

Tourism in Christchurch and Akaroa: Challenges for Planning and Recommendations for Management

David G. Simmons

Professor of Tourism,
Environment, Society and Design Division, Lincoln University
dsimmons@lincoln.ac.nz

John R. Fairweather

Principal Research Officer in the Agribusiness and Economics
Research Unit, Lincoln University
fairweat@lincoln.ac.nz

Michael C. Shone

Research Associate in Tourism
Environment, Society and Design Division, Lincoln University
shonem@lincoln.ac.nz

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Chapter 1

Introduction

1.1 Introduction

This report provides a synthesis of eight separate reports (listed in Appendix 1) on key aspects of tourism in Christchurch and Akaroa, and makes recommendations for the future management of the sector. This case study of tourism in Christchurch and Akaroa constitutes the fourth case study (Kaikoura being the first, Rotorua being the second and Westland being the third) into the evolution of, adaptation to, and management of tourism in New Zealand¹.

The overall goals of the research programme that encompasses these case studies are the improved management of tourism growth, and the development of better guidelines to ensure its sustainability.

The studies focus primarily on the important private/ public sector interface in tourism planning and development. They are not marketing studies *per se* (although significant data are produced to inform marketing decisions) but are focused on public sector responses, and community adaptations to tourism, with a long-term view toward sustainable tourism at the local and national level.

Funding for these case studies has been provided by the Public Good Science Fund.

This introductory chapter describes why the case study area of Christchurch and Akaroa was chosen and states the main objectives of the programme of research. It also provides a brief background to tourism in Christchurch and Akaroa.

1.2 Case Study Selection and Study Objectives

The key criterion in the selection of case study sites to date has been a broad assessment of tourism density². Christchurch has a large number of visitors (both international and domestic) over a relatively large resident population base, whereas Akaroa has a moderately small number of tourists over a very small population base. In addition, Akaroa has a distinctive natural environmental setting upon which tourism depends. Thus, Christchurch and Akaroa provide an opportunity to study tourism in a new setting which features a combination of both low and high tourist/resident densities. While other townships in Canterbury could have been chosen for this case study, Akaroa has in its favour a relatively large stream of tourists, of which a significant proportion are domestic, moving from Christchurch to Akaroa.

Each case study has six objectives which form three main foci. These foci are:

1 Please refer to Appendix 1 for the full list of TRREC publications.

2 Kaikoura represents high visitation over a very small population, Rotorua represents high visitation over a modest population, and Westland represents a modest number of visitors over a relatively small and dispersed population. Christchurch represents the lowest level of tourist/resident density in the four case study areas.

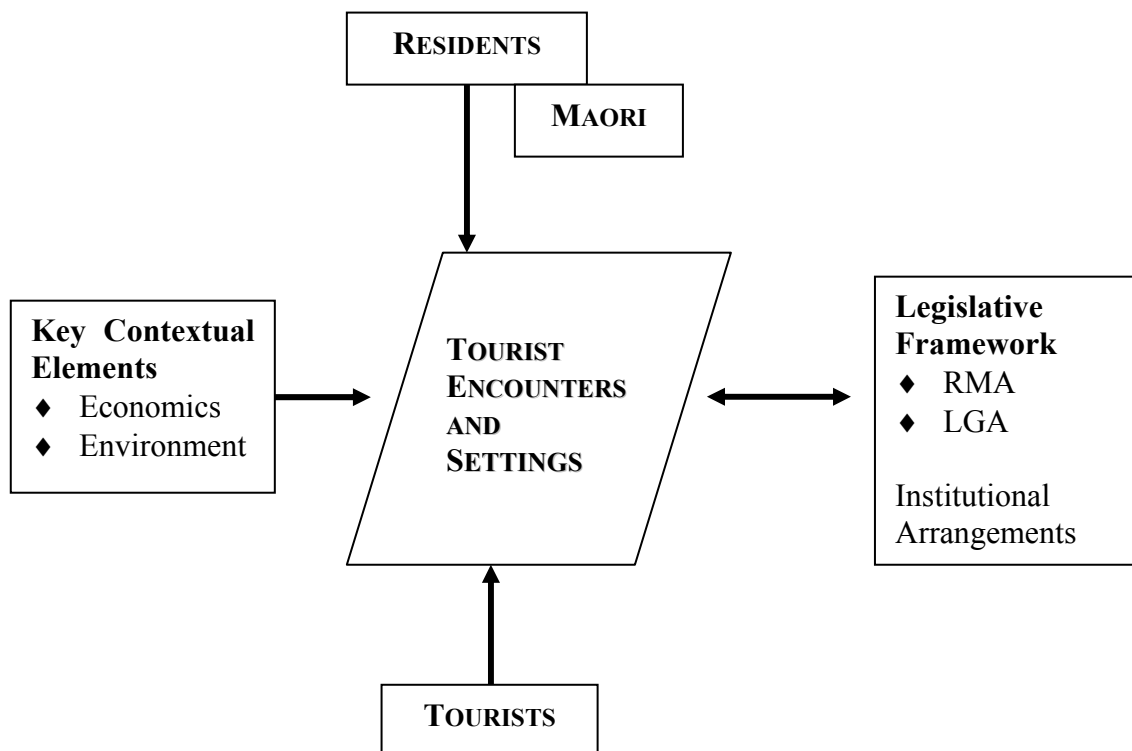
- Community and Maori expectations of, and adaptations to, tourism.
- Understanding tourist demand (in particular, decision making, expectations and experiences, and regional and national flows).
- Understanding the structure of the tourism economy and environmental management systems that shape the host/guest relationship and nature of tourism development.

The myriad of relationships between ‘host and guests’ is well described as being the primary relationship in tourism. Guests (visitors) typically seek unique and rewarding natural and cultural experiences, while the host community typically is involved in providing the essential ‘hospitality atmosphere’ (Murphy, 1985; Simmons, 1994), landscapes, shared recreation experiences and facilities, as well as businesses, that allow tourism to function. At a fundamental level, if tourism fails to meet the needs and aspirations of local residents, the seeds of discontent are sown, resident attitudes sour, and destinations lose their popularity (Butler, 1980; Haywood, 1986).

- The above ‘host-guest’ relationship is mediated significantly by three important features, which are key elements of this study. These are:
- Economic. An understanding of the economic contribution and structure of the tourism sector is required for policy and development purposes. In addition, the economic contribution, and where it occurs, is important because residents who gain financially from tourism have been shown to be more supportive of the industry than those who are not involved with the industry (Simmons, 1988).
- Environments. Tourists are drawn to, and share with residents (and domestic visitors), many natural attractions and features. Tourism can also be a significant source of environmental change, both positive (e.g., conservation advocacy) and negative (e.g., waste management, changes to the built environment) (for a comprehensive review see PCE, 1997). Research is needed both at the site (attraction) level and to address the provision (including cost) of necessary infrastructure.
- Management systems. As our research has progressed (in Kaikoura, Rotorua and Westland) it has become increasingly apparent that the form and style of local leadership, planning and management structures are crucial factors in the outcomes of tourism development and its sustainability.

These objectives and relationships are depicted in Figure 1 and form the basis of the synthesis that follows.

Figure 1
Key Components of the Research



It should be noted, however, that this document provides only a summary of research, and as such omits details that are essential for a full understanding of the topics reviewed. Readers are cautioned against making conclusions about substantive research results without first reading the relevant reports, which are listed in Appendix 1.

1.3 Background to Tourism in Christchurch and Akaroa

Located in the province of Canterbury, on the east coast of the South Island of New Zealand (see Figure 1), Christchurch is a relatively flat city built around two rivers (Avon and Heathcote) that gently flow through its city and suburbs. Situated on drained swamp land at the foot of the Canterbury Plains, the city was laid out in rectangular blocks with a Cathedral site at its centre (Grey, 1994). Christchurch's founding fathers sought to establish a community that mirrored their English origins, and as a result a large number of neo-Gothic stone buildings were constructed. In addition, large tracts of land were set aside for parks and gardens, and it is this legacy that is responsible for the description of Christchurch as 'the most English City outside of England' (Preston, 1995).

Figure 2
Map of Christchurch and Akaroa



Source: Topomap New Zealand Version 2.0 (Scale 1:500,000). Published by Map World Christchurch (2001).

Historically, Christchurch's (and Akaroa's) economy has been based in primary production. Drawing from the surrounding Canterbury Plains, primary production remains a substantial activity in the wider Canterbury area (agriculture is the mainstay of primary production in the Canterbury region) and has significant flow-on effects for economic activity in the city. The secondary sector is strong and represents a significant proportion of Christchurch's economic output (Schöllmann, 1997). While the importance of the primary and secondary sectors are still high, major economic restructuring in the 1980s has resulted in the growing significance of industries such as electronics, information technology and tourism in Christchurch.

Restructuring, a process that became increasingly necessary in the face of international and technological change across the world, is closely linked to the development of international tourism in New Zealand (Horn et al., 1998). Changing markets for New Zealand primary products left the country in need of adding new forms of wealth creation to the traditional economic activities. Tourism was seen to be one of the new forms of wealth creation and it has increasingly become an important part of the Canterbury economy. Through the 1980s and 1990s, tourism was, and still is, widely regarded as one of the growth areas which could create long-term employment to replace that which was lost in the manufacturing and agricultural sectors. As such, Christchurch and Akaroa have restructured some of their economic activities with a focus on tourism and leisure activities. This is connected to a growing importance of tourism to the New Zealand economy as a whole and reflects a global increase in service industries (Schöllmann, 1997).

Presently, Christchurch has a permanent population of 316,227³ and contains over 138,000 rateable properties. It is the largest city in the South Island and the second largest in New

³ Source: 2001 New Zealand Census of Population and Dwellings. Refers to 'usually residents' population.

Zealand⁴. Christchurch's population is predominantly European and, proportionately, the city has fewer Maori and Pacific Islanders than New Zealand as a whole. The city itself covers an area of 45,249 hectares, of which approximately 16,000 are currently in urban use. Often called the most English of New Zealand cities, Christchurch City contains over 650 parks totalling over 3,000 hectares, making it a city with a substantial amount of land used for recreation and open space (Schöllmann, 1997). It is for this reason that Christchurch is commonly known as the Garden City.

