/Programmes/Assets for Each Attraction	List Development/Improvement Requirements

KEY OPPORTUNITIES FOR DEVELOPMENT

-
-

ACTIVITIES		
Activities	List Existing Providers/Programmes/Assets for Each Activity	List Development/Improvement Requirements

KEY OPPORTUNITIES FOR DEVELOPMENT

-
-

OTHER OPPORTUNITIES

-
-

ACCOMMODATION		
Accommodation	List Existing Providers/Programmes/Assets for Each Accommodation	List Development/Improvement Requirements

KEY OPPORTUNITIES FOR DEVELOPMENT

-
-

FOOD AND BEVERAGE

Food and Beverage Services	List Existing Providers	List Development/Improvement Requirements

KEY OPPORTUNITIES FOR DEVELOPMENT

-
-

SHOPPING AND SERVICES		
Shopping and Services	List Existing Providers/Programmes/Assets	List Development/Improvement Requirements

KEY OPPORTUNITIES

-
-

PUBLIC FACILITIES		
Type	List Existing Facilities	List Development/Improvement Requirements

KEY DEVELOPMENT OPPORTUNITIES

-
-

b) Community Tourism Planning

The Tourism Industry Association New Zealand (TIANZ), Lincoln University and The Tourism & Leisure Group Limited prepared a document “Community Tourism Planning – A Guide to the Sustainable Co-ordination, Development, and Management of Tourism in Small Communities” The guide provides a range of checklists/ survey forms to assist in the development of tourism inventories. The document can be viewed <http://www.tianz.org.nz/Files/Comm-Guide.pdf> and copies purchased from TIANZ.

3.3.5 Additional Information

Community Tourism Planning – A Guide to the Sustainable Co-ordination, Development, and Management of Tourism in Small Communities; Tourism Industry Association, Lincoln University and The Tourism & Leisure Group Limited. The document can be viewed <http://www.tianz.org.nz/Files/Comm-Guide.pdf> and copies purchased from TIANZ.

3.4 VISITOR SATISFACTION TOOLBOX

3.4.1 Introduction and Scope

A successful tourism industry is based on visitor satisfaction. Failure to meet and exceed visitor expectations will lead to a reduction in visitor numbers and the associated economic benefits to the area.

Local authorities should measure visitor satisfaction, given tourism's role as a growing component of a region's economic wellbeing.

Visitor satisfaction surveys are an important part of information-gathering and can help you to identify the strengths and weaknesses of your area against competing destinations. This Toolbox will help you ascertain whether you have all the information you need about visitor satisfaction with the services available in your region.

The Toolbox follows the standard format (see Tourism Planning Toolkit Structure, 1.2):

- 3.4.1 Introduction and Scope;
- 3.4.2 Why use this Toolbox?
- 3.4.3 Toolbox Resources;
- 3.4.4 Good Practice and Case Studies;
- 3.4.5 Additional Information.

3.4.2 Why use this Toolbox?

Visitor satisfaction is about more than accommodation or activities. Local authorities provide the essential services and infrastructure which enable the tourism industry to operate. If these services are below standard, visitors will not be fully satisfied. This places considerable pressure on local authorities to ensure that the first impressions visitors have of places are positive and that this is carried through as visitors utilise further services.

Visitor satisfaction surveys can provide a useful basis for setting priorities and allocating funding to improve the tourism products in an area. Some destinations in the United Kingdom undertake visitor satisfaction surveys in which results are compared against a set of key criteria. This process, called destination benchmarking, has a number of benefits, including:

- Providing a customer-focused basis for planning and action;
- Helping to identify comparative strengths and weaknesses; under-performance against competing destinations can be a strong influence on decision makers;
- Providing solid grounds for seeking additional resources for a project;
- Raising the profile of visitor management and building support for tourism;
- Encouraging improved standards from external suppliers;
- Building civic pride from positive findings;
- Helping to identify best practice across a range of areas;
- Demonstrating improvement over time against benchmarks and measuring the impact of capital expenditure on visitor-related projects.

3.4.3 Toolbox Resources

What are the services that local authorities should be concerned with and how satisfied are visitors with them?

Complete the checklist on visitor satisfaction information requirements to find what information you have about how satisfied visitors are with services available in your region. The rest of this Toolbox will help you address any information gaps.

Checklist: Visitor Satisfaction Information Requirements

Key Criteria	Yes	No	Unsure/ Partially
1. Quality, range, value for money of accommodation			
2. Ease and cost of parking in the area			
3. Range/choice, quality of visitor attractions and activities to do			
4. Range/choice, quality of service, value for money of places to eat and drink			
5. Range/choice, quality of the shopping environment, value for money of shops			
6. Ease of finding way around – road signs, pedestrian signs, display maps and information boards			
7. Availability and cleanliness of public toilets			
8. Cleanliness of the streets			
9. Upkeep of parks and open spaces			
10. Range and quality of evening entertainment			
11. Overall impression of city/town			
12. Popularity of attractions			
13. Feeling of safety in terms of crime and traffic			
14. Ease of finding, quality of service, usefulness of information received from the I Site/information centre			
15. Things liked most about the city/town			
16. Things that spoil the visit			
17. Likelihood of recommending city/town to others			
18. Improvements like to see			

Despite the importance of visitor satisfaction to the success of destinations, very little research has been completed in New Zealand on how particular destinations meet visitor expectations. One exception is work undertaken for Christchurch & Canterbury Marketing in 2001. This research is described below.

3.4.4 Good Practice and Case Studies

a) *Christchurch and Canterbury Marketing (CCM)*

In 2001 CCM commissioned The Tourism & Leisure Group Limited to complete interviews of almost 600 domestic and international visitors at four Christchurch locations to identify their views on specific facilities and services that comprise the Christchurch tourism product. The summary visitor satisfaction results for Christchurch City are contained in the table below.

Summary of Destination Benchmarking (Visitor Satisfaction) Survey

Facility/Service	Average Score (max 5)
Accommodation	
▪ Quality of service	4.4
▪ Value for money	4.1
City centre car parking	
▪ Ease of parking	3.3
▪ Cost of parking	3.4
Attractions and places to visit	
▪ Range/choice	4.2
▪ Quality of service	4.3
▪ Value for money	4.0
Places to eat and drink	
▪ Range/choice	4.3
▪ Quality of service	4.2
▪ Value for money	4.0
Shops	
▪ Range/choice	4.0
▪ Quality of the shopping environment	4.1
▪ Quality of service	4.2
Ease of finding way around	
▪ Road signs	4.1
▪ Pedestrian signs	4.0
▪ Display maps and information boards	4.0
Public toilets	
▪ Availability	3.7
▪ Cleanliness	4.1
Cleanliness of streets	4.3
Upkeep of parks and open spaces	4.6
Evening entertainment	
▪ Range	3.7
▪ Quality	3.8
Overall impression of Christchurch	
▪ General atmosphere	4.5
▪ Feeling of welcome	4.5
▪ Meeting expectations	4.3
Safety	
▪ Felt safe from crime in Christchurch	4.1
▪ As a pedestrian felt safe from traffic	3.9
Visitor Information Centre	
▪ Ease of finding	4.2
▪ Quality of service	4.2
▪ Usefulness of information received	4.4
Overall enjoyment of visit to Christchurch	4.4
Likely to recommend Christchurch to someone else	4.4

b) Other Studies

Some RTOs have undertaken surveys within which there has been a visitor satisfaction component. These include:

- Auckland – in-depth interviews in Christchurch & Wellington cafes of visitors from the UK, Japan, and China on their perceptions of Auckland;
- Coromandel – annual survey involving expenditure and satisfaction components. The satisfaction survey measures satisfaction with attributes of the region, usage of Pacific Coast Highway and usage of the information centre;

- Southland – a qualitative and quantitative intercept interview capturing expectations before, and opinions after, a visit to Stewart Island.

