Christchurch and Canterbury Visitor Profile and Forecasts

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Chapter 1
Executive Summary

1.1 International Market

- Consistent growth is forecasted through to 2008 when Christchurch will receive 1,497,000 visitors an increase of 56 per cent (535,000) on 2001.
- Visitor nights are projected to increase from 5,284,000 in 2001 to 8,154,000 in 2008 an increase of 54 per cent (2,870,000).
- The dominance of the Australian market will decline slightly, while the UK/Nordic market increases significantly providing 1,712,000 visitor nights in comparison with Australia's 1,305,000.

1.2 Domestic Market

- Annual growth of 3.4 per cent for trips and 2.3 per cent for visitor nights forecasts an additional 397,000 trips to Canterbury by 2008 and 1,229,000 visitor nights.
- Almost 70 per cent of all trips from the North Island will come from Auckland and Wellington.
- The South Island will provide 74 per cent of all trips to Canterbury.

1.3 Day Trips

- 90 per cent of all trips will be 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).

1.4 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.

1.5 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.

1.6 Visitor Impact

- 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 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). 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 Kaikoura[1] 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 also be felt in providing appropriate parking facilities.
- 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.

1 Tourists are already estimated to generate 38 per cent of service requirements in Kaikoura (TRREC Report No. 54).

Chapter 2
Introduction

2.1 Purpose of the Study

Lincoln University received funding from Central Government (Foundation for Research Science and Technology (FRST) to undertake a Christchurch based tourism case study. This is the fourth in a series of case studies that to date has included Kaikoura (1998), Rotorua (2000) and West Coast (2001). The purpose of these studies is to provide information on the evolution and impacts of tourism, with a view to developing guidelines for the planning and management of tourism in these areas and throughout New Zealand.

This purpose of this particular project within the overall study is to provide:

- Information on the current performance of the visitor industry in Christchurch and Canterbury.
- Information on particular markets including domestic, international, day visitor and some specific markets such as conventions and events.
- Visitor forecasts and projections based on existing performance through to 2008.

From the information prepared it is proposed that this is used to provide:

- The base information for the development of a Christchurch Tourism Strategic Plan.
- Information essential to the assessment of tourism infrastructure needs in Christchurch.
- Information for the assessment of the potential economic benefits from tourism in Canterbury.
- Information to enhance the effectiveness of marketing the city and region.

2.2 Market Research Methodology

The information required for this project is primarily taken from existing national research completed by other agencies contracted by the Ministry of Tourism and specific information collated regionally. This information is then used to assist in developing forecasts and projections for the various markets in Christchurch and Canterbury through to 2008. Domestic results are for the Canterbury Region, while the international results focus on Christchurch City.

The information sources used are detailed in the table below.

Table 1
Information Resources

Normal	Research Information Source
International	▪ International Visitor Arrivals (IVA) – derived from external migration data to provide an accurate count of international visitors to New Zealand. Provides monthly statistics on the number of short term visitors. ▪ International Visitor Survey (IVS) – provides key information on international visitor behaviour in New Zealand. Over 5,000 departing visitors are interviewed each year in over 11 different languages at Auckland, Wellington and Christchurch airports. The IVS excludes visitors under the age of 15 years. This sector accounts for approximately 8% of all international visitors. The IVS data is used to report on the current performance of the international visitor market. (Section 3.1). ▪ Commercial Accommodation Monitor (CAM) – is a census of accommodation providers in New Zealand and has been conducted since 1996. The CAM measures the number of establishments, capacity, nights spent, occupancy rates and origin of visitors (international and domestic) staying in commercial accommodation (businesses registered for GST with an annual turnover of at least $40,000). ▪ Tourism Research Council NZ Forecasting Programme – includes forecasts of international visitor arrivals, nights spent, expenditure, regional activity of international visitors. The visitor forecasts prepared by Market Economics Ltd are based on the IVA data rather than IVS. Using the IVA data and applying it at the regional level indicates that visitor arrivals are higher than previously reported by the IVS for Christchurch and Canterbury. For the forecasts through to 2008 the Market Economics data are used for the base year (2001).
Domestic	▪ Domestic Travel Survey (DTS) – is the key measure of domestic travel activity by New Zealanders. The survey involves interviewing around 17,000 New Zealanders on their domestic travel experiences, including day and overnight travel. ▪ CAM (see international for description).
Day Trip	▪ DTS (see domestic for description).
Convention	▪ Ernst & Young Convention Survey – spasmodic (2001 and pre 1998) collection of regional convention data for the domestic and international markets.
Events	▪ Christchurch City Council festival events.
Other	▪ Key Tourism Statistics (KTS) – a monthly collation of research prepared by Christchurch & Canterbury Marketing based on information collected through their internal sources and some primary data. ▪ Destination Benchmarking – a visitor satisfaction and visitor behaviour survey completed by The Tourism & Leisure Group Limited for Christchurch & Canterbury Marketing in 2001.