Akaroa is located 90 minutes drive away from Christchurch, and is situated within French Bay on the shores of Akaroa Harbour (see Figure 2). Akaroa's physical setting is largely the result of the volcanic origins of Banks Peninsula and subsequent erosion processes that have acted on the landscape. The semi-eroded craters remain today as Akaroa and Lyttelton Harbours. Behind the town, the relatively steep inner slopes of the crater rim forming an imposing backdrop. From the township, extensive views across the harbour to its western shores are afforded and as such contribute to the town's aesthetic appeal.

In recent years there has been a marked expansion of the town's residential areas, growth and subsequent decline of the fishing industry, and ongoing growth in tourism. Although there has been a steady increase in the resident population, the greatest change has been in the substantial rise in the number of holiday homes in Akaroa. The township has also become a popular place for retirement. This increase in demand for housing in Akaroa has had the effect of significantly increasing property values in the town. In addition, this has placed an increasing strain on the infrastructure of Akaroa, particularly on the water supply and sewage treatment system.

Presently, Akaroa is home to a permanent population of 579⁵ people. This figure represents nine per cent of the Banks Peninsula population, and under two per cent of Christchurch's resident population. In addition, there are 1,031 rateable properties in the town. This represents less than one per cent of the number of rateable properties in Christchurch City.

1.4 Report Structure

Summary results from the nine constituent reports are presented in Chapter 2 along with their recommendations for policy. In Chapter 3 the key points from each report are collated and synthesised, and then attention is given to recommendations for policy with a view to supporting the ongoing development of tourism in Christchurch and Akaroa.

4 Source: 2001 New Zealand Census of Population and Dwellings.

5 Source: 2001 New Zealand Census of Population and Dwellings.

Chapter 2

Report Summaries

2.1 Introduction

The following sections present summary data from the eight constituent reports contained within this Christchurch and Akaroa case study. The order of the reports reflects our focus first on visitors and their impacts, second on the responses to tourism from locals (including Maori), and then finally the planning issues associated with tourism. For all but the first report (Report No. 30), the summaries are structured around four topics, namely: objectives, methods, key findings and recommendations. For each report, the key findings are presented in a bolded paragraph at the end of the section.

2.2 Christchurch and Canterbury Visitor Profile and Forecasts (Report No. 30)

This background report presents descriptive data on current, and forecasted, visitors to Christchurch and Canterbury. It notes that reliable data are needed by the industry, developers and those responsible for planning wider aspects of the tourism sector. Generally, these data can be obtained readily from existing sources, however there are substantial inconsistencies in core databases. Tourist data collation is a key role for Christchurch Canterbury Marketing Ltd. (the region's regional tourism organisation [RTO]).

International Market

- In 2001 Canterbury received 0.7 million international visitors generating 3.3 million visitor nights.
- Industry experts predict consistent visitor growth to 2008 when Christchurch will receive 1.5 million visitors generating 8.1 million visitor nights.
- The dominance of the Australian market is expected to decline slightly, while the UK/Nordic market will increase significantly.

Domestic Market

- In 2001, Canterbury received 2.3 million domestic visitors amounting to 7 million visitor nights.
- Industry experts predict annual growth of 3.4 per cent for trips and 2.3 per cent for visitor nights forecasts an additional 397,000 trips and 1,229,000 visitor nights to Canterbury by 2008.
- The South Island provides 74 per cent of all trips to Canterbury.
- Almost 70 per cent of all trips from the North Island come from Auckland and Wellington.

Day Trips

- 90 per cent of all day trips to Christchurch come from Canterbury.
- For Christchurch businesses there are opportunities to ensure that they maximise the day trip expenditure on tourism related sectors (e.g., attractions, retail, food and beverage).

Convention Market

- The convention business is a small part of the total domestic and international visitor market. However, it is a high value market and can be used to promote the area to people who would in other circumstances possibly not consider New Zealand. It is also a market that in the main has a shoulder or low season focus and so spreads the visitor load.

Event Market

- There is insufficient information regarding the event sector in Christchurch and market research to determine its impact and future potential is urgently required.
- With some of the best event facilities in New Zealand a strategic approach to the marketing of the city as an events destination is urgently needed.
- A review to evaluate the placing of events and convention marketing of the city under one organisation should be undertaken.



Visitor Impacts

- There is little doubt that the visitor industry will have a major impact on the future of Christchurch and continue to shape and influence infrastructure and amenity provision.
- The number of additional international visitors to Christchurch forecasted for 2008, in comparison to 2001, averages between 7,500 (May) and 15,700 (December) visitors per day. In 2001, international visitors increased the population of Christchurch, on average by 2.6 per cent. By 2008, this is forecasted to have increased to between 4.5 per cent (off-peak) and 9.4 per cent (peak). Domestic demands are currently 5.8 per cent of the residential population are forecast to grow more slowly (to 6.4%) by 2008, for a total average visitor impact of 13.1 per cent.
- The findings contained in this report indicate that approximately 97 per cent of all international visitor bednights in the Canterbury region are spent in Christchurch. The average length of stay of these international visitors in Christchurch is 4.5 nights. However, the findings also indicate a significant proportion of visitors to Christchurch make daytrips to 'other' destinations within the Canterbury region during their stay. For example, 37 per cent of respondents in Christchurch had visited, or were intending to visit, Akaroa during their stay in Canterbury. Kaikoura (36%) and Hanmer Springs (27%) were also popular daytrip destinations for visitors to Canterbury. This suggests the presence of regional disparities as the costs and benefits associated with tourism development and operation in the Canterbury region are borne and accrued disproportionately. Specifically, Christchurch appears to be a 'net gainer' in economic terms, while peripheral regional communities experience varying degrees of day and overnight visitation.
- The impact on infrastructure requirements to meet accommodation needs and other services will require serious consideration by the Christchurch City Council in particular.

For small resort destinations such as Akaroa, Hanmer Springs and Kaikoura⁶ the impact will be even more significant as the base number of residents is lower and therefore visitors make up a higher proportion of the population on a daily basis. The impact of domestic tourism in 2008 on infrastructure will be less than the international market because almost 51 per cent of all visitor nights will be spent in private homes of friends and relatives. There will be approximately 2,136,000 additional international and domestic visitor nights in Canterbury. Again it is the smaller destinations that will be under more pressure.

- The increase in visitors will create in Christchurch increased demand for central city land or buildings suitable for conversion to meet accommodation needs.
- With increased visitors there will be additional business opportunities to meet the needs of visitors. Specifically it will be important that the things 'to see and do' (attractions/activities) meet the needs of an increasingly sophisticated and discerning visitor market. A review of the attractions and activities sector to ensure that they meet visitor needs and identify gaps will be essential if Christchurch and Canterbury are to remain competitive destinations.
- The increased visitor numbers will at certain times and at certain attractions create congestion and potentially a diminished visitor experience. This will need to be monitored and strategies developed to better manage the visitor experience.
- Christchurch is likely to experience increased visitor traffic as the FIT market grows and campervans/rental cars are the preferred transport options for this visitor segment. The impact will affect car parking provision.
- Further increases in the English Language market are likely to create additional racial tension with certain sectors of Christchurch community and specific strategies need to be developed to minimise this impact.

Recommendations

Based on these data on visitor numbers and forecasts we recommend:

- A review to evaluate the merits of having events and convention marketing under one organisation.
- That attractions and activities are regularly reviewed to ensure that they meet the needs of visitors, especially for high demand attractions at which congestion is possible.

Canterbury is a destination which currently has more than 735,100 international visitors per year (3.3 million bed nights) and 2.3 million domestic visitors per year (7 million visitor nights). Taken together the above visitor categories amount to over 10 million visitor nights per year in Canterbury. Approximately 97 per cent of all international visitor nights in the Canterbury region are spent in Christchurch. A significant number of visitors make daytrips to 'other' destinations within the Canterbury region. This suggests the presence of regional disparities as the costs and benefits associated with tourism development and operation in the Canterbury region are borne and accrued disproportionately. For international visitors an increase in visitation and volume (bed nights) slightly in excess of 50 per cent is anticipated by 2008. Domestic visitation is forecast to grow more slowly at 3.4 per cent per year during the same period to generate a 26 per cent increase in visitors. Significantly, by the peak visitor month of December 2008, visitors are expected to equate to 9.4 per cent of the resident population in Christchurch (compared to 2.6% in 2001).

⁶ Tourists are already estimated to generate 38 per cent of service requirements in Kaikoura (Source: McNicol, Shone and Horn, 2002).

2.3 Visitors to Christchurch: Characteristics and Decision-Making (Report No. 32)

2.3.1 Objective

The overall objective of the research presented in this report was to provide base data on the decision-making processes of visitors to Christchurch, New Zealand. In particular, this study was designed to investigate information sources and timing of itinerary planning and decision-making. In addition, the study was concerned with understanding the ranking of Christchurch, for visitors, as a recommended destination within New Zealand.

2.3.2 Methods

One survey instrument was used to collect the data. Data collection occurred during two sampling periods: 25 September to 10 December 2002, 4th January to 9th February 2003. A quota sampling design was used based on previous years' visitors' data from the International Visitors Survey and Domestic Tourism Monitor/ Domestic Tourism Survey. Selected sites for surveying were in the centre of Christchurch and included the Arts Centre, Cathedral Square, Victoria Square and Cashel Street Mall. Surveyors approached passers-by, introduced themselves and, when consent was given, conducted the survey. From the two sampling periods a combined total of 930 questionnaires were completed of which 731 were of visitors to Christchurch and it is these latter that formed the basis of this study. The remaining 199 were from locals who had had visitors stay with them in the previous three months.

2.3.3 Key Findings

A majority of the visitors as indicated by our sample to Christchurch were female (54%) and international in origin (90%). Of the overseas visitors (n=648) 81 per cent had not previously visited New Zealand. The largest group type was 'those visiting alone' (38%) and the predominant age groups were 20 to 24 years old (20%), 25 to 29 years old (17%) and 30 to 34 years old (13%). Our sample was biased towards international visitors despite attempts to quota sample according to known volumes of international and domestic visitors.