3.4.5 Additional Information

Christchurch City, Destination Benchmarking Report 2001; The Tourism & Leisure Group Limited (<http://www.lincoln.ac.nz/trrec/trrecpub.benchmarking%20rpt.pdf>)

3.5 PUBLIC SECTOR INFRASTRUCTURE TOOLBOX

3.5.1 Introduction and Scope

The focus of the Toolbox is public sector infrastructure.³ The target audience is infrastructure planners and designers, and managers of the infrastructure services used by the tourism sector. The Toolbox aims to provide information, data and resources for this audience.

This Toolbox focuses on three specific aspects of public sector infrastructure supplied by local government which are essential to New Zealand's tourism industry:

- Water supply;
- Wastewater management;
- Solid waste management.

Tourism can place significant demands on public sector infrastructure. For example in some small communities, like Akaroa, tourism accounts for more than fifty percent of total annual water use. As visitor numbers increase, so does the pressure on services

Each area has a different visitor profile depending on the proportion of holiday homes, day visitors and overnight visitors relative to the permanent population, and on commercial and industrial demands. Different visitor profiles represent different demands on public sector infrastructure. There is also increasing emphasis on providing infrastructural services that meet sustainability criteria.⁴

This Toolbox will help you to estimate visitor use of water, wastewater and solid waste services, so that planning and management can better meet the needs of all stakeholders in the VICE model – visitors, industry, community and the environment (see section 1.3).

The Toolbox follows the standard format (see Tourism Planning Toolkit Structure, 1.2):

- 3.5.1 Introduction and Scope;
- 3.5.2 Why use this Toolbox?
- 3.5.3 Toolbox Resources;
- 3.5.4 Good Practice and Case Studies;
- 3.5.5 Additional Information.

3.5.2 Why use this Toolbox?

Good information about usage of public infrastructure by visitors enables a local authority to better plan for tourism growth. It also allows for informed debate about charging policies for public infrastructure, and helps secure funding for additional infrastructure. Yet few local authorities have the data they need to make quality decisions.

³ It is recognised that there is growing interest in New Zealand in public-private partnerships (PPPs) for the provision of infrastructure – refer to Institute of Professional Engineers NZ Informatory Note 10, December 2002.

⁴ Ministry of Economic Development, Sustainable Development and Infrastructure, November 2003.

This Toolbox contains resources to help local authorities gather data about key areas of public sector infrastructure usage. It recommends that local authorities adopt an integrated and systematic approach to addressing infrastructure issues. Good planning, design and management of infrastructure helps achieve sustainable economic development, efficient services and optimal benefit from the use of public funds.

There are two main reasons why it is difficult for local authorities to estimate accurately the usage of water, wastewater and solid waste disposal systems by visitors:

- The number of visitors to the community is unclear;
- No accurate data on usage of water per visitor, or wastewater and solid waste production per visitor.

Gathering the necessary data is complicated by variations in seasonal visitor patterns and usage of services, and varying levels of usage by different categories of visitor (such as luxury hotel users compared with backpackers). The resources in this Toolbox will help you gather the information you need.

3.5.3 Toolbox Resources

Within this Toolbox are a number of resources that local authorities can use to collect data and provide a better understanding of public sector infrastructure, covering:

- a) Potable water supply and consumption data;
- b) Wastewater services and production data;
- c) Solid waste services;
- d) Data collection;
- e) Snapshot studies;
- f) Private sector infrastructure.

The Strategic Planning Section contains further resources associated with public sector infrastructure, including funding and charging structures, and infrastructure design, planning and management.

a) Potable Water Supply and Consumption Data

There are two ways of obtaining data on water consumption by the visitor sector. These are:

- Using typical consumption data; or
- Field data gathering (refer to [Data Collection](#) section).

Typical data (see below) should only be used for a low-cost desktop study that will enable the investigator to create an approximate quantitative picture of the relative demand tourism places on the town's water services.

The limitations of this type of analysis are:

- Water consumption per guest-night (litres – L/GN) varies between accommodation type, business type and external water demands (eg garden irrigation);
- Peak demand periods are poorly quantified;

- The analysis does not provide sufficient data to enable modelling and improved cost allocation and charging structures.

For more accurate data collection refer to Data Collection section.

There are two approaches to estimate typical water consumption by visitor. These are:

1. Using total guest-nights (GN) for the town and using the consumption values in the table below (refer to Table 1);
2. Using guest-night data for each accommodation category and using typical consumption data (refer to Table 2).

Table 1: Average crude water consumption per guest-night (GN) from two studies (Hanmer and Akaroa – property boundary values. TRREC Report 57, 2004)
www.lincoln.ac.nz/trrec/trrecpub.htm

	Off peak season (winter)	Peak Season (summer)
	For accommodation businesses	
Water consumption, L/GN	175	275
To estimate approximate total L/GN to include service demand due to non-accommodation visitor related businesses add 20% to the above values.		
These values are the averaged crude L/GN obtained from the snapshot studies conducted for Hanmer and Kaikoura . Crude L/GN for each town was the average L/GN of all accommodation provider categories that were measured each day of the snapshot period.		

Table 2: Normalised water demand (L/GN) statistics from three study areas

Accommodation category	Winter		Summer	
	Mean	Range	Mean	Range
Motel	180	75 - 270	260	120 - 1000
Hosted accommodation (B&B)	170	70 - 250	400	70 - 1300
Backpackers	150	70 - 200	180	135 - 300
Camping ground	150	50 - 240	150	100 - 190

Source: (Akaroa, Hanmer and Kaikoura) – TRREC Report 57, 2004
<http://www.lincoln.ac.nz/trrec/trrecpub.htm>

b) Wastewater Services and Production Data

There are two ways of obtaining data on wastewater production by visitors. These are:

- Using typical wastewater production data; or
- Field data gathering (refer to Data Collection section).

As with water usage, typical wastewater data should only be used for a low-cost desktop study that will enable the investigator to create an approximate picture of the relative demand tourism places on the town's wastewater services.

The limitations of this type of analysis are the same as for water usage (see a), above).

There are two approaches to estimate typical wastewater production by visitors. These are:

1. Estimating total guest-nights (GN) for the town and using consumption values in Table 1 below;
2. Using guest-night data for each accommodation category and using typical consumption data in Table 2 below.

Table 1: Average crude wastewater production per guest-night (GN), property boundary values

Wastewater production, L/GN
All season
175

Notes on Table 1:

- To estimate approximate total L/GN to include service demand due to non-accommodation visitor related businesses add 20% to the above values.
- These values are the averaged crude L/GN obtained from the snapshot studies conducted for Hanmer and Kaikoura where crude L/GN for each town was the average L/GN of **all** accommodation provider categories that were measured each day of the snapshot period.
- Source: TRREC Report 57, 2004 <http://www.lincoln.ac.nz/trrec/trrecpub.htm>

Table 2: Normalised wastewater production (Litres/GN) statistics from three study areas (Akaroa, Hanmer and Kaikoura), property boundary values.