2.3 Definitions and Terms

Table 2
Definitions and Terms

Terms	Definition
Day trip	A trip made within one day outside the area in which a person usually lives or works day to day, involving travel of at least 40km.
Domestic visitor	A person normally resident in New Zealand spending at least one night away from their usual place of residence.
VFR	Visiting friends and relatives – usually used in association with the reason for visiting a specific place. Can be related to a 'Day Trip' or 'Overnight Stay'.
FIT	Free and Independent Traveller - not prepaid for any items (excluding international airfares) before arriving in New Zealand.
SIT	Semi Independent Traveller - paid for at least one item (excluding international airfares before arriving in New Zealand, but none of these arrangements are part of a package tour.

Chapter 3
Visitor Profile

3.1 International Visitors

The International Visitor Survey (IVS) provides key information on international visitor behaviour in New Zealand. Over 5,000 departing visitors are interviewed each year in over 11 different languages at Auckland, Wellington and Christchurch airports. The IVS excludes all visitors under the age of 15 years. This sector accounts for approximately eight per cent of all international visitors. All the information in this section (3.1) is based on the IVS data.

Table 3
How Many International Visitors Does Canterbury Receive?

Market	Year Ending December 1998 000s	Year Ending December 1999 000s	Year Ending December 2000 000s	Year Ending December 2001 000s
Visitor Numbers	588.1	659.1	702.0	735.1
Visitor Nights	3,079.5	3,510.7	3,373.4	3,337.8

Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

- The trend is for increasing visitor numbers to the region over the period with numbers growing by 25 per cent (8.3% per year) and visitor nights by eight per cent (2.7% per year) 1998 to 2001.

Table 4
Who Visits Christchurch?

Market	Year Ending December 1998		Year Ending December 1999		Year Ending December 2000		Year Ending December 2001	
	000s	%	000s	%	000s	%	000s	%
Australia	127.5	23	142.3	22	146.2	22	163.7	23
UK	75.6	13	77.4	12	87.2	13	97.6	14
USA	80.5	14	90.4	14	98.5	15	96.3	14
Japan	95.6	17	96.9	15	97.8	14	85.7	12
Germany	25.1	4	27.0	4	30.5	5	32.1	5
South Korea	0	0	6.9	1	14.4	2	20.6	3
Singapore	13.9	3	22.0	4	20.0	3	20.3	3
Taiwan	20.8	4	21.0	3	20.5	3	14.3	2
Hong Kong	15.8	3	15.3	2	13.4	2	14.0	2
Other Countries	110.5	20	140.0	22	148.3	22	160.3	23
Total	**565.3**	**100**	**639.2**	**100**	**676.8**	**100**	**704.9**	**100**

Note: Figures may not total due to rounding.
Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

- Visitor numbers to Christchurch have grown by 25 per cent over the period 1998 to 2001.
- Approximately 96 per cent of all visitors to Canterbury include Christchurch in their stay.

- While most of the major markets have shown considerable growth over the period (Australia – 28%. UK – 29% and USA – 20%) the market share of the countries remains similar. The exception is Japan, which has lost 10,000 visitors and five per cent market share over the period.
- 63 per cent of all international visitors to Christchurch come from Australia, UK, USA and Japan.

Table 5
Why Do Visitors Come to Christchurch?

Market Year Ending 2001	Hol/Vac		VFR		Business		Other		Total	
	000s	%	000s	%	000s	%	000s	%	000s	%
Australia	117.1	21	18.4	31	19.8	39	8.4	23	163.7	100
UK	75.5	14	16.1	27	2.9	6	3.1	8	97.6	100
USA	79.0	14	4.0	7	6.0	12	7.8	21	96.3	100
Japan	72.2	13	2.3	4	4.2	8	7.1	19	85.7	100
Germany	30.6	6	0.3	1	0.9	2	0.3	1	32.1	100
South Korea	13.6	2	2.7	5	3.0	6	1.3	3	20.6	100
Singapore	18.6	3	0.8	1	0.8	2	0	0	20.3	100
Taiwan	12.9	2	1.0	2	0	0	0.5	1	14.3	100
Hong Kong	13.1	2	0.4	1	0.2	<1	0.3	1	14.0	100
Other Countries	123.5	22	15.0	25	13.5	10	8.5	23	160.3	100
Total	**556.1**	**100**	**61.0**	**100**	**51.3**	**100**	**37.3**	**100**	**704.9**	**100**

Note: Figures may not total due to rounding.
Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

- 79 per cent of all visitors to Christchurch are here for a holiday, nine per cent to visit friends and relatives, seven per cent for business and five per cent for other activities.
- 62 per cent of holiday visitors come from four markets (Australia, UK, USA and Japan).

Table 6
How Many Nights in Christchurch Are Generated by Each Market?