Some 52 per cent of visitors believed they had less than adequate knowledge of Christchurch prior to arrival, with those visiting Christchurch as a sole destination the most likely to report higher than adequate levels of prior knowledge (26%). Despite a majority reporting less than adequate levels of prior knowledge a total of 70 per cent did not believe that they needed more information about the region prior to the trip. Nevertheless, the greatest desire for more information was from those who had either no prior knowledge of the region (39%) or some, but less than adequate, knowledge (40%). Not surprisingly, domestic visitors to Christchurch were the least likely group of visitors to desire more information (17%), closely followed by visitors from Germany (17%). Visitors from Asia reported the greatest demand for more information prior to arrival (55%) followed by visitors from the United States (40%).

The most common recommended length of stay in the Christchurch region during a suggested scenario of a one-month stay in New Zealand was three to four days (45%) followed by 'about one week' (27%) and one to two days (23%). Those travelling to Christchurch as a sole destination gave the lengthiest recommendations with 16 per cent recommending 'at least two weeks' and a further 30 per cent recommending 'about one week'.

When recommendations were based on a scenario of a one-month trip in the South Island (rather than the whole of New Zealand) there was a marked increase in the recommended

lengths of stay. Under this scenario, some 15 per cent recommended 'at least two weeks', 36 per cent recommended 'about one week' and 38 per cent recommended three to four days.

Some 65 per cent of respondents claimed to have no disappointments with Christchurch while three per cent mentioned the weather, two per cent 'shopping' and one per cent 'unfriendly people'. The remaining disappointments were expressed by seven or fewer respondents (i.e., less than 1% of the sample).

The decision to travel to Christchurch was overwhelmingly made while still at home (90%) but the planning of Christchurch stay itineraries was carried out mainly at home by 50 per cent of the sample and mainly while travelling in New Zealand by 43 per cent. Visitors from 'other Europe' (34%) and Germany (35%) were the least likely to plan their Christchurch itineraries while still at home, domestic visitors were the most likely (82%).



Some 76 per cent of overseas visitors planned their New Zealand itineraries while still at home but this tendency was least pronounced in the younger age groups (70% of 15 to 24 year olds and 68% of 25 to 34 year olds). Once again, those from 'other Europe' (65%) and Germany (71%) were the least likely to have planned their New Zealand itineraries while at home.

Advice from friends and family (63%) and not having visited New Zealand before (59%) were the most often cited influence on overseas visitors' decisions to visit New Zealand. Travel books also rated highly (34%) but the next most cited information source from the industry was travel brochures, at only 14 per cent of respondents. Interestingly, the Internet was cited as an influence by 22 per cent of overseas respondents. These findings confirm a trend reported in previous related studies that show an emphasis by respondents on informal sources of information and those sources that can be controlled by the user and/or are portable (e.g., travel books).

A similar pattern was found for influences on the decision to visit Christchurch. Once again, advice from friends and family was the most often cited influence (42%) and not having visited Christchurch before was next most cited at 36 per cent. However, Christchurch's use as a convenient stopover was cited by 29 per cent of respondents perhaps reflecting the 'gateway' perception of Christchurch as a destination.

2.3.4 Recommendations

Policy implications emphasise the marked differences between those for whom Christchurch represented a 'gateway' or 'stepping stone' function and those for whom Christchurch was a sole destination. The latter group is likely to have distinct needs and demands, perhaps similar to those of locals. Their commitment to the region suggests these needs should be a focus wherever possible. Also, it was noted that recommended lengths of stay are connected to overall trip length. The more that longer overall trips throughout New Zealand can be encouraged the more that word of mouth recommendations will include longer stays in the

Christchurch region. Locally available, portable and interactive types of formal information sources were recommended as those most likely to result in influence on the decision making process of visitors, especially in the formation of on-site itineraries.

The majority of visitors to Christchurch were international, had not visited before and were young. A slight majority of visitors reported less than adequate prior knowledge of Christchurch, but 70 per cent did not believe they wanted more information prior to the trip. Interest in information varied among the different international groups of visitors. For a scenario of a one-month stay in New Zealand, most visitors recommended a three to four day stay. Nearly two thirds of visitors reported no disappointments with Christchurch. Ninety per cent of visitors made their decision to travel to the city before leaving their country of origin. The planning of Christchurch stay itineraries was undertaken at home by only 50 per cent of these visitors, with a further 47 per cent planning their Christchurch itineraries while in New Zealand. The most often cited influence on international visitors decisions to travel to Christchurch were 'advice from family and friends' (42%) and 'not having visited Christchurch before' (36%). In addition, the 'convenience' of Christchurch as a tourist stopover was cited by 29 per cent of respondents, reflecting the gateway function of the city for many tourists.

2.4 Visitors' and Locals' Views of Environmental Management in Christchurch, New Zealand (Report No. 33)

2.4.1 Objective

The objective of the research presented in this report was to develop an understanding of visitors' and locals' views of environmental management in Christchurch.

2.4.2 Methods

A total of 63 people were selected in a diverse, non-random sample with roughly equal proportions of men and women, and including 21 overseas visitors, 33 domestic visitors and 22 local people. Each subject sorted a pre-selected set of photographs into nine piles, ranging from those that represented good environmental management to those that represented poor environmental management, to create their own Q sort. All Q sorts were factor analysed to identify three factors or views on environmental management. Subjects' attitudes, beliefs and expectations in making their selections were recorded during the interviews and provide an additional basis for interpreting the three different factors.

2.4.3 Key Findings

The results identify three factors or ways of defining environmental management in Christchurch.

Factor 1, **City Beautiful**, defines good environmental management as management for public enjoyment or use. This factor represents a preference for environmental management that maintains well-vegetated, clean and tidy urban settings that correspond to traditional notions of design aesthetics. Overall, this factor characterises good environmental management as that which maintains an aesthetically pleasing, cared for, and essentially cultured urban landscape.



Factor 2, **Untouched Nature**, defines environmental management in terms of preservation of natural-looking sites within the city. Overall, this factor characterises good environmental management as minimising human influence of any kind, irrespective of design quality or level of care.

Factor 3, **Clean and Green**, views good environmental management as conserving the health and quality of water and vegetation, and to a lesser extent creating environments that have a public use. This factor emphasises the importance of ecological health and integrity as primary indicators of good environmental management. Respondents' comments emphasise the importance placed upon the presence of green and tall vegetation, clean water, and cared for environments.

2.4.4 Recommendations

Based upon the results of this study, we recommend the following priorities for environmental management in Christchurch.

- Focus upon clean air, clean water and well-designed public spaces that include tall trees.
- The goal of clean water needs to be supplemented by continued public education about the indicators that characterise clean water.
- Equal attention needs to be given to the cultured landscape (buildings, streets, parks) and to natural areas in the city.
- Cleaning up degraded industrial and commercial sites and artefacts.
- Increasing the presence of trees (especially tall trees) and vegetation in parks and streets to maintain the city character in the face of intensification of development.
- That the cared for Garden City Beautiful ideal is continued, along with the additional ideals of the Untouched Natural City and the Clean Green, ecologically healthy City.

Visitors and locals have identified three factors or ways of defining environmental management in Christchurch. These factors are characterised as ‘city beautiful’, ‘untouched nature’ and ‘clean and green’. Similarities between these results and those from earlier case studies suggest that the results are robust. Based on these findings, and given a consensus on core environmental preferences, attention to design and facility management in cultured landscapes as well as natural areas in the city are very important issues.

2.5 Community Perceptions of Tourism in Christchurch and Akaroa (Report No. 34)

2.5.1 Objective

The objective of the research presented in this report was to develop an understanding of local residents' perceptions, expectations and adaptations to tourism in Christchurch and Akaroa.

2.5.2 Methods

Three principal research methods were employed to collect data over a three-month period from October 2002 to December 2002, and included: archival research of relevant data relating to Christchurch and Akaroa; a telephone-administered resident questionnaire; and a series of in-depth interviews with Christchurch and Akaroa residents. The most significant technique used, in terms of contribution to the results of this study, was the telephone-administered resident questionnaire. This survey was conducted over a three-week period during October and early November 2002. Overall, a total of 2,090 telephone calls were made to Christchurch and Akaroa telephone numbers, of which 1,218 were answered. Of these answered calls, 482 yielded a completed questionnaire (Christchurch = 387; Akaroa = 95), providing a response rate of 32 per cent and 60 per cent respectively for Christchurch and Akaroa.

2.5.3 Key Findings

Overall, the findings of the study indicate that Christchurch residents have a longer historical association with the local community than is the case for Akaroa residents, both in terms of length of residence and origin of birth. However, Akaroa residents appear to have a stronger economic link to the tourism industry. Specifically, Akaroa residents are more likely to be employed in tourism, and to have members of their household or family employed in tourism, than their Christchurch counterparts. The majority of respondents from both communities, however, reported hosting out-of-town visitors in their homes in the last 12 months. This suggests that Christchurch and Akaroa residents are likely to have experienced significant social contact with visitors during the last year, and as such signifies the possibility of residents holding an already-favourable disposition towards visitors.



Residents from Christchurch and Akaroa appear to be positive about tourism, with a majority of respondents indicating a desire for increased levels of tourism in their respective communities. This represents tacit approval of tourism as an acceptable part of the 'landscape' in both locations. Respondents were also able to readily identify a number of benefits from tourism, including increased economic activity, cultural interaction, employment opportunities and improved facilities for locals. In addition, respondents were able to identify a number of tourism-related problems and concerns, including increased congestion, strain on infrastructure, road safety issues and cultural clash. A large proportion

of respondents from both communities, however, were unable to identify specific problems or concerns. Akaroa residents were statistically more likely to identify specific tourism-related problems or concerns than Christchurch residents. Additional statistical analyses showed that responses to the question of problems or concerns were influenced by several factors, including length of residence, birthplace and employment in tourism.

There appears to be a degree of congruence between responses from Christchurch and Akaroa residents with respect to the relatively high level of contact that these locals have with visitors. This holds true for overall contact as well as for 'leisure-time' contact between hosts and guests. Akaroa residents are, however, more likely than Christchurch residents to report that contact during leisure activities enhances their recreation experience. Additionally, the majority of respondents from both communities were unable to identify types of visitors that they particularly liked or disliked, as well as specific places where they either enjoyed or disliked seeing and meeting visitors.