Accommodation category	Wastewater L/GN	
	Mean	Range
Motel	180	75 - 270
Bed and Breakfast	170	70 - 250
Backpackers	150	70 - 200
Camping ground	150	50 - 240

Notes on Table 2:

- The property boundary values means the quantity yielded at the property boundary (not at the wastewater treatment plant).
- Source: TRREC Report 57, 2004

c) Solid Waste Services

There is a lack of good information and data on the demand tourism places on a local authority's solid waste service.

The data given in the following table of litres of solid waste per guest night, are average rates based on [snapshot studies](#) done in Kaikoura where a University hostel, a camping ground and one motel were monitored for 7 to 14 days.

Typical Solid Waste/Guest Night

	L/GN
Recyclables	7.0
Rubbish	4.4
Total	11.4

It is very difficult to obtain both typical data and field data on solid waste production from different visitor activities. This is because of the many different solid waste streams and different ways in which they are managed. The waste management streams may consist of some or all of the following:

- Street collection of domestic rubbish;
- Street collection of recyclables;
- Street bin rubbish;
- Community recycling stations;
- Commercial and industrial (tourism and non-tourism) rubbish;
- Commercial and industrial (tourism and non-tourism) recyclables;
- Private collection and transport of rubbish, greenwaste and recyclables to landfill, transfer station or recycling centre.

There are a number of resources which would be helpful to TLAs looking to reduce waste.⁵

d) Data Collection

The quality of data required depends on the nature of the study being carried out. This Toolbox suggests two types of studies as follows:

- A low-cost desktop scoping study to evaluate the overall demand the tourism industry exerts on the town's water, wastewater and waste service.
- A comprehensive study involving more detailed data collection and evaluation of the impact of tourism on the services of water, wastewater and waste.

Desktop Scoping Study

This is a low-cost desktop study that will enable the council or the local tourism industry to create an approximate quantitative picture of the relative demand tourism places on the town's services.

Data required

- Monthly guest-night data for the town from the Commercial Accommodation Monitor (CAM – sourced from the regional tourism organisation or Statistics NZ www.stats.govt.nz);
- Permanent resident population;
- Twelve months of monthly water consumption and wastewater production data for the town.

For details of the methodology for a desktop study refer to TRREC Report No. 57/2004 (see Additional Information 3.5.5).

⁵ Ministry for the Environment, The New Zealand Waste Strategy: Towards Zero Waste and a Sustainable New Zealand, March 2002, <http://www.mfe.govt.nz/publications/waste/waste-strategy-mar02/index.html>. The Zero Waste website www.zerowaste.co.nz. The Redesigning Resources website www.redesigningresources.org. The Waste Management Institute of New Zealand (WasteMINZ) www.wasteminz.org.nz

Comprehensive Study

As a consequence of the scoping study, it may be decided that a detailed study is needed to assist the council in designing an improved cost allocation and charging structure. For details of how to carry out such a study refer to TRREC Report No. 57/2004

<http://www.lincoln.ac.nz/trrec/trrecpub.htm> One of the techniques recommended for collecting micro data is by snapshot studies (see below).

e) Snapshot Studies

Obtaining real micro data for visitor demand on a town's infrastructure such as water consumption, wastewater and solid waste production can be difficult and costly. The demand is seasonal and depends on the nature of the activities of the visitor (for example type of accommodation used).

There are certain services that are shared between visitors and permanent residents; for example restaurants, cafés and visitor attractions. In such circumstances identifying and quantifying the sector demands can be complicated. It is recommended that snapshot studies be used to provide representative micro-level data.

Snapshot studies were carried out in Akaroa, Hanmer and Kaikoura and reported by the Tourism Recreation Research and Education Centre (TRREC reports 38 and 57 <http://www.lincoln.ac.nz/trrec/trrecpub.htm>). The snapshot study method involved four 1-week snapshot studies carried out in the town. The purpose is to obtain the necessary daily data to be able to create a reliable picture of the demand visitors place on the town's water, wastewater and waste services.

Two 1-week studies should be done during the low visitor season and another two 1-week studies during the peak visitor season for the town.

In these studies the specific daily data collected during each snapshot study includes:

- Guest-nights for all commercial accommodation. This information can be obtained by delivering a survey form to each commercial accommodation provider;
- Water and wastewater flows for the whole town;
- Weather conditions, including rainfall;
- Individual water meter readings for representative properties such as:
 - Different categories of accommodation providers,
 - Different categories of visitor related non-accommodation businesses, commercial and community activities;
- Waste production from the different sector sources.
- Information Centre door counts and any other obvious indicator of visitor numbers within the town;
- Quantities of solid waste collected – street bins, recycling bins, rubbish and/or recycling collection, and central transfer/landfill site quantities;
- Where possible, waste quantities from representative individual properties (this may be too difficult to do in some situations).

The people implementing the snapshot studies and collecting the data will gain a very good understanding of how the town's infrastructure operates. This knowledge and information

should be documented and used to inform future planning and management of the town's services and visitor industry aspirations.

g) Private Sector Infrastructure

Infrastructure is provided by both local authorities and the private sector. This toolkit focuses on public sector rather than private sector infrastructure. It is recognised that there is increasing interest in infrastructure services provided by public-private partnerships (PPPs) - refer to IPENZ Informatory Note Ten, December 2002. (http://www.ipenz.org.nz/ipenz/forms/pdfs/Info_Note_10.pdf)

Visitor-related private sector infrastructure normally includes:

- Accommodation;
- Energy supply;
- Public transport – bus, rentals, rail, air, sea;
- Communication, including telecommunication, internet services;
- Entertainment, food and beverage, shopping and other visitor business activities.

3.5.4 Good Practice and Case Studies

a) Tourism, Water and Waste in Akaroa: Implications of Tourism Demand on Infrastructure, TRREC Report 30, 2003.

Lincoln University has been involved in a long term research programme on social, economic and environmental effects of tourism in New Zealand. Because it is small, Akaroa provides an ideal setting to obtain a precise understanding of the impact visitors have on water consumption, solid waste and wastewater production.

The project had three major components. The first two included the quantitative analysis of the impact of tourist flows to Akaroa on the town's water supply, wastewater management and solid waste management services. The project reviewed the present infrastructure in Akaroa and measured tourist flow effects.

The third component was the investigation of the way in which water supply, wastewater and solid waste systems are funded. This analysis considered whether there are alternative funding systems that are more efficient and equitable than present funding systems.

Water, sewerage and refuse services should be priced to reflect their true financial and environmental costs. Most consumers will not be aware of their water costs, as they are just one part of their rate payments. This will encourage the notion of water being a free resource and hence increases opposition to a more explicit charging system.

The report recommends that costs should be allocated among different customers in a systematic manner, that avoids cross subsidies and allocates the full private and social costs to users. Revenue generation should be sufficient for the utility to meet all of the costs of providing its service and should be stable over time. The benefits of a more complex funding scheme should be traded off against higher administrative costs.

b) Effects of Tourism Demand on Water and Sewerage Infrastructure in Four Local Authorities, Ministries of Economic Development and Tourism, 2003

The Ministry of Economic Development and Ministry of Tourism commissioned Market Economics to study the effect of tourism demand on infrastructure in Queenstown Lakes District, Kaikoura, Rotorua and Stewart Island.

The study examined the operating and future capital costs of water and sewerage infrastructure for the 2002/3 year, drawing on Council data to identify the nature of costs and the contribution to funding from each sector. A variety of information sources (including tourism, business activity and Census statistics) and models were used to identify the shares of demand for water and sewerage arising from tourism, including current and projected average and peak season demand, in each area. Operating costs show the cost situation for existing infrastructure, while capital cost is critical in terms of future expenditure, especially to provide increased capacity for community and tourism growth.