Market	Year Ending December 1998		Year Ending December 1999		Year Ending December 2000		Year Ending December 2001	
	000s	**%**	**000s**	**%**	**000s**	**%**	**000s**	**%**
UK	325.4	13	363.0	12	395.0	15	615.0	19
Australia	454.7	18	635.6	22	448.8	17	575.9	18
Japan	470.8	19	653.0	22	535.9	20	439.8	14
USA	261.4	10	242.6	8	224.2	8	339.2	11
South Korea	0	0	13.6	1	91.4	3	133.0	4
Germany	108.5	4	98.8	3	138.8	5	100.2	3
Taiwan	98.2	4	53.3	2	29.4	1	76.2	2
Singapore	115.0	5	63.4	2	67.6	3	60.6	2
Hong Kong	33.7	1	29.7	1	20.3	1	28.5	1
Other Countries	639.5	25	791.2	27	717.1	27	860.3	27
Total	**2507.2**	**100**	**2944.2**	**100**	**2668.5**	**100**	**3228.7**	**100**

Note: Figures may not total due to rounding.
Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

- Total visitor nights to Christchurch have increased over the period 1998 to 2001 by 27 per cent (9% average increase per year).
- The UK now provides the largest number of visitor nights despite having 50,000 fewer visitors to Christchurch than Australia – that is UK visitors stay longer in the city.
- Since 1999 Christchurch has lost over 213,00 visitor nights from the Japanese market due, in the main, to the poor state of the Japanese economy.
- The South Korean market has increased significantly from a very low base in 1998 to 133,000 visitor nights in 2001.

Table 7
How Long Does Each Visitor Stay in Christchurch?

Country	Average Length of Stay - 2001 (Nights)
UK	6.3
Australia	3.5
Japan	5.1
USA	3.5
South Korea	6.5
Germany	3.1
Taiwan	5.3
Singapore	3.0
Hong Kong	2.0
Other Countries	5.4

Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

- The length of stay is an important measure of success as it has a major influence on the economic benefit from tourism – the longer visitors stay the more they are likely to spend.
- The longer length of stay of the UK market is the major determinant in the increase in visitor nights from that market.
- The length of stay of the Asian markets is influenced by the large number of language students in Christchurch and is not necessarily a reflection of visitors on holiday staying longer. Due to the size of the English language market it may be appropriate to undertake specific research on their length of stay.

Table 8
What Type of Accommodation Do Visitors Stay in?

Accommodation Type	Year Ending December 1998 Nights (000s)	Year Ending December 1999 Nights (000s)	Year Ending December 2000 Nights (000s)	Year Ending December 2001 Nights (000s)
Private Home/Friends	836.9	820.8	525.3	776.7
Hotel	585.7	712.4	721.6	769.0
Student Accommodation	277.6	418.2	312.2	472.5
Backpackers/Hostel	282.3	308.9	417.7	384.5
Motel	300.9	282.1	232.0	328.6
Rented Accommodation	100.6	195.6	232.5	232.9
Farmstay/Homestay	42.1	76.2	98.5	100.3
Caravan/Campervan	64.8	61.9	65.8	63.0
Cabin/Tourist Flat	8.1	11.8	14.7	40.4
Tent Site	31.3	19.7	18.1	26.8
Luxury Lodge	1.5	8.4	18.3	6.0
Other	10.1	26.4	10.4	27.6
Total Accommodation Nights	**2541.9**	**2942.4**	**2667.1**	**3228.3**

Note: Figures may not total due to rounding.
Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

- Staying with friends and relatives and staying in hotels account for 24 per cent each of total visitor nights (2001).
- Student accommodation nights have grown from 11 per cent (1998) to 15 per cent (2001) of all visitor nights, while the growth in visitor nights for student accommodation is 70 per cent over the period.
- Backpacker accommodation nights have increased by 36 per cent over the period.

Table 9
How Long Do Visitors Stay in Specific Types of Accommodation?

Market	Year Ending December 1998 Nights	Year Ending December 1999 Nights	Year Ending December 2000 Nights	Year Ending December 2001 Nights
Student accommodation	*	39	32	39
Private Home/Friends	16	15	9	11
Farmstay/Homestay	4	5	5	5
Backpackers/Hostel	4	4	4	4
Tent Site	4	3	3	3
Caravan/Campervan	3	3	3	3
Motel	3	3	3	3
Hotel	3	3	3	3
Other	12	15	15	17
Total Average Accommodation Nights	**5**	**10**	**8**	**9**

Source: International Visitor Survey (IVS) – excludes visitors under 15 years.
Note: *Number suppressed, based on sample size of less than 30 responses.

- The overall average length of stay (previous table) is clearly influenced by language students (student accommodation, private home/friends and other) in Christchurch for considerably longer periods than the average holiday stay.
- For the international holiday visitor staying in commercial accommodation the length of stay is reported as around two nights (CAM).

Table 10
When Do International Visitors Come to Christchurch?