2.5.4 Recommendations

Both Christchurch and Akaroa are currently experiencing a period of sustained growth in tourism activity, which is forecasted to continue well into the future. Although such growth is seen widely as an excellent opportunity for economic benefits to be accrued, tourism planners should be cautious of a fast rate of tourism development. While tourism development often involves local, smaller-scale entrepreneurs, as the industry grows there is a likelihood of externally owned and controlled operations setting up in the area to cater for the growing number of tourists. This kind of development may lead to a lower level of acceptance of tourism. While such development can attract much needed capital investment, if they are to occur then the use of local finance and labour resources should also be encouraged in order to maintain the positive assessment of tourism. Local tourism planners will therefore need to provide clear leadership and direction to achieve this goal. There are clearly additional facilitation roles for the public sector if tourism is to provide benefits for the communities of Christchurch and Akaroa as a whole. A balanced approach between implementing appropriate tourism planning policies and establishing clearer communication between community members is vital if sustainable tourism development is to be achieved in Christchurch and Akaroa.

The overall conclusion of this study is that tourism in Christchurch and Akaroa appears to be at a socially sustainable level at present. While future growth seems assured in the short-term, there are a number of challenges in maintaining the long-term acceptability of the sector for local residents. Accordingly, the findings in this study suggest the following recommendations:

- Although the current level of residents' satisfaction with tourism is high, Christchurch City Council and Banks Peninsula District Council need to ensure that there is good communication with community groups (e.g., business and residents' associations). Improved communication will help to ensure that the needs and wishes of the local community are not overlooked, and will assist all stakeholders in developing a shared tourism vision for Christchurch and Akaroa.
- Tourism management strategies should be integrated into the planning cycles of local government. This will help to ensure that additional visitor-created demands on amenities and infrastructure can be met at peak times. In order to achieve this, local government tourism planning should be strategic and co-ordinated with management efforts of other sectors and with community stakeholders. In addition, tourism planning

should ensure tourism development respects the scale and character of the host location, while also providing for a quality visitor experience.

- Local government should continue to encourage local tourism-related initiatives and developments so as to ensure that benefits from tourism are retained within the community.
- Local authorities should monitor the social impacts of tourism development to ensure that the specific tourism-related problems and concerns are addressed. For example, road safety, pressure on car parking, litter, busier shopping areas and crowded recreation areas can quickly reduce local residents' acceptance of tourism. This is particularly important for destinations that experience a high density of tourists relative to residents.

Overall, residents from Christchurch and Akaroa appear to be positive about tourism, with a majority of respondents indicating a desire for increased levels of tourism development. However, residents from Akaroa are more likely than their Christchurch counterparts to be economically dependent upon tourism, and also to have had their lifestyle affected adversely by tourism development and tourist activity. Given the potential for tourism to impact increasingly upon resident lifestyles, local tourism planners will need to provide clear leadership and direction to safeguard against community dissatisfaction. In addition, tourism management strategies should be integrated into the planning cycles of local government to ensure that the requirements of the tourism sector are adequately addressed.

2.6 Maori Tourism: Concepts, Characteristics and Definitions (Report No. 36)

2.6.1 Objective

The aim of this report was to seek conceptual clarification of 'Maori tourism', including 'Maori tourism business' and 'Maori tourism product'. Specific objectives were focussed on reviewing the different definitions of Maori tourism, providing a broad conceptual framework for defining Maori tourism (business and product), and identifying and describing common values that characterise in more detail a value-based, or, Maori-centred tourism business.

2.6.2 Methods

A Kaupapa Maori research approach was employed. It is critical that Maori research is framed within a culturally relevant perspective. The main sources of data were: Maori tourism publications including those from the Tourism Recreation Research and Education Centre (TRREC) and James Henare Maori Research Centre (JHMRC) Maori tourism case studies; indigenous tourism literature; Maori development literature; interviews with Maori regional tourism organisations, organisations involved in Maori tourism and academics involved in Maori tourism research.

A review of existing published definitions indicated the potential for a broad, integrating framework that represented a synthesis of different perspectives. Within the published literature, there is a predominant focus on defining Maori tourism in terms of the dimensions of control and the nature of the product itself. According to this framework a Maori business included Maori ownership and operation, and/or Maori employees. A non-Maori tourism business had no Maori ownership or control. Both businesses could provide a Maori tourism product. The Maori tourism product was defined as implicit/ passive or explicit such as kapahaka performance. A Maori business could provide a non-Maori tourism product.

2.6.3 Key Findings

While useful as a tool for measuring Maori involvement in tourism, this framework failed to capture the more qualitative, cultural value-based criteria of Maori tourism such as maintaining cultural integrity, environmental sustainability, and community based development. These broader definitions described a specific form of Maori tourism that incorporated cultural values in Maori tourism development, coined 'Maori-centred tourism'. It represented a different perspective from general Maori involvement in tourism. A distinction was made between these two forms of Maori tourism. This difference was also reflected in the various models of commercial development adopted by Maori. Some of the Maori businesses were distinctive as they demonstrate business success while sustaining Maori values. Others operated as a strictly western business model.

There is considerable support for conceptualising and expressing Maori tourism as a distinct activity. This was particularly evident from the interviews with Maori Regional Tourism Groups. Maori-centred tourism entails protecting and developing Maori cultural and intellectual property and the need for self-determined development. Maori-centred tourism is argued to be a culturally relevant approach as opposed to that depicted in existing definitions. Therefore, the report asked: what are the fundamental values that characterise Maori-centred tourism?

Maori-centred tourism values were identified from a review of literature on Kaupapa Maori development models and in-depth interviews with Maori regional tourism organisations. The

values were: nga matatini Maori, kotahitanga, rangatiratanga, whanaungatanga, kaitiakitanga, manaakitanga, wairuatanga, tuhono, puawaitanga and pūrotu. They were expressed as both outcomes and processes/principles. Framing these values within a Kaupapa Maori approach provided a Maori perspective of Maori tourism. Thus, while the information was not new, framing it in a culturally relevant perspective was. Information from the interviews complemented this approach. Essentially, it represents a 'moving forward'. It provided new insight into Maori tourism, one that may inform a Maori-centred tourism.

The list of values was not seen as exhaustive nor were they set in concrete rather they represented a starting point to document some commonalities of a collective value-based Maori tourism, Maori-centred tourism. This was subject to review and evaluation by Maori. The values described could potentially provide a set of indicators or guidelines for a Maori-centred tourism. Effectively, this created a basis for a Maori-centred tourism business ethic.

2.6.4 Recommendations

Defining Maori tourism and the identification and description of the values of a Maori-centred tourism have policy implications for Maori tourism. In addition, defining Maori tourism provides a framework for those involved in Maori tourism that requires a measurement of Maori economic development in the tourism industry. For example, to achieve greater Maori participation in the tourism industry, there is a need to increase the number of Maori tourism businesses regardless of whether they provide a Maori tourism product. Maori ownership and employment may thus be targeted. However, to fulfil obligations under Article 2 of the Treaty of Waitangi with the protection and development of cultural values and the support and promotion of Maori self-determined development then Maori-centred tourism is highly relevant and useful. Below are some potential reasons:

- Maori-centred tourism promotes Maori having control over their economic, social, cultural and environmental resources. It is "about the development of Maori people as Maori". Therefore, the collective values of a Maori-centred tourism represent an expression of a right as Treaty partners and as indigenous peoples to control their future.
- Maori-centred tourism seeks to reflect a Kaupapa Maori self-determined development model that is a unique Maori approach to cultural, social, environmental and economic sustainability. It aims to successfully protect and develop social/cultural capital in development. As such it aims to contribute to more holistic, sustainable development.
- Maori-centred tourism aims to support and empower Maori regional tourism organisations to pursue their own development. Maori self-determined development can only be accomplished by Maori through Maori structures.
- Maori-centred tourism seeks to describe how Maori are involved in the tourism industry rather than just measuring their participation in the industry. The defining characteristics could potentially provide indicators and/or guidelines for Maori tourism development that reflect a culturally acceptable approach to tourism. These could be developed to establish a Maori Tourism trademark along the lines of the Maori Made Mark
- The defining characteristics of Maori-centred tourism are founded on indicators for a "Maori self-determination measure or a Tino Rangatiratanga Index". This provides the Crown with potential indicators to guide an approach to Maori development that meets their obligations under Article 2 of the Treaty of Waitangi.
- To support and promote Maori-centred tourism, it is recommended that capacity building that focuses on strengthening governance, human capital and infrastructure, so Maori can control their own development, is required.

Different perspectives on Maori tourism were synthesised to show that existing published definitions, which focus on dimensions of control and the nature of the product, were limited by not including the maintenance of cultural identity, environment sustainability and community-based development. Seeking those goals means that cultural values are incorporated into Maori tourism development via 'Maori-centred tourism'. Important values are listed and discussed, remain open to development and can provide a set of indicators or guidelines for Maori-centred tourism.

2.7 The Values Associated with Maori-Centred Tourism in Canterbury (Report No. 35)

2.7.1 Objective

The objectives of the research were to validate the relevance of the values of Maori-centred tourism to Maori tourism business practices in Canterbury, and to identify the strategies for achieving Maori-centred tourism business ethic in Canterbury.

2.7.2 Methods

A Kaupapa Maori research approach was used to achieve the research objectives of this study. This approach was seen as appropriate given the need for a culturally relevant perspective. This included employing Maori values derived from a Maori epistemology as measured to analyse Maori tourism development. In-depth interviews were conducted with Maori tourism businesses in Canterbury. The Kaupapa Maori approach also involved ‘a research whanau of interest’ to collect and analyse data.

2.7.3 Key Findings

The sizes of Maori tourism businesses in Canterbury were found to correspond to the nature of ownership of that business. For example, small businesses were individual or whanau-based, medium sized businesses were runanga or marae-based, while large sized businesses were hapu or iwi-based. In addition, the re-evaluation process of the list of values of Maori-centred tourism by the businesses strongly affirmed the relevance and appropriateness of the values.