The report has:

- Given insight into current and future costs for infrastructure provision to meet tourism demand;
- Highlighted capacity issues for some councils in developing planning and funding policies for infrastructure; and
- Identified other infrastructure issues that councils face in meeting tourism demand.

3.5.5 Additional Information

TRREC Report No. 27: Tourism, Water and Waste in Westland: Implications of Increasing Demand on Infrastructure; Cullen, R., Dakers, A., Fairweather, J.R., Simmons, D.G, 2001, <http://www.lincoln.ac.nz/trrec/trrecpub.htm>

TRREC Report No. 38: Tourism: Waste and Water in Akaroa (Kaikoura, Hanmer); Cullen, R., Dakers, A., McNicol, J., Meyer-Hubbert, G. Fairweather, J.R., Simmons, D.G., 2003, <http://www.lincoln.ac.nz/trrec/trrecpub.htm>

TRREC Report No. 57 : (Akaroa, Hanmer and Kaikoura) – TRREC Report 57, 2004
<http://www.lincoln.ac.nz/trrec/trrecpub.htm>

Effects of Tourism Demand on Water and Sewerage Infrastructure in Four Local Authorities; Market Economics Limited, 2003 www.tourism.govt.nz

3.6 NATURAL ASSETS MANAGEMENT TOOLBOX

3.6.1 Introduction and Scope

Many visitors are attracted to New Zealand by its clean green image and unspoilt natural environment. This trend is likely to continue. International and domestic visitor demand is increasingly focused on specific natural sites. Local authorities are responsible for managing many of these.

This Toolbox will help you to:

- Identify local natural assets;⁶
- Appreciate the significance of natural assets which may be used for tourism in your region;
- Plan for the sustainable management of these assets in a tourism context.

A structured approach by local authorities to managing the impact of tourism on natural assets is essential to ensure sustainability and the continued enjoyment of those assets for both tourism and recreation.

The Toolbox follows the standard format (see Tourism Planning Toolkit Structure, 1.2):

- 3.6.1 Introduction and Scope;
- 3.6.2 Why use this Toolbox?
- 3.6.3 Toolbox Resources;
- 3.6.4 Good Practice and Case Studies;
- 3.6.5 Additional Information.

3.6.2 Why use this Toolbox?

To minimise the impacts of tourism on natural assets, local (and central) authorities need useful information on which to base decisions. Yet despite their importance, many of New Zealand's natural assets do not have specific management guidelines for minimising visitor impacts.⁷

For local governments there are a number of benefits to managing natural assets sustainably, not all of which relate solely to tourism:

- Lead by example in working with the tourism sector;
- Sharpen a council's focus in managing tourism and recreational activities in its region;
- Assist in meeting quadruple-bottom-line reporting objectives;⁸
- Assist in meeting sustainable development requirements of the Local Government Act (2002);

⁶ Natural assets, meaning wildlife and their habitats, areas of native vegetation, remnant landscapes, caves, fossil deposits, beaches, rivers, wetlands and other water bodies, mountains.

⁷ TRREC Report 55 Sustainable Management of Natural Assets Used for Tourism in New Zealand – A Classification System, Management Guidelines and Indicators; Hughey and Ward 2003

<http://www.lincoln.ac.nz/trrec/trrecpub.htm>

⁸ Environmental, social, economic and cultural.

- Reduce the likelihood of litigation and mediation, which tie up council resources.

Sustainable management of natural assets has many broader advantages: helping New Zealand maintain its competitive clean, green image, fulfilling national strategies⁹, and helping the tourism industry remain profitable and effective.

3.6.3 Toolbox Resources

The management of natural assets by local government is a complex issue, and there is little research on the subject to guide councils.¹⁰

A study carried out by Lincoln University over the past three years¹¹ surveyed local authorities throughout New Zealand to ascertain how they managed natural assets over which they had jurisdiction.

The survey received an effective response rate of 46 per cent and from the responses received it is clear that there is no magic bullet solution already at hand. Regional and territorial authorities are not yet at the stage of producing specific tourism impact management plans for natural assets. The survey results show that a number of other approaches are being used to meet this need. It could be useful to develop decision support tools (e.g. checklists, best practice databases) to build on these.

It is also clear from survey responses that any future natural asset management plans need to include specific statements and/or policies relating to tourism and tourism impacts. Almost three-quarters of the respondents considered there was inadequate distinction between tourism and recreation in their plans and policy statements. The methods and approaches, especially the non-regulatory ones, adopted by local authorities are varied and at present there appears to be a horses for courses approach towards tourism impact management.

More research on the management of natural assets in New Zealand, is required, along with the development of guidelines for such things as “outstanding landscapes” which visitors clearly associate with the quality of their tourism experience.

In the interim, there are several options to develop practical decision making guidelines for local authorities. Montgomery, Hughey and Lovell (2004) recommend one or more of the following:

a) Portfolio model

Work from ground up within district or region to create portfolios of natural assets by type and manage them under these groupings e.g., caves, hot springs, outstanding landscapes.

b) Case-by-case best practice cross-referencing approach

⁹ Such as the New Zealand Tourism Strategy 2010 and the New Zealand Biodiversity Strategy.

¹⁰ Other aspects of natural asset tourism management are well-researched, in New Zealand and internationally, such as social aspects of visitor carrying capacity at specific sites, or tourism impacts on whales.

¹¹ A Framework for Best Practice for Local Government Management of Natural Assets Developed for Tourists. Montgomery, Hughey and Lovell, 2004.

Given the diversity of settings and circumstances of local authorities in New Zealand, in the short-term tourism impacts will have to be managed in an adaptive manner. To this extent best practice here means borrowing from what works. These are some options:

(i) Existing methods most favoured by participating respondents-

One of the key findings of the survey was that local authorities favoured different tools and mechanisms or combinations thereof without necessarily differentiating between types of natural assets.

(ii) Local authority database-

With rapid improvements in information technology over the past decade, and given the excellent networking system to be found in New Zealand by virtue of its small size, the opportunity to tap into best practice know-how is considerable. The Quality Planning website (www.qualityplanning.org.nz) is a useful resource that provides relevant best practice, case studies and a publication list of landscape planning.

c) *Stand-alone mixed-strategy checklist*

Another possibility is a more hybrid approach. The following checklist will help you identify options of managing tourism impacts on different natural assets in your region.¹²

Stand-Alone Mixed Strategy Checklist

Attribute	Yes	No	Unclear	Options for action
History of management for visitor impacts already exists				Review existing arrangements Resource consent conditions Stand-alone management plan written
National significance				Central government agencies notified
Regional significance				Regional authorities notified
Local significance				Co-ordination of departments / units within the local authority Relevant local organisations involved Stand-alone management plan written
Involves passive consumption				Minimal impact guidelines produced and distributed
Involves active consumption (High active recreation component)				Significant impact guidelines produced and distributed
Organised groups visiting				Producer / operator guidelines produced and distributed
Informal groups visiting				Consumer / user guidelines produced and distributed
Individuals visiting				Consumer / user guidelines produced and distributed
Similar type of asset already				Adapt Department of Conservation,

¹² In many local authorities there may be no obvious person to undertake natural asset inventory surveys. It is suggested that an asset manager may be the appropriate position to take responsibility for the management of natural assets.