Monthly Arrival Shares (%) by Origin Region - 2001								
Month	**Australia**	**America**	**Japan**	**Asia**	**UK/Nrth Ireland**	**Europe**	**Other**	**Total**
January	8.6	10.3	9.9	11.1	13.9	13.8	9.6	10.5
February	9.5	13.3	10.8	7.8	15.2	15.3	8.8	10.6
March	9.4	10.9	10.0	8.4	9.4	9.1	8.6	9.4
April	9.1	6.9	7.5	9.8	6.6	5.2	8.5	8.1
May	6.4	5.2	6.2	7.6	4.0	3.3	6.5	5.9
June	7.1	6.4	4.9	6.6	3.8	2.6	6.7	6.0
July	8.0	7.4	8.3	8.4	5.1	4.6	7.9	7.4
August	8.7	5.7	10.3	6.3	4.3	4.6	7.1	7.0
September	9.3	4.4	6.5	6.3	4.2	5.1	6.9	6.7
October	7.5	7.1	5.4	7.2	6.6	9.6	7.7	7.3
November	7.6	8.6	6.6	7.5	9.5	13.9	8.7	8.4
December	11.9	10.7	9.1	11.9	14.6	13.6	14.3	12.3
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Note: Assumes Christchurch share is the same as New Zealand.
Numbers may not total 100 per cent due to rounding.
Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

Figure 1
Monthly Share of International Visitors - Christchurch

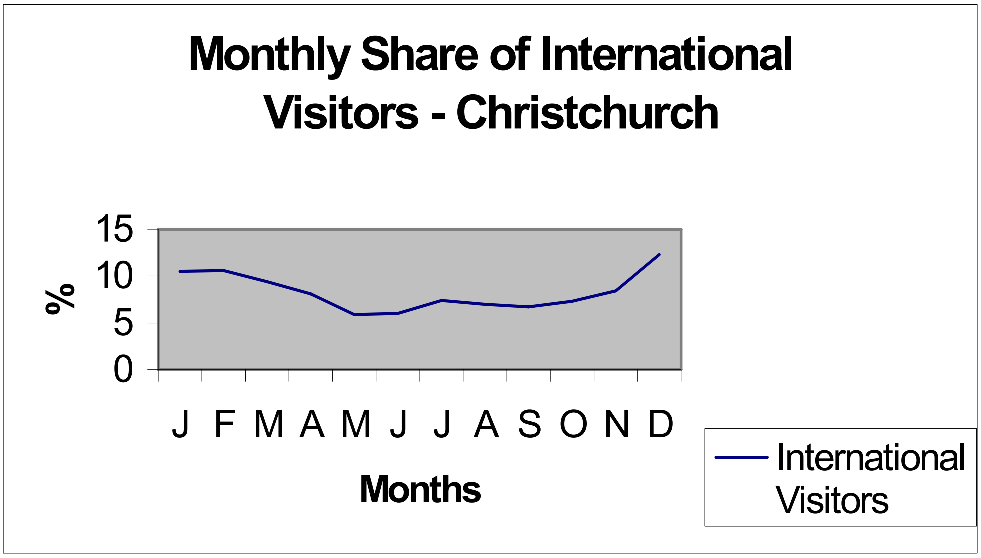


Table 11
Average Number of Visitors Per Month

Average No of Visitors Per Month (000s)	Months – Year 2001 (000s)											
	Jan	**Feb**	**Mar**	**Apr**	**May**	**June**	**July**	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**
	74.0	74.7	66.3	57.1	41.6	42.3	52.2	49.4	47.2	51.5	59.2	86.7

Source: Derived from International Visitor Survey – excludes visitors under 15 years.

- In total, there are distinct peak months (January, February, March and December) while individual markets have their own distinctiveness.
- Visitors from Europe have a distinct preference for visiting New Zealand during the summer months with four/five times as many visitors in February than June.
- Australia and Asia have a more even spread throughout the year.

Table 12
Average Number of Visitors Per Day

Average No of Visitors Per Day (000s)	Months – Year 2001 (000s)											
	Jan	**Feb**	**Mar**	**Apr**	**May**	**June**	**July**	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**
	11.9	13.3	10.7	9.5	6.7	7.1	8.4	8.0	7.9	8.3	9.9	14.0

Source: Derived from International Visitor Survey – excludes visitors under 15 years.

- Almost twice as many international visitors arrive in December as June.
- November to April are the peak months with an average of between 9,500 to 14,000 visitors per day.
- The average for March (IVS data) closely matches the Census Night (6^{th} March 2001) data when 9,426 visitors were in Christchurch.

Table 13
What Do International Visitors 'See and Do' in Canterbury?

Market	Year Ending December 1998 000s	Year Ending December 1999 000s	Year Ending December 2000 000s	Year Ending December 2001 000s
Botanical/Gardens	140.6	152.4	173.4	154.1
Sightseeing Tour	140.9	151.9	130.3	109.6
Museum/Gallery	94.4	95.2	117.1	90.0
Antarctic Centre	38.8	37.3	35.5	60.0
Gondola	27.6	25.6	32.9	45.1
Historic Buildings	25.0	46.8	51.6	36.5
Scenic Drive	27.5	36.6	49.5	31.4
Beaches	20.8	25.5	26.4	31.4
Casino	25.4	24.5	19.0	18.2
Trekking/Tramping	12.9	9.2	9.5	14.2
Train/Trans Alpine	3.1	10.7	12.3	8.7
Golf	*	*	*	.9
Scenic Cruises	7.7	*	*	.9
Farm Show	*	*	*	.8
Concert/Theatre	.3	8.4	6.1	.5
Total Visitors to Christchurch	**583.0**	**624.1**	**663.6**	**602.3**

Note: *Number suppressed, based on sample size of less than 30 responses.
Figures may not total due to rounding.