2.7.4 Recommendations

The following recommendations are aimed at Maori tourism businesses and organisations involved in Maori tourism. We recommend that effective policy and practice of Maori tourism development should adopt the following aspects of Maori-centred tourism:

- Maori determining and controlling the development for themselves
- Include attention to cultural elements in the business
- Adopt Maori cultural values and strategies to provide unique and sustainable tourism development for Maori
- Make a distinction between general Maori participation in tourism and value-based Maori tourism development
- Promote the values and processes for sustainable self-determined development to other relevant audiences
- Recognise the ongoing need to seek communication and partnership between Maori tourism and regional tourism interests and activities

In addition to these recommendations, we suggest that government organisations conduct further research into Maori tourism development that incorporates the cultural ethic.

The Kaupapa Maori research approach validated the relevance of the values of Maori-centred tourism to Maori tourism business practices in Canterbury, and identified strategies for achieving a Maori-centred tourism business ethic in Canterbury.

2.8 The Economic Impact of Tourism on Christchurch City and Akaroa Township (Report No. 37)

2.8.1 Objective

The objective of the research presented in this report was to assess the economic impact of tourism in Christchurch and Akaroa.

2.8.2 Methods

Samples of tourists were taken in both Christchurch (n=570) and Akaroa (n=520). These data were then combined with data on bed-nights from the Commercial Accommodation Monitor (CAM) to estimate the visitor populations for day and overnight visitors. In addition, estimates were made for overnight visitors whether their stays were in commercial accommodation or not, and whether their origins were domestic or international. Visitor numbers were then cross-checked against the 2001 International Visitor Survey (IVS) and Domestic Tourism Monitor (DTM) and adjusted if appropriate. Data were then used to develop a GRIT (Generation of Regional Input – Output Tables) based analysis to determine multipliers, value-added and employment effects arising from tourism activity.

The approach in this case study differs from previous case studies where data were primarily drawn from analyses of tourism business' annual returns (as opposed to direct visitor surveys). A comparison of the various methods used across the case studies highlights that reasonable estimates of tourism activity can be gleaned at relatively low cost by using the method applied in this study.

2.8.3 Key Findings

Christchurch

Approximately 11,000 persons (Full Time Equivalent - FTE), on average over the year 2002, were employed directly in tourism in Christchurch. Many more people work in businesses which are primarily dependent on tourism, but their number has to be adjusted down to reflect the part time and seasonal nature of the work, and the fact that many businesses sell only part of their turnover to tourists.

Every job in tourism leads, on average, to a further 0.46 jobs elsewhere in the Christchurch economy, increasing employment by 5,070 FTEs to a total of 16,070 FTEs. This excludes any jobs in social services (such as teaching) that might be lost if tourism (and hence employment) declined, and people emigrated from the city. Total employment in Christchurch averaged over the 2002 year is estimated to be around 130,000 FTEs so that the direct employment in tourism is eight per cent and the indirect employment is four per cent, bringing the total employment to 12 per cent.

Total direct spending by tourists in Christchurch is estimated to be \$1,103 million in the 2002 year⁷. This direct spending figure is based on a survey of visitor spending per visit for day visitors and per night for overnight visitors, with the spending then being rated up according to the total number of visitors as documented by the IVS, the DTM and the Commercial Accommodation Monitor. Flow-on effects of visitor spending at \$832 million increase total visitor-dependent output in Christchurch to an estimated \$1,935 million.

⁷ Generally, output refers to sales. In some contexts retail trade "output" refers only to the gross margin, not the gross value of sales. However, in this report "output" is used synonymously with turnover.

Value-added⁸ in Christchurch arising directly from tourist spending is estimated to have been \$376 million in 2002 (including \$244 million of household income). The flow-on effects of visitor spending increase total visitor-dependent value added to \$744 million (including \$442 million of household income), a multiplier of 1.98. This high level of flow-on impacts reflects the diversified nature of the Christchurch economy, which provides the majority of both manufacturing and business support services for the tourism businesses in the City. The proportional flow-on effect is **two to three** times the flow-on effects of Kaikoura and Westland, and **more than double** that which occurs in Rotorua, with these centres having much less diversified economic bases.

The above estimates are based on IVS data showing 3.97 million international visitor-nights per year in Christchurch. However, there are alternative data which suggests there are 3.22 million international visitor nights per year (a 19% reduction), the reduction largely confined to non-commercial accommodation by lower-spending visitors. If these lower figures are correct, then the total economic impacts of domestic and international tourism in Christchurch will be some seven per cent less than has been estimated in this report.

Akaroa

Approximately 160 persons (Full Time Equivalent - FTE), on average over the year 2002, were employed directly in tourism in Akaroa. Compared with Christchurch, significantly more people in Akaroa work in businesses which are primarily dependent on tourism. Some of the employment is part time, the industry is seasonal, and many businesses sell only part of their turnover to tourists.

Every job in Akaroa tourism leads, on average, to a further 0.15 jobs elsewhere in the Banks Peninsula District economy, but probably only half of those are created in Akaroa. Hence total tourism-dependent employment in Akaroa is around 172 FTEs. This total excludes any jobs in social services (such as teaching) that might be lost if tourism (and hence employment) declined, and people emigrated from the District. Total employment in Akaroa as measured in the 2001 census was around 261 FTEs, and on average over 2002 it was probably closer to 300. Hence about half of all jobs in the Township depend either directly or indirectly on tourism.

Total direct spending by tourists in Akaroa is estimated to have been \$17.3 million in the 2002 year. This direct spending figure is based on a survey of visitor spending per visit for day visitors and per night for overnight visitors. Visitor spending is then 'rated up' according to the total number of visitor nights in commercial accommodation, as documented by the Commercial Accommodation Monitor, and the number of day visits and visitor-nights in non-commercial accommodation being estimated on the basis of ratios between these various groups as revealed in the visitor survey. Flow-on effects of visitor spending increase total visitor-dependent output in Akaroa to an estimated \$19.2 million in 2002.

Value-added⁹ arising directly from tourist spending is estimated to be \$6.0 million (including \$3.9 million of household income). The flow-on effects of visitor spending increase total visitor-dependent value-added in Akaroa Township to \$6.9 million (including \$4.3 million of household income). The value added multiplier in Akaroa at 1.15 is even less than those for Kaikoura (1.38) and Westland (1.19). This low multiplier reflects the undiversified nature of

8 This is the total of returns to land, labour and capital. Hence it includes wages and salaries, income of the self-employed, rents on land profits, and depreciation of capital.

9 This is the total of returns to land, labour and capital. Hence it includes wages and salaries, income of the self-employed, rents on land, profits, and depreciation of capital.

the Akaroa economy, which only provides limited servicing support for the tourism businesses in the town, and the relatively short distance from the major centre of Christchurch.

2.8.4 General Observations

The impacts reported above arise from the on-going operation of existing tourist facilities. In addition to these are impacts arising from capital injections into the industry (that is, injections additional to ongoing repairs and maintenance - which tend to include minor capital works). Capital expansion in any given year depends on the level of capacity utilisation and the size of the industry base. There is no data series on capital expenditure in tourism, but it is not believed to have been particularly significant in Christchurch in recent years, primarily because of the long-developed nature of the industry and the spare capacity in accommodation. However, ongoing growth in visitor arrivals and expenditure may lead to more significant capital expenditure in the near future.



Christchurch, in spite of the very high level of visitor numbers and visitor-nights, is the least dependent tourism centre we have studied so far. This reflects the highly diverse nature of its economy and the fact that it has a major manufacturing base and also supports other primary industries such as farming. Thus the very features which lead to Christchurch having a high tourism multiplier are also the features which lead to tourism being a fairly modest part of the city economy.

Akaroa, by contrast, has the lowest tourism multipliers but is the most tourism-dependent centre of those we have so far studied. Major growth or a significant decline in tourism would both have very significant effects. Major growth implies the need for increases in infrastructure to cater both directly for the visitors and also for those who work in the industry and reside in the area. It also implies the need to manage the resources available to visitors so that the qualities which entice visitors to Akaroa are not compromised or lost. A major decline in tourism could well lead to high levels of localised unemployment and, conceivably, a major loss in value for those operators who run tourism businesses.

2.8.5 Implications

There have been suggestions that further tourism growth will require a substantial level of local government expenditure (pressures on water, sewerage, and rubbish dumps are commented on by other researchers in this programme). This is especially so for small tourism centres such as Akaroa but is increasingly apparent for larger centres such as Christchurch where visitor numbers are expected to constitute nine percent of the population in December 2008.

Tourism is responsible for 12 per cent of all employment in Christchurch. The fact that this is less than for Kaikoura and Westland Districts (30%) and Akaroa (50%) serves to highlight

the central gateway and economic hub roles that Christchurch plays not only in regional tourism, but also for the South Island as a whole. While peripheral communities are becoming increasingly dependent on tourism activity, they are concomitantly becoming increasingly at risk from tourism volatility. While tourism multipliers appear to have been declining steadily in smaller communities over the last decade or more, the high employment impacts of tourism suggest that growth of tourism continues to be an important force in regional development.

Tourism is a sizable part of the Christchurch economy, where it contributes 12 per cent of all jobs. Tourism spending is estimated at \$1,103 million annually in the city and, when flow-on effects are considered, generates approximately an additional \$832 million, or a total of \$1,935 million in benefits to the city's economy. Tourism is a significant part of the Akaroa economy where annual spending of \$17.3 million generates approximately 50 per cent of all jobs. Christchurch's high level of flow-on impacts reflects the diversified nature of its economy, which provides the majority of both manufacturing and business support services for the tourism businesses in the city. The proportional flow-on effect is five times the flow-on effect of Akaroa, two to three times the flow-on effects of Kaikoura and Westland, and more than double that which occurs in Rotorua, with these centres having much less diversified economic bases. This low multiplier in Akaroa Township reflects the undiversified nature of the local economy, which only provides limited servicing support for the tourism businesses in the town, and the relatively short distance from the major centre of Christchurch.

2.9 Tourism, Waste and Water in Akaroa (Report No. 38)

2.9.1 Objectives

There are three components to this research project. The first is the quantitative analysis of the impact of tourist flows to Akaroa on the town's water supply services and wastewater management services. The second is the quantitative analysis of the impact of tourist flows to Akaroa on the town's solid waste management services. The third component is the investigation of the way in which water supply, wastewater and solid waste systems are funded. This latter analysis investigates whether there are alternative funding systems that are more efficient, that would moderate demands, and are more equitable than present funding systems. It also considers how best to allocate any additional costs of water supply if there is growth in tourist numbers.