managed by Department of Conservation, Regional Council, etc.				Regional Council methodology
Occupational Safety and Health requirements apply				Mitigates impacts by default – no visitors due to fear of prosecution, or severely restricted access
Built structures, engineering, track, roadworks requiring resource consent				Volumes of visits, types of structures, materials specified to meet impact minimisation targets
District plan significant natural area listing/covenant				Restrictions/terms of covenants
Queen Elizabeth II Trust covenant possible				Restrictions/terms of covenants
Conservation Act (1987) provisions apply				Restrictions / penalties / guidelines
Other legislation (Wildlife Act [1953]; ICOMOS)				Restrictions / penalties / guidelines
Other plans apply: Regional Plans, Coastal Policy Statements, National Policy Statements				Restrictions / penalties / guidelines
Local authority monitoring capacity exists				Relevant section within local authority identified and programme prepared
Owner monitoring capacity exists				Programme prepared with council assistance where appropriate
Third party (e.g., NGO, community member) monitoring capacity				Programme prepared with council assistance where appropriate
Local authority education capacity				Advance visitor guidelines produced with council assistance where appropriate
Owner education capacity				Advance visitor guidelines produced with council assistance where appropriate
Other (please suggest)				

3.6.4 Good Practice and Case Studies

At the local authority level there is a lack of a coherent framework to guide tourism planning for the use of natural assets. There is no ‘best practice’ guide and many councils do not have staff that can be identified directly with tourism except they are in a marketing role.

Examples of the variety of approaches being taken by local authorities in respect of specific assets in their areas include:

a) Auckland City: Hauraki Gulf Tourism

Auckland City Council (ACC) has developed a Memorandum of Understanding (2004) with the Department of Conservation (DoC). The Council sees the economic future of the Hauraki

Gulf as an ecotourism destination. DoC holds about 68 per cent of the Gulf in public ownership, but DOC's core business is the conservation of natural heritage, not the promotion of ecotourism. The purpose of the MoU between ACC and DoC is to identify joint opportunities to get better environmental and economic outcomes in the Gulf through supporting initiatives such as a marine reserve for Great Barrier Island and land rationalisation on Rakino and Great Barrier Island. The Memorandum will also assist in the integration of management functions in the Gulf with regard to weed and pest management, dog control, and the rural fire service.

b) Ashburton District: Lord of the Rings Tourism

A recent tourism/natural asset example is the Lord of the Rings filming that was undertaken at Mt Sunday Island near the Rangitata River. Lord of the Rings has become a worldwide phenomenon, and people want to visit the site. Mt Sunday Island is a prominent geographical feature in the Rangitata River bed approximately one hour's drive from Ashburton. In the District Plan the site is zoned rural C (High Country) and there are relevant rules, objectives and policies for activities in the Rural C zone which address earthworks, vegetation removal and erection of buildings. The filming activity was not provided for specifically in the Plan. However, it was considered as a discretionary activity by virtue of falling within "other activities". Strict monitoring conditions were placed on the resource consent as the site is within a "significant area" and therefore maintaining this environment was very important to the Council.

Non-statutory methods have been employed via the Ashburton District Tourism Board and its move to create a "Tourism Trail" that used the Lord of the Rings site as a focus. This allowed organised groups to visit the site on buses with guides. According to Council this has worked well and has received the approval of several High Country landowners. What had been happening prior to this (and still does to a lesser degree) was that informal visitor groups were driving to the site with little idea of where they were heading. They would then walk to the site from the road. This led to some degradation of the very environment the visitors had come to see.

b) Environment Bay of Plenty: Geothermal Protection

In the proposed Environment Bay of Plenty Regional Water and Land Plan: Geothermal Management Group 1 (GMG1) areas are identified to protect outstanding and rare geothermal features. Any new or increased takes of geothermal fluid are prohibited. The areas are also identified in the operative regional policy statement, which requires their protection. Accordingly, natural assets of importance to the tourism sector which are under increasing threat are being protected through appropriate plan provisions.

3.6.5 Additional Information

Relevant reports and resources for the New Zealand context are relatively scarce. Recent publications include:

TRREC Report No. 55: Sustainable Management of Natural Assets used for Tourism in New Zealand – A Classification System, Management Guidelines and Indicators; Hughey & Ward 2002

TRREC Report No. 55 Chapter 4: Environmental Performance Indicators for Natural Assets used by Tourists; Ulrich, Ward and Hughey 2002

The reports listed above are available through the Lincoln website
<http://www.lincoln.ac.nz/trrec/trrecpub.htm>

A Framework for Best Practice for Local Government Management of Natural Assets
Developed for Tourists. Montgomery, Hughey and Lovell, 2004.

The Environmental Impacts Searchable Bibliography enables easy identification of studies
that have been undertaken in New Zealand and overseas on the biophysical impacts of
tourism and recreation.

See: <http://www.lincoln.ac.nz/trrec/projects/envind/envirlit.htm>

The Quality Planning website: www.qualityplanning.org.nz

3.7 COMMUNITY TOURISM TOOLBOX

3.7.1 Introduction and Scope

Tourism is a visible industry which often appears in the same places and uses the same services as the local community. Tourism in New Zealand is predicted to continue growing, so its associated advantages and disadvantages will become more visible.

Destination management is the key to ensuring that tourism meets both community and visitor expectations, and local authorities are well placed to direct or contribute to this.

This Toolbox provides checklists and survey methodologies to help you identify what information you need about your community's attitudes to tourism in the region, and then to gather it.

The Toolbox follows the standard format (see Tourism Planning Toolkit Structure, 1.2):

- 3.7.1 Introduction and Scope;
- 3.7.2 Why use this Toolbox?
- 3.7.3 Toolbox Resources;
- 3.7.4 Good Practice and Case Studies;
- 3.7.5 Additional Information.

3.7.2 Why use this Toolbox?

Tourism's visibility tends to encourage a high level of community interest, in contrast to agriculture or other industries which often take place out of sight of many New Zealanders. Negative impacts, whether real or perceived, can attract considerable attention.

For local authorities, consultation is important to allow for community input into the planning, management and marketing of tourism. This will ensure maximum benefits and minimal problems for visitors, industry, community and the environment (see VICE model, 1.3). Consultation about a range of issues, including tourism, is also important in meeting the Long Term Council Community Plan (LTCCP) provisions of the Local Government Act (2002).

For local authorities dealing with tourism, effective community consultation can:

- Assist tourism to support a community's economic and social goals (community outcomes);
- Provide confirmation for the local authority that an initiative is appropriate;
- Provide support for new initiatives;
- Increase the awareness of tourism within the community;
- Increase the pride in the destination and what it has to offer the visitor;
- Create a welcoming attitude to visitors.

3.7.3 Toolbox Resources

The diagrams below identify potential positive and negative impacts of tourism for a community.¹³

Potential Benefits of Tourism for Communities



Potential Negative Impacts of Tourism for Communities



The checklist below will help you identify whether you have all the information you need about your community’s attitudes to tourism. (Some local authorities may already obtain this

¹³ See also Benefits and Challenges of Tourism for Local Government, 2.5.

information through annual ratepayer surveys.) The rest of this Toolbox will help you address any information gaps you identify.

Checklist: Community Attitudes to Tourism

Key Criteria	Yes	No	Unsure/ Partially
Community awareness of the economic benefits of tourism			
The impact of tourism on the social structure of communities			
Community views regarding the potential negative impacts of tourism on the environment			
Community consulted regarding tourism developments and investments			

a) Community Views and Opinions

Seeking out and understanding community views and opinions on tourism can be time consuming and potentially expensive. Community views can be obtained through a number of channels:

- Elected representatives – Community Board Members, City/District and Regional Councillors;
- Community groups – residents’ associations, youth and women’s groups;
- Interest groups – recreation, environmental, cultural, heritage groups;
- Industry – not just tourism, but other sectors which may be affected;
- Individuals – people interested in specific issues, but who do not belong to an organisation;
- Iwi – views specific to the local iwi.