Source: International Visitor Survey (IVS) – excludes visitors under 15 years

- Three activities form the basis of what visitors 'see and do' in Christchurch – visiting the Botanic Gardens and other gardens, taking a sightseeing tour and visiting a museum (probably Canterbury) or art gallery (probably McDougall).
- The International Antarctic Centre, Gondola and Casino are the only other individual attractions identified.

Table 14
Is This the First Visit to Christchurch?

Market	Year Ending December 1998 000s (%)	Year Ending December 1999 000s (%)	Year Ending December 2000 000s (%)	Year Ending December 2001 000s (%)
First Trip to NZ	412.3 (73)	475.7 (74)	519.5 (77)	521.8 (74)
Repeat Trip to NZ	153.9 (27)	162.9 (26)	157.2 (23)	183.2 (26)
Total Visitors to Christchurch	**566.1 (100)**	**638.6 (100)**	**676.7 (100)**	**705.0 (100)**

Note: Figures may not total due to rounding.
Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

- Approximately 75 per cent of all international visitors are on their first trip to Christchurch.

Table 15
What Type of Trip Did Visitors to Christchurch Take?

Market	Year Ending December 1998 000s (%)	Year Ending December 1999 000s (%)	Year Ending December 2000 000s (%)	Year Ending December 2001 000s (%)
Total Package Traveller[1]	194.4 (34)	219.1 (34)	253.7 (37)	221.2 (31)
Total Independent Traveller[2]	371.8 (66)	419.5 (66)	423.0 (63)	483.8 (69)
Total Visitors to Christchurch	**566.1 (100)**	**638.6 (100)**	**676.7 (100)**	**705.0 (100)**

1. Total Package Traveller comprises tour group trips and package travellers. Tour group travellers have booked their trip at home with a tour group. Package travellers are not part of a tour group but paid for international airfares, accommodation and at least two other items (domestic airfares, meals) before arriving in New Zealand.
2. The category Total Independent Traveller comprises semi-independent travellers and free independent travellers. Semi-independent travellers paid for at least one item (excluding international airfares) before arriving in New Zealand, but none of these arrangements are part of a package tour. Free independent travellers (FIT) have not prepaid for any items (excluding international airfares) before arriving in New Zealand.

Note: Figures may not total due to rounding.
Source: International Visitor Survey (IVS) – excludes visitors under 15 years.

- Approximately two-thirds of all international visitors to Christchurch are FITs (Free and Independent Travellers).
- The ability to influence the decision making of the FIT traveller at the destination to stay longer and 'see and do more things' is much more likely than for the package traveller.

3.2 Domestic Visitors

Table 16
Where Do Canterbury's Domestic Visitors Come from?

Origin	Trips (000s)			Visitor Nights (000s)		
	1999	**2000**	**2001**	**1999**	**2000**	**2001**
Northland	11	1	Not Available	76	7	Not Available
Auckland	175	193		903	885	
Waikato	43	26		207	111	
Bay of Plenty	17	9		133	60	
Gisborne	6	3		50	28	
Hawkes Bay	21	6		122	27	
Taranaki	1	7		10	77	
Man/Wang	31	30		123	141	
Wellington	108	116		506	607	
North Island Total	***413***	***391***		***2,130***	***1,943***	
Marlborough	94	71		337	227	
Nelson/Tasman	104	62		333	178	
Canterbury	803	884		1,960	2,630	
West Coast	78	58		180	137	
Otago	260	278		932	814	
Southland	64	89		208	292	
South Island Total	***1403***	***1442***		***3,950***	***4,278***	
Total	**1,814**	**1,836**	**2,332**	**6,080**	**6,221**	**7,034**

Note: *Subject to sampling variability in excess of 50 per cent
Figures may not total due to rounding.

Source: New Zealand Domestic Travel Study 1999, 2000 and 2001

- Total trips have increased 29 per cent and visitor nights have increased 16 per cent over the period 1999-2001.
- The main difference between 1999 and 2000 is the increased trips from the South Island and associated increase in visitor nights.
- The average length of stay for visitors from the North Island is longer, but the number of trips and visitor nights is considerably less for 1999 and 2000.
- Forty eight per cent of all trips and 33 per cent of all visitor nights come from Canterbury people travelling within the region for 1999 and 2000. It can be assumed that 2001 will provide a similar result to the previous years.

Table 17
How Long Do They Stay?