2.9.2 Methods

From October 2002 to January 2003, three intensive surveys were conducted within Akaroa Township. Each survey extended over four days and assessed a number of dimensions. We worked with individual accommodation businesses to record guest nights, water consumption and waste production for each day during that study period. A survey of a sample of non-residential properties quantified how many non-permanent people were in town and measured their water use. A survey of pedestrians identified the ratio of day visitors to overnight visitors. Other data included road traffic counts, supermarket foot traffic, etc. We correlated this 'tourism' flow data with data on water consumption, wastewater production and solid waste production.

2.9.3 Key Findings

A model of water use and wastewater production was completed to determine the shares of water use and wastewater production attributable to residents, the commercial sector and visitors. Irrigation was identified as a major use of water during peak periods. The model was designed to estimate peak daily flows (important for infrastructure design to handle peak flows safely), as well as monthly mean flows. Lawn and garden watering are likely to be



a significant cause of high water demand during the peak tourist season (summer months). Internal water use correlates closely with dry weather wastewater flows. Tourists' demand on Akaroa's water supply could be as high as 60 per cent of the total daily peak water use. However when analysing average monthly demands, tourist's use ranges between five to 40 per cent of the total monthly water use. Infiltration of the sewer network by runoff following rainfall is identified as a major source of peak wastewater flows. In addition, volumes of waste in street bins are strongly correlated with numbers of visitors to Akaroa.

2.9.4 Recommendations

The systems used by Banks Peninsula District Council (BPDC) to fund Akaroa's water, wastewater and solid waste systems are critiqued against ten criteria and are found to perform poorly. The mix of rates and charges fail to meet efficiency or equity objectives. Residents and holiday homeowners pay disproportionately large shares of the costs of these systems. Water meters have been installed in Akaroa and volumetric water and wastewater charges can be introduced, following further data collection, to reduce peak water use and more accurately allocate costs. This will also lower BPDC operating costs and avoids the need for new water supply capacity.

Specifically, we recommend that:

- The Banks Peninsula District Council introduce improved water, wastewater and solid waste charging systems.
- Significant improvements in the design and maintenance of water and wastewater systems

Modelling of demand for water and wastewater use showed that tourists' demand on Akaroa's water supply could be as high as 60 per cent of the total daily peak water use and between five to 40 per cent of the total monthly water use. The impact of tourists on wastewater flows appears to be low, with infiltration of the sewer network by runoff following rainfall identified as a major source of peak wastewater flows. There is, however, a strong correlation between volume of solid waste in street bins and visitor numbers to Akaroa. When addressing the funding of infrastructure systems in Akaroa, the issue of equity in pricing is crucial. This is because residents and holiday homeowners in Akaroa presently contribute a disproportionately large amount towards the cost of town's water, wastewater and solid waste systems. This situation should, however, be successfully alleviated once volumetric water and wastewater charges are introduced.

Chapter 3

Key Elements of a Christchurch Tourism Policy

3.1 Introduction

The summaries of research and recommendations presented in the last chapter are integrated below. These are then linked to a separate study of local government response to tourism that characterises tourism planning in Christchurch. Drawing from these results allows us to make recommendations for tourism management.

3.2 Summary of Main Findings

Canterbury is a destination which currently has more than 735,100 international visitors per year (3.3 million bed nights) and 2.3 million domestic visitors per year (7 million visitor nights). Taken together the above visitor categories amount to over 10 million visitor nights per year in Canterbury. Approximately 97 per cent of all international visitor nights in the Canterbury region are spent in Christchurch. A significant number of visitors make daytrips to 'other' destinations within the Canterbury region. This suggests the presence of regional disparities as the costs and benefits associated with tourism development and operation in the Canterbury region are borne and accrued disproportionately. For international visitors an increase in visitation and volume (bed nights) slightly in excess of 50 per cent is anticipated by 2008. Domestic visitation is forecast to grow more slowly at 3.4 per cent per year during the same period to generate a 26 per cent increase in visitors. In total, international visitors in 2008 will increase, on a daily basis, the 'Usually Resident Population' of Christchurch by between 4.5 per cent (May) and 9.4 per cent (December) (compared to 2.6% in 2001).

Our survey of visitors to Christchurch showed that the majority of respondents in our sample were international visitors, were young and had not previously visited Christchurch. A slight majority of visitors reported less than adequate prior knowledge of Christchurch, but 70 per cent did not believe they wanted more information prior to the trip. Interest in information varied among the different international groups of visitors. For a scenario of a one-month stay in New Zealand, most visitors recommended a three to four day stay in Christchurch. Nearly two thirds of visitors reported no disappointments with Christchurch. Ninety per cent of visitors made their decision to travel to the city before leaving their country of origin. The planning of Christchurch stay itineraries was undertaken at home by only 50 per cent of these visitors, with a further 47 per cent planning their Christchurch itineraries while in New Zealand. The most often cited influence on international visitors decisions to travel to Christchurch were 'advice from family and friends' (42%). A further 36 per cent of visitors surveyed 'had not visited Christchurch before'. In addition, the 'convenience' of Christchurch as a tourist stopover was cited by 29 per cent of respondents, reflecting the gateway function of the city for many tourists.

Visitors and locals have identified three factors or ways of defining environmental management in Christchurch. These factors are characterised as 'city beautiful', 'untouched nature' and 'clean and green'. Based on these findings, and given a consensus on core environmental preferences, attention to design and facility management in cultured landscapes as well as natural areas in the city are very important issues.

Overall, residents from Christchurch and Akaroa appear to be positive about tourism, with a majority of respondents indicating a desire for increased levels of tourism development. However, residents from Akaroa are more likely than their Christchurch counterparts to be economically dependent upon tourism, and also to have had their lifestyle affected adversely by tourism development and tourist activity. Given the potential for tourism to impact increasingly upon resident lifestyles, local tourism planners will need to provide clear leadership and direction to safeguard against community dissatisfaction. In addition, tourism management strategies should be integrated into the planning cycles of local government to ensure that the requirements of the tourism sector are adequately addressed.

Different perspectives on Maori tourism were synthesised to show that existing published definitions, which focus on dimensions of control and the nature of the product, were limited by not including the maintenance of cultural identity, environment sustainability and community-based development. Seeking those goals means that cultural values are incorporated into Maori tourism development via 'Maori-centred tourism'. Important values are listed and discussed, remain open to development and can provide a set of indicators or guidelines for Maori-centred tourism. In extending this conceptual work, a Kaupapa Maori research approach validated the relevance of the values of Maori-centred tourism to Maori tourism business practices in Canterbury, and identified strategies for achieving a Maori-centred tourism business ethic in Canterbury.

Tourism is a sizable part of the Christchurch economy, where it contributes 12 per cent of all jobs. Tourism spending is estimated at \$1,103 million annually in the city and, when flow-on effects are considered, generates approximately an additional \$832 million, or a total of \$1,935 million in benefits to the city's economy. Tourism is a significant part of the Akaroa economy where annual spending of \$17.3 million generates approximately 50 per cent of all jobs.

Modelling of demand for water and wastewater use showed that tourists' demand on Akaroa's water supply could be as high as 60 per cent of the total daily peak water use and between five to 40 per cent of the total monthly water use. The impact of tourists on wastewater flows appears to be low, with infiltration of the sewer network by runoff following rainfall identified as a major source of peak wastewater flows. Residents and holiday homeowners in Akaroa presently contribute a disproportionately large amount towards the cost of town's water, wastewater and solid waste systems. This situation should, however, be successfully alleviated once volumetric water and wastewater charges are introduced.

Across all reports is the observation that the challenges for tourism are going to rely for their resolution on some kind of consensus or agreement. This is because the problems to be addressed are inherently linked, broad in their implications and, in many cases, are beyond the resources of any individual entity to address. There will be an ongoing need to develop and maintain relationships with affected parties.

The results from our reports need to be considered alongside the results of previous research, including two separate studies of local government response to tourism in New Zealand generally (Jones, Shone and Memon, 2003) and Christchurch specifically (Bass, 2002). The study by Jones et al. (2003) was undertaken in the context of the *New Zealand Tourism Strategy 2010* (released 2001) and in anticipation of the requirements to implement the provisions for community consultation and preparation of Long-Term Council Community

Plans, as set out in the *Local Government Act 2002*. The key objective of this preliminary study was to document the existing and emerging tourism policies and practices within the local and regional government sectors in New Zealand. To achieve sustainable tourism development, local government has the opportunity to formulate strategies that provide direction and guidance to the industry, set development standards appropriate to the social and biophysical carrying capacities of the host area and make provision for the development and maintenance of adequate infrastructure. However, the findings of Jones et al. (2003) indicate a paucity of clearly articulated, co-ordinated and integrated strategies for sustainable tourism development (i.e., that recognises tourism enablement *and* management issues) at the local and regional levels in New Zealand. In fact, few local authorities and even fewer regional authorities appear to have formulated tourism-specific plans or policies that clearly define what sustainable tourism development means for their locality or region. In addition, the findings indicate that there exists no apparent consensus regarding the extent, focus and methods that should be applied to planning and managing tourism at the local and regional levels.

Bass (2002) interviewed key personnel in the Canterbury Regional Council (ECAN), the Canterbury Development Corporation (CDC), Christchurch and Canterbury Marketing Ltd. (CCM) and the Christchurch City Council (CCC) with a view to understanding their tourism-related policies and planning processes. He found that the regional council identifies itself as holding no importance for tourism planning and management, and that the CDC considers its tourism-related activity as being limited to regional economic development. Christchurch and Canterbury Marketing Ltd. and the CCC have more responsibility for tourism. Additionally, CCM's organisational, cognitive and resource capacity is quite comprehensive, with a focus on the economic component of tourism.