The range of issues that these groups and individuals might cover is detailed in the table below:

Potential Community Tourism Issues

Community of Interest	Key Issues
Elected representatives	<ul style="list-style-type: none"> ▪ Views and opinions of constituents ▪ Issues related to public spending
Community groups	<ul style="list-style-type: none"> ▪ Mainly local issues – parking, congestion, developments, provision of services
Interest groups	<ul style="list-style-type: none"> ▪ Specific issues related to areas of interest – access to recreational areas, retention of heritage buildings, environment
Industry	<ul style="list-style-type: none"> ▪ Profitability of business ▪ Issues related to planning and development ▪ Accessible and trained labour force
Individuals	<ul style="list-style-type: none"> ▪ Issues related to individual circumstances – parking, congestion
Iwi	<ul style="list-style-type: none"> ▪ Issues related to land access and ownership, sacred sites, environment

b) Surveying Community Views and Opinions

The methods used to gather community views and opinions will depend on:

- The specific nature of the issue;
- The complexity of the issue;

- The size of the community to be consulted;
- How the information will be used;
- The available budget and timeframe.

The table below lists the range of consultation techniques that may be appropriate for the different types of issues to be addressed.

Consultation Techniques	
Techniques	Appropriate Issues
Telephone survey	<ul style="list-style-type: none"> ▪ Focus on obtaining quantitative information from a large cross section of the community ▪ Broad based issues (eg support for new convention centre)
Postal survey	<ul style="list-style-type: none"> ▪ Similar to telephone survey, but with ability to include more detailed qualitative and quantitative responses
Focus groups	<ul style="list-style-type: none"> ▪ 6-12 people to discuss specific issues to seek a solution (eg options for improving traffic congestion)
Workshops	<ul style="list-style-type: none"> ▪ Similar to focus groups, but generally include more people, working in small groups (eg strategic plan development)
Public meetings	<ul style="list-style-type: none"> ▪ Often used to introduce and/or report back on issues to a larger group of people, limited participation by attendees (eg report back on information obtained from telephone or postal survey)
Exhibition	<ul style="list-style-type: none"> ▪ Used to provide information to interested people before the decision making process is completed. ▪ Generally includes extensive visual material (eg concept plans for a new museum)
Hui	<ul style="list-style-type: none"> ▪ Forum for Māori to share information and discuss views and opinions on specific issues
Tourism Advisory Board	<ul style="list-style-type: none"> ▪ Stakeholder group to manage the consultation and strategic plan development process

c) Sample Sizes

Sample sizes are driven mainly by statistical reasons. Typically there is a need to have 384 respondents to achieve a standard error of plus or minus five per cent in any estimate of a (large) population derived from a sample.

There is no absolute size recommendation - it is just a matter of accepting a larger standard error if the sample is smaller. For smaller populations, like Akaroa, the size can be reduced, but as a rule of thumb reasonable accuracy still requires a sample of about 200 respondents for any small town. This means that for a town of 600 a large proportion of the residents have to be sampled.¹⁴

¹⁴ The exact figures are: if the population is 500, a sample of 217 is equivalent to a standard error of + or - five per cent, if a population is 250 then a sample of 151 is adequate, if 100 then a sample of 79 is required.

d) Statistical Analysis

Comprehensive surveys generally require computer-assisted data analysis to obtain the information required. It is unlikely that comparisons between different variables can be completed successfully without specific programmes (or technical support). Excel™, Access™ and SPSS™ are commonly used programmes.

The surveys included here were designed for specific projects. They are provided as examples that can be used as is, or as a guide to designing your own surveys. To view a resident community survey on community attitudes to tourism click. To view a survey that seeks to obtain ratepayer views on tourism development click.

XYZ Residents' Tourism Survey

Interviewer instructions appear in italics - please do not read these to the respondent.

Introduction

Hello. My name is _____, and I am working for We are trying to find out what the local community thinks of tourism and the visitor industry in

To make sure that we have a random and balanced survey, I need to interview the person in your household (who is at home at the moment) who is 15 years or over and who has the next birthday. Is that you?

If not: May I speak to that person please? *(Repeat introduction if necessary)*

Is it convenient to ask you a few questions? This questionnaire takes about 10 minutes to complete and the answers are kept entirely confidential. We do not even need to know your name

If not: Is there a more suitable time when I could arrange to call you back?

Proceed . . .

If you feel that this person just needs some encouragement to participate:

[Your views are important. We are trying to get the views of many different types of people within the community, so it does not matter whether you feel that you have anything to do with visitors to the area or not. We would still like to hear what *you* think of tourism here in

Please note that this questionnaire is for people who reside in and not for bachowners or owners of holiday homes who do not live in the area

Questionnaire number:	
Date:	

Time:	
-------	--

This questionnaire is in 3 parts. You do not have to answer every question.

THE FIRST SECTION: asks some general questions about living and working in

1) How long, in total, have you lived in

	Years/ months <i>(delete one)</i>
--	--------------------------------------

2) Were you born in

1. Yes	77. <i>Unsure</i>	
2. No	88. <i>Not stated</i>	

3) In which suburb or area do you live?

4) What do you like about living in the

1
2
3
4

5) In the last year, have you worked in any of the following jobs? – tell me as I read them out to you. Please ask the interviewee if they worked full-time (FT=1), part-time (PT=2), or casually (C=3) in any stated job.

- 1. Accommodation (e.g., hotels, motels, backpackers, homestays)
- 2. Transport (e.g., bus/ coach/ taxi driver)
- 3. Restaurants/ cafes/ bars
- 4. Travel agency/ information centre
- 5. Tour guiding or visitor attractions
- 6. Souvenir shops/ arts and craft shops

#	Job Status

- 7. *None of the above*
- 77. *Unsure*
- 88. *Not stated*

6) Does anyone else in you household or immediate family work in any of these tourism-related jobs that I just read out? If no, go to Question 7.

- 1. Yes
- 2. No

- 77. Unsure
- 88. Not stated

b) *If yes, Did they work full-time (FT=1), part-time (PT=2), or casually (C=3) in these jobs?*

	Job Status
Person1	
Person2	
Person3	
Person4	

7) **In the last 12 months, have you had any out-of-town visitors stay at your home?**
If no, go to Question 8.

- 1. Yes
- 2. No

- 77. Unsure
- 88. Not stated

b) *If yes, Were they international visitors or domestic visitors?*

- 1. International
- 2. Domestic
- 3. Both international and domestic

- 77. Unsure
- 88. Not stated

THIS SECOND SECTION of the survey is designed to gauge your overall reactions to visitors and the tourism industry in

8) **In your opinion, what benefits (both for the community and/ or for yourself) are there from tourism and visitors in**? *Record in order as spoken. Please ask interviewee if stated answer(s) represents a community benefit (C=1), a personal benefit (P=2), or both (B=3).*

	Who benefits?
Bene1	
Bene2	
Bene3	
Bene4	

9) **In your opinion, what problems (both for the community and/ or for yourself) are caused by tourism and visitors in**? *Record in order as spoken. Please ask interviewee if stated answer(s) represents a community problem (C=1), a personal problem (P=2), or both (B=3).*

Whose problem?