Origin	Average Length of Stay (Nights)		
	1999	**2000**	**2001**
Northland	6.9	7.0	Not Available
Auckland	5.2	4.6	
Waikato	4.8	4.3	
Bay of Plenty	7.8	6.8	
Gisborne	8.3	9.3	
Hawkes Bay	5.8	4.5	
Taranaki	10.0	11.0	
Man/Wang	4.0	4.7	
Wellington	4.7	5.2	
North Island Total	***5.2***	***4.9***	
Marlborough	3.6	3.2	
Nelson/Tasman	3.2	2.9	
Canterbury	2.4	3.0	
West Coast	2.3	2.4	
Otago	3.6	2.9	
Southland	3.3	3.3	
South Island Total	***2.8***	***3.0***	
Total	**3.4**	**3.4**	**3.0**

Note: * Subject to sampling variability in excess of 50%.
Source: New Zealand Domestic Travel Study 1999, 2000 and 2001.

- North Island visitors tend to stay longer, probably due to the increased time and costs to reach Canterbury, which encourages longer stays.

Table 18
Why Do People Visit Canterbury?

Main Reason	Trips 000s(%)			Visitor Nights 000s (%)		
	1999	2000	2001	1999	2000	2001
VFR	600 (33)	512 (28)	653 (28)	1,994 (33)	2,173 (35)	2,462 (35)
Holiday/Leisure	778 (43)	863 (47)	1,096 (47)	2,757 (45)	3,001 (48)	3,376 (48)
Business	304 (17)	283 (15)	350 (15)	876 (14)	632 (10)	703 (10)
Other	132 (7)	180 (10)	233 (10)	455 (7)	415 (7)	492 (7)
Total	**1,814**	**1,836**	**2,332**	**6,081**	**6,221**	**7,034**

Note: Figures may not total due to rounding.
Assumes the same proportion of trips for 2001 as 2000.
Source: New Zealand Domestic Travel Study 1999, 2000 and 2001.

- Holidays and visiting friends and relatives account for 75 per cent of all trips and around 80 per cent of all visitor nights.

Table 19
How Long Do Different Types of Visitors Stay in Canterbury?

Main Reason	Average Length of Stay (Nights)		
	1999	2000	2001
VFR	3.3	4.2	Not Available
Holiday/Leisure	3.5	3.5	
Business	2.9	2.2	
Other	3.4	2.3	
Total	**3.4**	**3.4**	**3.0**

Source: New Zealand Domestic Travel Study 1999, 2000 and 2001.

- Typically people visiting friends and relations stay longer as in many cases they will be staying with them and so removing the accommodation costs.

Table 20
Where Do Domestic Visitors Stay in Canterbury?

Accommodation Type (Visitor Nights)	1999 000s (%)	2000 000s (%)	2001 000s (%)
Private home of friend/ relative	**3,083 (51)**	**3,191 (51)**	**3,587 (51)**
Licensed Hotel/Motel	**669 (11)**	**678 (11)**	**774 (11)**
- motel with restaurant	231 (4)	218 (4)	281 (4)
- mid-range hotel	304 (5)	292 (5)	352 (5)
- top class hotel	134 (2)	168 (3)	211 (3)
Camping Ground	**590 (10)**	**641 (10)**	**703 (10)**
- tent site	225 (4)	286 (5)	352 (5)
- cabin	158 (3)	118 (2)	141 (2)
- caravan site	207 (3)	230 (4)	281 (4)
Unlicensed Motel	**657 (11)**	**628 (10)**	**703 (10)**
Other	**632 (10)**	**597 (10)**	**703 (10)**
- backpackers	116 (2)	124 (2)	141 (2)
- rented	140 (2)	162 (3)	211 (3)
- other	377 (6)	311 (5)	352 (5)
Holiday home/bach	**462 (8)**	**491 (8)**	**563 (8)**
Total	**6,080 (100)**	**6,221 (100)**	**7,034 (100)**

Note: Figures may not total due to rounding.
Assumes the same proportions for 2001 as 2000.

Source: Based on New Zealand Domestic Travel Survey 1999, 2000 and 2001.

- Over 50 per cent of visitor nights are spent staying with friends and relatives.
- 21 per cent stay in hotels/motels.

Table 21
How Do Domestic Visitors Travel to Canterbury?

Travel Mode	1999 000s (%)	2000 000s (%)	2001 000s (%)
Private/Company Car/Van	1,468 (81)	1,487 (81)	1,889 (81)
Air Travel	176 (10)	180 (10)	233 (10)
Bus/Coach	42 (2)	42 (2)	47 (2)
Rental Car/Van	40 (2)	42 (2)	47 (2)
Commercial Bus/Ferry	34 (2)	51 (2)	47 (2)
Inter-island Ferry	27 (1)	28 (1)	23 (1)
Train	16 (1)	17 (1)	23 (1)
Other	53 (3)	61 (3)	70 (3)
Total	**1,814 (100)**	**1,836 (100)**	**2,332 (100)**

Note: Figures may not total due to rounding.
Assumes the same proportions for 2001 as 2000
Source: Based on New Zealand Domestic Travel Survey 1999, 2000 and 2001.

- Private or company vehicles are used by over 80 per cent of visitors as their main form of transport when visiting Canterbury.
- Nationally 30 per cent of business travellers use air travel.