According to Bass (2002), the CCC has both strategic and project-orientated teams that plan and manage all areas where tourism could be enabled or can have an impact. However, most of the units and teams have only limited awareness of tourism. Within the Council, tourism is equated with economic benefit and it is perceived that general planning and management for local residents benefits tourists at the same time. The city itself is seen as a gateway rather than a destination. The economic benefit is seen as being one of the city's several 'economic pillars', but not necessarily the most important economic pillar. Any possible impacts, both costs and benefits, are believed to be no more than minor. There is also the belief that the triple bottom-line is incorporated in the teams' and units' work, but the interviews showed that the primary focus was on economic benefits only. In addition, Bass (2002) reports that the Visitor Co-ordination Group is evidence of some response to tourism issues and this group achieves some integration between groups but, on balance, co-operation and communication between the teams and units of the CCC and other external organisations is predominantly on a project-to-project (i.e., *ad hoc*) basis.

In essence, the situation for Christchurch is as follows. Tourism is an important and growing part of the economy. Currently, the satisfaction levels of both locals and visitors are high. Visitors and locals like the beautiful, untouched and clean and green aspects of the city. The economic contribution of tourism is significant (12% of all jobs). Smaller peripheral tourist centres like Akaroa have heightened challenges from tourism. This is especially evident where there are high visitor flows over a comparatively small residential population. Tourism planning is not well developed by local governments generally, nor by Christchurch specifically. The challenge for tourism planning is to establish planning systems so that

tourism development can take a more strategic role and proceed in tandem with enhanced social, economic and environmental performance.

3.3 Local Government and Sustainable Tourism Development

Regional and local governments have a variety of roles in facilitating sustainable tourism development. These roles are based on legislative requirements primarily established by the *Resource Management Act 1991* (RMA). The implications of the RMA for tourism are significant and wide-ranging, even though the term *tourism* is not mentioned specifically in the Act. Generally, it is well accepted and reinforced in our research that New Zealand's tourism industry depends upon the maintenance of environmental quality as a major draw card for international visitors. The RMA is therefore directly relevant to both the development and management of tourism because it not only has an explicit commitment to the 'sustainable management of natural and physical resources', but is also concerned with the way impacts are managed.

Aside from the RMA, regional and local councils also have responsibilities for tourism through a range of other legislation. In New Zealand, territorial local authorities (TLAs) derive their legislative power from the *Local Government Act 1974*. Until recently, the *Local Government Act 1992* significantly limited the role that regional councils could play in tourism. However, more recently the *Local Government Act 2002* has gone some way to alleviating the marginalised role that regional government plays in tourism planning and management. The key amendments within the 2002 Act are as follows:

- The granting to local authority¹⁰ the 'power of general competence' (as set out in Part 2 of the Act), allowing the freedom to undertake any action or make any decision which is not specifically excluded by law or by central authority.
- The granting of regional, district and city councils the same powers of general competence allowing for a greater range of intervention at the regional and local levels. Potentially this provides more opportunity for regional councils to actively pursue sustainable development objectives. This increased local discretion and flexibility will be balanced with a legislative requirement for a required protocol, or process of communication and consultation to guide how councils work together during the course of a three-year term.
- The Act clearly signals the need to prepare strategic plans (Long-Term Council Community Plans) to identify outcomes and priorities wanted by communities, beyond the required Annual and District Plans, including those related to tourism.

Local authorities have dual functions that can be broadly categorised as the enablement of tourism and management of tourism's negative impacts. These dual functions can create a conflict of interest for local authorities over what level and type of development to allow. While local authorities use tourism to realise economic opportunities to areas under their jurisdiction, for tourism development to be sustainable councils must also seek to mitigate adverse effects from tourism growth.

The enablement of tourism by local government can be defined as more than just the promotion and marketing of a region. By enabling tourism, territorial authorities aim to

10 The *Local Government Act 2002* defines a 'local authority' as a regional or territorial authority.

advance economic development opportunities. Enabling visitor growth and tourism development have not been traditional functions of local government, who have often seen their role as limited to providing the required utilities and amenities, and administering necessary planning and development processes. Recently, however, local government is more actively supporting tourism as part of initiatives to spark regional economic and development opportunities, due largely to the sector's growth potential. Tourism is also seen as an area of investment that allows councils to fulfil their dual responsibilities of economic development and the provision of facilities and services for local communities, as well as for visitors and the industry itself.

However, while tourism undoubtedly contributes to regional economic development, many authors are quick to point out that unless managed properly, the costs of tourism can exceed its benefits. As public sector bodies, territorial authorities have certain functions and responsibilities requiring them to avoid, remedy or mitigate the negative social, biophysical and economic impacts that increased visitor numbers and tourism activities can cause. With this in mind, public sector management should be aware of the adverse effects the tourism sector can cause and be prepared to alleviate them, while not adding to these problems by over-regulation that is likely to stifle tourism's inherent dynamism.

3.4 Common Values and Aspirations

When taken together, the results of our research show that the goals and aspirations of both locals and visitors have some key shared attributes.

Importance of environment

Tourism is a difficult phenomenon to see and describe, however its effects on the natural and built environment provide a useful mechanism to draw out discussion and concerns about its more intangible effects. The results of our research show that visitors' experiences of Christchurch are notable for the strong focus on natural landscapes. There is a common desire to retain much of the present atmosphere among both residents and tourists and this indicates the need for strong advocacy in design and proactive management of tourist infrastructure.

Avoiding Negative Environmental Impacts

Elements of the Christchurch environment are the key attractions (products) that Christchurch offers as a tourist destination. While these are features for visitors, their management (planning, resourcing and maintenance) is also a key concern for locals, and Maori in particular. Active management of these key public resources secures the environment on which tourism grows.

Employment

Tourism has been a modest generator of employment in Christchurch and a significant one for Akaroa. For the latter, tourism has grown to fill the gap left by government-led restructuring of the public sector in the mid 1980s and other structural adjustments in primary production.

To date the growth of tourism in Christchurch and Akaroa is perceived largely as positive by the local population and business community. Tourism, however, is a resource-based industry that can (and often does to varying degrees) experience boom - bust scenarios. Both

a disenchanted public and the loss of investment from outside investors can erode initial high levels of support and local economic gains. Research in New Zealand (NZTB, 1988) confirms the increasingly recognised belief that a low or even moderate level of tourism can be a great boost to a community, but that those communities most exposed to risk are those with high seasonality of visitation, and high levels of economic dependence on the sector. Difficulties also arise if tourism no longer delivers benefits to locals - be it in direct forms such as jobs or household income, or in indirect forms such as modifying a community's sense of place through crowding, environmental degradation, or changes in the built environment. Thus, while tourism generally appears to be well accepted in Christchurch and Akaroa it is appropriate to consider emerging evidence of issues and tensions between tourism and locals' aspirations and needs.

3.5 Issues and Tensions

The topic of issues and tensions can be addressed by focussing on the risks to tourism, that is, the things that threaten tourism if the issues and tensions are not addressed. There are three areas of concern.

Risk Management

When tourism is introduced gradually to a location, the impacts are more easily absorbed as the community develops adaptive strategies. Official forecasts for New Zealand tourism indicate a 57 per cent increase in international tourist numbers between 2000 and 2006 (Forsythe Research, 2000). Significantly for Christchurch, the city has been achieving consistent growth in visitation at eight per cent per year in the last three years. For the Canterbury region, visitation by international tourists is forecasted to increase by 50 per cent, and for domestic visitors by 26 per cent, by 2008. In 2001, international visitors increased the population of Christchurch, on average, by 2.7 per cent. By 2008, this is forecasted to have increased to between 4.5 per cent (off-peak) and 9.4 per cent (peak). The growth in domestic tourism will not be so marked, but driven off a higher initial base, will rise from 5.8 per cent to 6.4 per cent of the daily resident population quotient. Together these data indicate additional average visitor pressure of 13.1 per cent above the 'resident base' throughout 2008, with a range of approximately 9 per cent (May) to 18 per cent (December). In the longer term, the New Zealand Tourism Strategy has indicated the potential of a further 80 per cent increase in international visitors to New Zealand in the next decade (from 1.8 million to 3.25 million visitors nationally per year) (NZTSG, 2001).

Thus, while Christchurch is presently experiencing consistent growth in tourist visitation, the forecasted growth rate suggests that in five years time the proportion of visitors to residents will be significantly higher than at present. Consequently, it is likely that a greater proportion of Christchurch's economy will depend on tourism. While these levels may not necessarily constitute an over-dependence on the sector, the trajectory nonetheless suggests the need for careful consideration regarding the potential impacts (both positive and negative) of this growth in tourism on the city, its residents and environs.

There are two sets of risks in an over-dependence on tourism.

- Because tourism is a 'luxury good', it fluctuates strongly with the availability of personal disposable income and perceptions of economic stability and growth. When tourism is a significant factor in the local economy, these communities are vulnerable to a downturn in tourism and associated economic activity.

- The environmental capacity of Christchurch and Akaroa to absorb tourism is finite. Over-expansion or poorly managed development can degrade the key qualities that visitors seek, or that local communities value. In other words, unmanaged tourism can be a significant risk to long-term community stability and well-being. Consideration, therefore, needs to be given to the overall style and size of tourism in these and other centres in the Canterbury region.

Maori Aspirations

Maori seek a self-determined approach to sustainable tourism development that incorporates unique Maori values for Kaupapa Maori development. Growth of tourism that ignores these needs could lead to counterproductive antagonisms.

Resourcing Costs

Our studies suggest that infrastructure for tourist provision is most problematic where there are high and increasing tourist flows and low levels of population. The case of Akaroa illustrates this situation well and, in addition, involves equity issues to address in the provision of services (e.g., water, waste water and solid waste). A fundamental principle of current economic practice is the notion that those who derive benefits from resources, or inflict costs on others, should pay. For tourism this indicates that the industry might be targeted as the primary source of funds for necessary infrastructure and resource protection works. The problems of small communities (and public agencies, e.g., DoC) in finding funds for essential visitor infrastructure is receiving increasing recognition (NZTSG, 2001), and again Akaroa's experience in this regard needs to be incorporated into this wider debate.