12) Overall, on a scale from 1 to 4, how often do you meet or come into contact with tourists or visitors in? 1 = never, 2 = rarely, 3 = sometimes, 4 = frequently. *If never, go to Question 15.*

- | | |
|---------------|-----------------------|
| 1. Never | 77. <i>Unsure</i> |
| 2. Rarely | 88. <i>Not stated</i> |
| 3. Sometimes | |
| 4. Frequently | |

13) Using the same 4-point scale, how often do you meet or come into contact with tourists or visitors while you are doing your favourite leisure or recreation activity? *Please ask interviewee to specify activity. If answer to this question is "never", please go to Question 15.*

- | | |
|---------------|-----------------------|
| 1. Never | 77. <i>Unsure</i> |
| 2. Rarely | 88. <i>Not stated</i> |
| 3. Sometimes | |
| 4. Frequently | |

Activity

14) In general, does this contact with visitors detract from, or enhance, your leisure or recreation experience?

- | | |
|--------------------------------|-----------------------|
| 1. Detract | 77. <i>Unsure</i> |
| 2. Neither detract nor enhance | 88. <i>Not stated</i> |
| 3. Enhance | |

15) Are there any places in where you enjoy seeing and meeting tourists or visitors?

- | | |
|---------------------------------|-----------------------|
| 1. Yes (<i>specify below</i>) | 77. <i>Unsure</i> |
| 2. No | 88. <i>Not stated</i> |
| 3. No opinion | |

Enjoy1

Enjoy2

Enjoy3

Enjoy4

16) Are there any places in where you would prefer not to see and meet tourists or visitors?

- | | |
|---------------------------------|-----------------------|
| 1. Yes (<i>specify below</i>) | 77. <i>Unsure</i> |
| 2. No | 88. <i>Not stated</i> |

3. No opinion

Dislike1

Dislike2

Dislike3

Dislike4

17) Are there any types of tourists or visitors that you particularly like or dislike?

Like1

Like2

Dislike1

Dislike2

18) On a scale from 1 to 5, how would you describe the current level of tourism in? 1 = very low, 3 = moderate, 5 = very high.

- 1. Very low
- 2. Low
- 3. Moderate
- 4. High
- 5. Very high

- 77. Unsure
- 88. Not stated

19) Where would you place yourself on the following 5-point scale? One (1) means that “there is far too much tourism now”, 3 means that ‘there is about the right level of tourism now’, and 5 means that “we could do with a lot more tourism”.

- 1. There is far too much tourism now
- 2. Less tourism
- 3. There is about the right level of tourism now
- 4. More tourism
- 5. We could do with a lot more tourism

- 77. Unsure
- 88. Not stated

20) The next few questions use a 3-point scale: never, sometimes, or often.

- 1. Never
- 2. Sometimes
- 3. Often

- 77. Unsure
- 88. Not stated

Have you ever...?

- a. Have you ever changed your shopping times to avoid tourists or visitors?
- b. Have you ever changed your local recreation patterns to avoid tourists or visitors?
- c. Have you ever gone away at busy times to avoid tourists or visitors in?

- d. Do you ever take 'out-of-town' visitors to local attractions? *(If yes, please specify below)*
- e. Do you ever go to local attractions without visitors?

Loc1

Loc2

Loc3

Loc4

THE QUESTIONS IN THIS FINAL SECTION will allow us to check that we have a good cross-section of the community. Some of these questions are personal, but remember that your answers will be kept confidential and you will remain anonymous.

- 21) **What is your gender?** *You should be able to answer this question yourself without having to ask the interviewee.*

1. Male
2. Female

77. *Unsure*

88. *Not stated*

--

- 22) **What age group are you in? – tell me when I reach your age group**

1. 15-19
2. 20-24
3. 25-29
4. 30-34
5. 35-39
6. 40-44
7. 45-49

8. 50-54

9. 55-59

10. 60-64

11. 65 and over

77. *Unsure*

88. *Not stated*

--

- 23) **What is your ethnicity?** *You may have to select the category that best describes the interviewee's stated ethnicity.*

1. European New Zealander
2. Māori *(please state iwi)* _____
3. Pacific Islander
4. Asian
5. Other *(please state)* _____

77. *Unsure*

88. *Not stated*

--

- 24) **What is your employment status?** *You may have to prompt for response.*

1. Employed full-time
2. Employed part-time
3. Self-employed
4. Unemployed and actively seeking work

77. *Unsure*

88. *Not stated*

--

5. Not in the labour force (incl. retired)

25) In the last year, what was your personal income group? – tell me when I reach your income group (*Gross income*)

- | | |
|-----------------------|------------------------|
| 1. Nil income or loss | 9. \$40,001-50,000 |
| 2. \$1-5,000 | 10. \$50,001-70,000 |
| 3. \$5,001-10,000 | 11. \$70,001-100,000 |
| 4. \$10,001-15,000 | 12. \$100,001 and over |
| 5. \$15,001-20,000 | |
| 6. \$20,001-25,000 | 77. <i>Unsure</i> |
| 7. \$25,001-30,000 | 88. <i>Not stated</i> |
| 8. \$30,001-40,000 | |

26) Another part of this study is concerned with face-to-face interviews with residents. Would you be willing to participate in a short follow-up interview at a later date? This would take 20-25 minutes to complete, and would based on the responses you have provided in this questionnaire. A random sample of people who agree to be interviewed will be selected and then contacted accordingly. This interview will take place within the next four weeks.

- | | |
|--------|-----------------------|
| 1. Yes | 77. <i>Unsure</i> |
| 2. No | 88. <i>Not stated</i> |

If yes, What is you name and contact phone number?

Name:

Contact phone number(s):

Thank you for your time and co-operation. Goodbye.

XYZ COUNCIL

XYZ DEVELOPMENT PLAN

SURVEY

How to fill in your response:

- 1. Who should fill out the survey form? The ratepayer. If you pay the rates on more than one property then you will receive a separate form for each property.**
- 2. If you are not a ratepayer, then the representative of the organisation the survey is sent to should fill out the survey form.**
- 3. You will not be personally identified from any of the information that you provide.**
- 4. If you do give your name at the end of the survey form, you will be eligible to enter into a draw for a XXX. If you would like to enter into this draw then all you have to do is fill out the detachable slip at the end of this survey and post it along with the completed survey form in the envelope provided. The prize winner will be notified by telephone by (XXX – add date)**
- 5. Please return your completed survey by**
- 6. Results of the survey will be available by (.....) from at XYZ Council and will also be on the Council's website www.xyz.govt.nz**
- 7. The survey is divided into four parts. In most circumstances all you have to do is tick the relevant box.**

If you would like any further information please do not hesitate to contact

BACKGROUND INFORMATION:

1. Do you live permanently in ?

- Yes
- No (*go to question 3*)

2. If yes, how many other people live at your address with you ?

.....

3. How many days per year do you spend at ?

.....

4. How long have you lived at ?

.....

5. What do you use your property for?

- vacant site
- permanent residence
- bach/ holiday purposes
- industry
- commercial shop/offices
- other: Please state:.....