Table 22
What Do Domestic Visitors 'See and Do' in Canterbury?

Activity	1999 (%)
Visit friends/relatives	37.6
Dine at a café/restaurant	26.5
Scenic drive/sight seeing	20.1
Shopping	19.8
Go to a bar or night club	10.6
Walking	9.7
Fishing	7.0

Note: Multiple response question.
Percentages do not total 100.
Assumes Canterbury reflects the national position..
Source: Based on New Zealand Domestic Travel Survey 1999.

- Unlike international visitors, domestic visitors are less likely to visit attractions and participate in formal commercial activities such as jet boating, rafting etc.

3.3 Day Visitors

Table 23
Where Do Canterbury's Day Visitors Come From?

Origin	1999 000s	Share (%)	2000 000s	Share (%)	2001 000s	Share (%)
Northland	*-	-	*-	-	Not available	Not available
Auckland	*28	*0.5	*34	*0.7		
Waikato	*40	*0.8	*20	*0.4		
Bay of Plenty	*4	*0.1	*-	-		
Gisborne	*-	-	*-	-		
Hawkes bay	*-	-	*9	*0.2		
Taranaki	*-	-	*-	-		
Man/Wanganui	*-	-	*6	*0.1		
Wellington	*58	*1.1	*28	*0.6		
Marlborough	*15	*0.3	*8	*0.2		
Nelson/Tasman	*85	*1.7	*53	*1.1		
Canterbury	4,612	89.3	4,403	90.1		
West Coast	*55	*1.1	*34	*0.7		
Otago	*248	*4.8	234	4.8		
Southland	*16	*0.3	*17	*0.4		
Total	**5,166**	**100**	**4,844**	**100**		

Note: * Subject to sampling variability in excess of 50 per cent.
Figures may not total due to rounding.
Source: New Zealand Domestic Travel Survey 1999, 2000 and 2001

- 90 per cent of all day visitors to Canterbury are from the region, with only a very small proportion travelling from other mainly South Island regions.

Table 24
Why Do People Visit Canterbury?

Main Reason	1999 000s (%)	2000 000s (%)	2001 000s (%)
Holiday/Leisure	**2,278 (44)**	**2,097 (43)**	Not Available
- holiday	548 (11)	**596 (12)**	
- play/associated with sport	413 (8)	**247 (5)**	
- attend concert/sports match/public event	191 (4)	**199 (4)**	
- to get away	589 (11)	**567 (12)**	
- shopping	542 (10)	**499 (10)**	
Visiting Friends and Relatives	**1,333 (26)**	**1,172 (24)**	
- visiting friends	486 (9)	**397 (8)**	
- visiting relatives	708 (14)	**664 (14)**	
- attend wedding/funeral/ family occasion	139 (3)	**107 (2.2)**	
Business	**935 (18)**	**882 (18.2)**	
- business	914 (18)	**862 (17.8)**	
- conference	21 (<1)	**15 (0.3)**	
Other	**620 (12)**	**693 (14.3)**	
Total	**5,166 (100)**	**4,844 (100)**	

Note: Figures may not total due to rounding.
Source: Based on New Zealand Domestic Travel Survey 1999, 2000 and 2001.

- Almost 70 per cent of all day trips are for holiday/leisure activities or visiting friends and relatives.

Table 25
What Do Day Visitors 'See and Do' in Canterbury?

Activity	1999 (%)
Visit friends/relatives	27.6
Shopping	23.1
Dine at a café/restaurant	16.9
General sight seeing	10.1
Food/drink/refreshments	6.5
Beach walk/play	6.4

Note: Assumes Canterbury reflects the national position.
Source: Based on New Zealand Domestic Travel Survey 1999.

- Day visitors like domestic visitors are less likely to visit attractions and participate in formal activities such as jet boating, rafting etc.

Table 26
How Do Day Visitors Travel to Canterbury?

Travel Mode	1999 000s (%)	2000 000s (%)	2001 000s (%)
Private/Company Car/Van	4,742 (92)	4,447 (92)	Not Available
Air Travel	67 (1)	87 (2)	
Bus/Coach	98 (2)	82 (2)	
Commercial Bus/Ferry	119 (2)	78 (2)	
Rental Car/Van	26 (<1)	34 (1)	
Train	41 (1)	19 (<1)	
Other	124 (2)	140 (3)	
Total	**5,166 (100)**	**4,844 (100)**	

Note: Figures may not total due to rounding.
Source: Based New Zealand Domestic Travel Survey 1999, 2000 and 2001.

- Private and company vehicles are used by over 91 per cent of all day visitors as their main means of transport.

3.4 Conventions and Events

3.4.1 Conventions

A report commissioned by Christchurch & Canterbury Convention Bureau in June 2002 provided important research regarding the convention industry in Christchurch. In this section the current number of visitors to Christchurch for conventions is detailed. The accuracy of this information is influenced by methodology used by Ernst & Young to collect the data. This is addressed in Section 4 – Visitor Industry Performance.