3.6 Christchurch and Canterbury Tourism Planning at a Critical Point

Christchurch City accrues significant benefit from the travel and stay of visitors who are attracted to regional tourism destinations (such as Akaroa, Hanmer and Kaikoura). At the hub, Christchurch appears to be a 'net gainer' in economic terms, while peripheral regional communities report increasing pressures in resourcing costs. These regional sites experience varying degrees of day and overnight visitation but nonetheless bear the pressures and costs of the physical presence of all visitors. Thus, the picture emerges of increasing regional disparities as the costs and benefits associated with tourism development and operation in the Canterbury region are borne and accrued disproportionately. Such disparities, however, can only be resolved at the national level.

It is our assessment that:

- Christchurch currently draws significant advantage from tourism, but by not explicitly planning for the sector as a whole its long-term growth challenges sustainable development, not just for the sector but also for wider community values.
- By not giving appropriate attention to tourism it is possible that negative impacts could become significant, and which would only be addressed by ad hoc reactions.
- Farsighted tourism planning is needed. Tourism planning needs to be enhanced, policies need to be integrative (involving the regional council, regional tourism organisation and other local councils) and comprehensive (not just marketing but management of public resources and integration with other sectoral plans).

- Long-Term Council Community Plans (as signalled in the *Local Government Act 2002*) can be used as an instrument by which to achieve comprehensive tourism planning, and can also be used to facilitate a broad regional approach.

Tourism is growing rapidly, and appears to be doubling every seven to eight years. Canterbury needs to adopt a strategic and integrated approach to tourism planning – one that integrates tourists’ flows and tastes with locals’ aspirations, their resources and the region’s infrastructure needs. There is also an urgent need for better planning that reflects what both locals and visitors want from their experiences of Canterbury. Christchurch is ideally placed to take the lead in developing this regional planning perspective.

Tourism is a difficult sector to describe. Within the private sector it involves a large number of industries (some quite indirectly) and it also has a broad public sector interface involving both local and national agencies. Tourism planning is emerging as an increasingly specialised area that requires both a broad level of consultation and number of specific outputs. The implications of our assessment are addressed in the following section.

3.7 Recommendations

The overall conclusion of this study is that tourism in Christchurch and Canterbury appears to be at an economically and socially sustainable level at present. While future growth seems assured in the short-term, there are a number of challenges in maintaining the long-term sustainability of the sector and its role in social and economic development. The key areas of risk are those associated with the broader institutional, infrastructural, environmental and social elements of tourism management. The main thrust of the results from this research programme is that tourism planning needs to focus at a broad level and integrate across sectors and issues. However, this report also has specific implications for the marketing of tourism, some of which are noted here. Many of our recommendations therefore apply to those organisations with a broader societal and environmental mandate than tourism alone. The following recommendations are grouped into six areas.

Institutional

Neither Christchurch nor Akaroa have yet to develop a robust, well-resourced institutional structure for tourism management at the level of sophistication that we observed in Rotorua. Results from this programme of research show that the issues of natural resource management, and of general public opinion about tourism, are important elements of tourism that must therefore be managed carefully. This is particularly important if the planning goal is to develop a viable long-term vision and strategy to ensure tourism’s sustainability. We recommend therefore, that:

- The Christchurch and Canterbury Marketing Ltd. (regional tourism organisation) programme for reporting key tourism statistics be maintained. The industry, developers and those responsible for planning wider aspects of the sector need reliable data. The continuation of this tourism statistics programme will therefore help to provide planners, managers and marketers with accurate data to assist in enabling and managing tourism (and tourist impacts) within the Canterbury region.

Since tourism is a significant component of the wider Canterbury economy, there is a need to develop a *regional strategic planning processes* involving representation from appropriate

agencies and stakeholder groups (e.g., regional council, city and district councils, regional and district tourism organisations, local residents and local iwi). The output from this process would be a Christchurch and Canterbury Strategic Tourism Plan. In terms of executing the plan, there may be a need for:

- A new cross-sectoral organisation.
- An enhanced role for regional and district tourism organisations.
- An enhanced role for Environment Canterbury (Canterbury Regional Council).

The above points indicate the need for change to the management of tourism, both in Christchurch and Akaroa specifically, and in Canterbury generally. In some ways, the planning issues are intensified by structural factors distinct to Christchurch and Akaroa, which make the resolution of institutional structures as they relate to tourism more demanding. By contrast, it was observed in the Rotorua case study¹¹ that tourism planning was managed by a dedicated organisation *within* the local council itself (Rotorua District Council). Moreover, all of Rotorua's major tourist attractions are located within the district council area. The manner in which the enablement and management of tourism in Rotorua has developed (to date) at the institutional level has been a relatively clear and straightforward process, with areas of responsibility for tourism clearly defined within the existing district council structure. Consequently, such a tourism management structure has gathered strong support from council itself.

In the case of Canterbury, however, any such planning and service provision considerations that relate to tourism typically occur within the domains of the various territorial local authorities within the Canterbury region, and are thus not generally supported strongly in their own right. The task of marketing the various aspects of the Canterbury region to tourists and potential visitors lies with Christchurch and Canterbury Marketing Ltd. (the regional tourism organisation), which has a dedicated tourism role with a sole focus on marketing. Consequently, there is a need for an enhanced tourism planning process to bridge the apparent divide between enabling tourism and managing tourism (and tourist impacts) at the institutional level. One option might be for Christchurch and Canterbury Marketing Ltd. to take a lead role in advocating tourism planning by having a dedicated Tourism Planning Officer. Part of this officer's function would be to liaise and link with city and district council functions and to manage tourist data collection and presentation. The Visitor Co-Ordination Group might also be utilised to advance this co-ordinating function.

The outcome of the eventual organisational structure considered most appropriate would be an integrated tourism planning framework which included co-ordination and partnerships primarily between the regional council (Environment Canterbury), territorial local authorities, regional tourism organisation (Christchurch and Canterbury Marketing Ltd.), relevant government agencies and non-government organisations within the Canterbury region.

Infrastructural

A key issue is the adequacy of environmental management, both now and in the future, and the appropriateness of pricing mechanisms for these services. These are presently considered adequate for Christchurch but not for Akaroa. There is, therefore, an urgent need to improve the funding basis of infrastructure provision in Akaroa, as well as an urgent need to address

¹¹ See Appendix 1 for the full list of reports relating to the Rotorua case study.

the issue of infrastructure provision in other peripheral tourism destinations within the Canterbury region. We recommend that:

- The regional strategic tourism plan (noted above) should either develop or recommend suitable pricing mechanisms for tourist hotspots to effectively and equitably fund needed infrastructure or services.

Environmental

Both domestic and international tourism in Christchurch relies heavily upon the desire of visitors to experience and appreciate ‘natural’ urban settings. These include gardens and open urban spaces with tall trees. These qualities are vulnerable in several respects: development for commercial or residential uses; overcrowding; and site degradation. Long-term policies, plans, and design and management guidelines are needed to conserve the environmental qualities that underpin tourism. Design and management guidelines are an important means by which policies are put into effect: they are the important stimulus for the experience of visitors. We recommend that:

- The issue of design be recognised as a critically important factor in planning for tourist development in Christchurch and throughout Canterbury. A recurring theme in the study of both locals’ and visitors’ preferred experiences has been the sensitivity of respondents to the appearance of Christchurch. The challenge is to meet the requirements of both locals and visitors.

Social

Tourism in Christchurch and Akaroa (and in Canterbury generally) relies heavily upon the sense of security and comfort of visitors and on the friendliness of local residents. We recommend that:

- There is community involvement in tourism planning. While residents are currently satisfied about tourism, they have concerns about tourism influencing the style and character of their ‘home towns’. In addition, there is growing concern that the needs of tourists should not usurp the needs or primacy of local residents.
- There is explanation of the significance of tourism and its broad benefits (and costs) to local residents.
- Since Maori seek involvement in tourism in ways that acknowledge their priorities, aspiration and knowledge, particular attention should be given to find ways to retain their cultural heritage while enhancing economic opportunities.

Market

Several aspects of the research point to distinct international and domestic visitor experiences within Christchurch. Evidence for these are seen in tourist flow patterns, attractions visited and experiences preferred. We recommend that:

- There is regular assessment of the natural landscape and of infrastructure quality as perceived by visitors.
- Information sources need to be portable (e.g., brochures) and retain their independence from promotional activities. Information should be delivered to tourists in their home situations (the key location of travel related decision making).

National-level Risk

In the wider context of tourism development and planning in New Zealand, it has become apparent throughout this research and synthesis that local (and site) level tourism planning

must be established within a national framework. Promotion and advertising decisions made elsewhere have significant downstream effects, and without input from key destination areas and touring regions, too strong a marketing orientation can distort community goals and local environmental realities. We recommend that:

- Relevant organisations continue to communicate local needs to national level tourism organisations and government agencies.

3.8 Conclusion

This chapter has taken the findings from the constituent studies and developed a set of recommendations based on common values and aspirations, and on issues and tensions evident in tourism in Christchurch and Akaroa. Specifically, these issues and tensions include those relating to maintaining a suitable level of long-term growth, as well as addressing the regional imbalance especially evident in smaller peripheral areas that serve as important day-trip foci (e.g., Kaikoura, Hanmer, Akaroa). While some of the recommendations are challenging they also provide an opportunity to plan and manage tourism well. Given the importance of tourism to the economy, such planning is vital, especially given current and projected rates of growth.

Since the inception of the Christchurch and Akaroa case study, the *Local Government Act 2002* has been passed and brings with it new opportunities for tourism planning and management under the Long-Term Council Community planning process. Important among these are opportunities for the inclusion of multi-sectoral foci which could, in the case of tourism, facilitate both the integration of tourism impacts (both positive and negative) into the Community Outcomes process and the development of partnerships between territorial local authorities, regional tourism organisations, regional councils, government agencies and non-government organisations leading to a broader regional focus. If this path were followed, it could provide the opportunity for clarifying a local and regional ‘vision’, facilitating appropriate planning partnerships and alliances, and lead to more efficient and effective resource allocation for enabling and managing long-term tourism growth in Christchurch City and the wider Canterbury region.

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Appendix 1

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Michelle Collings
Research Administrator
Tourism, Recreation Research and Education Centre
PO Box 84
Lincoln University
Canterbury
New Zealand

Phone: 64(3) 325-3838 x 8744
Fax: 64(3) 325-3857
Email: collingm@lincoln.ac.nz