6. Do you work in the area ?

- Yes
- No

7. If so, what type of industry do you work in ?

- tourism/ hospitality**
- conservation**
- agriculture**
- fishing**
- forestry**
- unemployed**
- other: please state.....**

8. Would you like the area to experience further growth ?

- Yes
- No

9. If so, in your opinion what areas provide the best opportunities for future economic development in the area ?

- recreation**
- tourism/ hospitality**
- agriculture**
- other: if so, please state.....**

OPINIONS ABOUT TOURISM:

Could you please answer the following questions relating to tourism within the area:

		Strongly disagree	Disagree	Agree	Strongly Agree	No opinion
1.	The tourism industry provides many worthwhile employment opportunities for community residents					
2.	Tourism encourages investment in our local economy					
3.	The environmental effects resulting from tourism are relatively minor					
4.	The overall benefits from tourism outweigh the negative impacts					
5.	A good way to manage development in the area is through land use zoning					

6.	The Council should introduce more controls and rules to control development in the area					
7.	The Council should take steps to restrict tourism development in the area					
8.	The area is becoming overcrowded because of too many visitors					
9.	Tourism is responsible for too fast a rate of growth and development in the area					
10.	Our household standard of living is higher because of money visitors spend here					
11.	The area is growing too fast.					
12.	It is important that the community be involved in decisions about tourism					
13.	Decisions about how much tourism and growth we should have are best left to the private sector					
14.	The Council should develop plans to manage the effects of the growth of tourism					

DISADVANTAGES OF TOURISM

Please tick any of the following effects from tourism development within the area:

- traffic congestion**
- feeling of being overcrowded**
- overdevelopment**
- visual effects**
- increase in real estate costs**
- environmental effects**
- no disadvantages**

- other: please state.....**

ADVANTAGES OF TOURISM

Please tick any of the following effects from tourism development within the area:

- employment opportunities**
- business opportunities**
- increase in real estate value**
- overall appearance of the community**
- influx of new residents**

- better recreational facilities
- no advantages
- other: please state.....

If the Council was to become more involved in the future development of, what tasks would you want it to carry out ?

What role can the Council undertake in the area ?

Do you have any other concerns related to visitors or tourism development that were not addressed in this questionnaire?

What is your vision of the Community's future and what role should tourism have in that future?

FUTURE CONSULTATION

The Council is interested in ensuring that the community is actively involved in the future planning for tourism to ensure that proposals meet both economic and social objectives. Would you be interested in taking part in some in-depth discussions with other members of the community and other stakeholders regarding the future growth and development of ? If so, could you please write your name, address, and contact details below:

Thank you for taking the time to fill out the survey. Then all you need to do is to put this survey and the slip in the enclosed envelope and post it.

Name: _____
 Address: _____

Phone: _____

Email: _____

3.7.4 Good Practice and Case studies

a) Punakaiki Development Plan; Buller District Council, 2002

With visitor numbers to the West Coast increasing at a level well ahead of the national average, the Buller District Council considered that Punakaiki residents needed to take a proactive role in determining what facilities and services were required for the future and how tourism should be managed. For the Development Plan, the Council defined the community as including permanent residents, holiday home owners, and businesses (local and those using the area, but located elsewhere). All ratepayers were sent a questionnaire to identify major issues. This information was then collated and used as the basis for more in-depth workshops with the key community groups. With a large number of holiday home owners in the area, a workshop was held in Christchurch to ensure an equal opportunity was given for all community groups to be involved. The results of the consultation (which also included other service providers) were posted on the Buller District Council's web site and the community was encouraged to respond to the findings. Following the development of a strategic plan, the community was again encouraged to make submissions on the recommendations proposed. For references, see 3.7.5.

b) Community Perceptions of Tourism in Christchurch and Akaroa, 2003(Foundation of Research, Science and Technology-funded study)

To determine community perceptions of tourism in Christchurch and Akaroa, a telephone survey was used with residents selected from the 2002 White Pages Telephone Directory. A process of systematic sampling in proportion to the relative population size of Christchurch and Akaroa was employed to select respondents. Specifically, pages and telephone numbers were divided between each researcher and they were asked to telephone every 25th number listed in the Christchurch section and every 4th number listed in the Akaroa section. All letters of the alphabet were covered adequately. Telephone surveyors asked to speak to the person in each household with the next birthday who was aged 15 years or over. The response from the two surveys is detailed in the table below.¹⁵

Telephone Survey Response

Location	Calls Made	Calls Answered	Refusals	Questionnaires Completed	Response Rate
Christchurch	1,703	1,059	672	387	37%
Akaroa	387	159	64	95	60%
Total	2,090	1,218	736	482	100%

In response to the question 'What do you like about living in Christchurch/Akaroa?' the following results were obtained.

What do you like about living in Christchurch?

¹⁵ TRREC Report 34 Community Perceptions of Tourism in Christchurch and Akaroa
<http://www.lincoln.ac.nz/trrec/trrecpub.htm>

	Frequency	%
Size of city	161	42
Unhurried lifestyle	134	35
Access to 'outdoors'	113	29
Community facilities and services	98	25
Family and friends	85	22
Abundance of parks and reserves	80	21
Climate	52	13
Employment	19	5
Other	66	17

Note: Multiple response question. Percentages do not total 100%

What do you like about living in Akaroa?

	Frequency	%
Natural setting (scenery, landscape)	85	91
Peace and quiet	39	42
Village atmosphere	31	33
Unhurried lifestyle	25	27
Climate	11	12
Close proximity to Christchurch	7	7
Family and friends	6	6
Other	5	5

Note: Multiple response question. Percentages do not total 100%

c) Glenorchy – Head of the Lake Community Plan

The Glenorchy Community developed a plan to guide the future direction of the Head of the Lake. The primary purpose of the plan is to provide the community and its representative body (the Glenorchy Community Association) with a framework for decision making, planning and development consistent with the community's vision. Tourism is a component of the Plan because of the natural attractions in the area.

It is intended that the plan sit alongside the District Plan and be given appropriate consideration in decision making. It represents the consensus view of the majority of residents and ratepayers within the community.

It is intended that the plan will be reviewed periodically (10 years, or earlier, should the need be shown) to confirm the direction of the community. It is envisaged that a similar consultation process would be followed.

http://www.glenorchy.com/community/community_plan/community_plan.html

3.7.5 Additional Information

TRREC Report No. 14: Evolving Community Response to Tourism and Change in Rotorua; Horn, C.; Fairweather, J.R.; Simmons, D.G., 2000.

TRREC Report No. 24: Evolving Community Perceptions of Tourism in Westland Moran, D., Simmons, D.G., Fairweather, J.R., 2001.

TRREC Report No. 34: Community Perceptions of Tourism in Christchurch and Akaroa Shone, M., Simmons, D.G., Fairweather, J.R., 2003.

TRREC Report No. 13: Understanding Visitors' and Locals' Experience of Rotorua Using Photographs of Landscapes and Q Methods Fairweather, J.R.; Swaffield, S.R., Simmons, D.G., 2000.

TRREC Report No. 7: The Impact of Tourism on the Māori Community in Kaikoura; Henley, M.; Poharama, A.; Smith, A.; Simmons, D.G.; Fairweather, J.R., 1998.

TRREC Report No. 6: Evolution and Change in Kaikoura: Responses to Tourism Development Horn, C.M.; Simmons, D.G.; Fairweather, J.R., 1998.

TRREC Report No. 23: Visitors' and Locals' Experiences of Westland, New Zealand Fairweather, J.R., Newton, B., Swaffield, S.R., Simmons, D.G., 2001.

TRREC Report No. 35: The Values Associated with Māori-Centred Tourism in Canterbury Zygadlo, F.K., McIntosh, A., Matunga, H.P., Fairweather, J.R., Simmons, D.G., 2003.

Reports are available through the Lincoln website :
<http://www.lincoln.ac.nz/trrec/trrecpub.htm>