The term 'convention' is used to cover meetings of at least 15 people staying overnight and excluding incentive meetings.

Table 27
Numbers of Conventions (2001)

Association	Corporate
2001	**2001**
130	263

Source: Ernst & Young Survey for Conventions New Zealand.

Table 28
Numbers of Delegates – Association (2001)

Australian	Other International	Local	Domestic	Total
1,907	4,353	5,017	10,930	22,207

Source: Ernst & Young Survey for Conventions New Zealand.

Table 29
Number of Delegates – Corporate (2001)

Australian	Other International	Local	Domestic	Total
5,180	2,441	6,884	5,143	19,648

Source: Ernst & Young Survey for Conventions New Zealand.

Table 30
Conventions

	Association	Corporate	All Conventions
Average Size of Convention – Delegates (2001	171	75	107
Average Length of Conventions - Days (2001)	3.1	2.8	2.9

Table 31
Number of Visitor Nights

	International	Domestic	Total
Association (2001)	19,406	33,883	53,289
Corporate (2001)	21,339	14,400	35,739

Source: Ernst & Young Survey for Conventions New Zealand.

- Despite being an important source of business for accommodation (mainly hotel) providers, the convention market is small when compared with the much larger holiday/leisure market. For the international market the total visitor nights accounts for just over 1 per cent of the total market.

3.4.2 Events

While Christchurch has some of the best event facilities in New Zealand, little research appears to have been completed on this sector. The only data collected are those by the Christchurch City Council, which is mostly related to festivals. Detailed below is the current information available on Christchurch events.

Table 32
Christchurch Events

Festival Event	Year of Festival	Attendances
Festival of Flowers[1]	2002	250,000
World Buskers Festival	2002	180,000
Christchurch Arts Festival	2001	93,549
Coca Cola Christmas in the Park[2]	2001	50,000
Montana Winter Carnival	2001	45,000
Festival of Romance[3]	2002	40,000
Jazz Festival	2000	30,720
Carols by Candlelight	2001	25,000
Adventure Festival	2002	16,631
Books and Beyond	2001	8,500
UA 2002	2002	6,605
Primary Schools Cultural Festival	2001	5,466
Cello Festival	2001	4,646
Waitaha Cultural Festival	2001	1,340

Note:
1. Particular caution advised with estimated number of participants.
2. Rain affected.
3. Special circumstances.

Participant Numbers

The numbers given to the Council for those participating in festivals and events are notoriously unreliable and should be treated as such. In addition to the temptation for events organisers to 'exaggerate' participant numbers to help justify their funding, there are also genuine logistical issues related to estimating the number of people at some events. An example is the large scale concerts at Hagley Park at which only a broad 'gut feel' estimate can be given. Similarly events that take place in busy public places e.g. Buskers Festival and Festival of Flowers create real issues of how one determines who is there for the event and who is there for other reasons. If someone glances at a display of flowers in Cathedral Square that has been erected as part of the Festival of Flowers, should they count as a participant?

Alan Bywater; Christchurch City Council

It appears that there is no structure in place to obtain reliable information on the number of events, participants and economic benefits associated with the many regional and national events that place in Christchurch each year.

3.5 Benchmarking

Background and Objectives

A face-to-face interview survey of visitors to Christchurch was commissioned by Christchurch and Canterbury Marketing Ltd (CCML) and undertaken by the Tourism & Leisure Group Limited during late March and April 2001.

The survey was commissioned following a study in 2000 that identified a shortfall in information on the behaviour of visitors to Christchurch. In particular, there was little information on activities undertaken by visitors while in Christchurch. Visitor views and opinions of infrastructure and service attributes essential to the tourism industry and ultimately visitor satisfaction with a tourist destination also surveyed are reported in Section 4.1 – Visitor Industry Performance.

A total sample of 578 was achieved in 28 interviewing sessions on 28 separate days between 31st March and 29th of April 2001. This included the school Easter holidays.

Attractions and Places of Interest Visited

In Christchurch the most visited attractions are all located in the central city and many of them are free to visitors – Cathedral Square (80%), Botanic Gardens (67%), Arts Centre (66%), Christchurch Cathedral (47%), Canterbury Museum (39%) and Christchurch Tram (30%). The ability of some attractions on the edge of the city to increase their penetration of the visitor market will be further challenged as the focus on the central city increases with major developments such as the new art gallery. The full results are detailed in the table below.

Table 33
Attractions Visited

Base Number: 1,100 visitors, 6105 visits	**%**	**Count**
Cathedral Square	80	878
Shopping	71	779
Botanic Gardens	67	736
Arts Centre	66	725
Christchurch Cathedral	47	516
Canterbury Museum	39	425
Christchurch Tram	30	333
Antarctic Centre	28	313
Christchurch Gondola	24	261
Robert McDougall Art Gallery	18	198
Punting on the Avon	17	182
Christchurch Casino	14	152
Aquarium (Southern Encounter)	11	118
Willowbank Wildlife Reserve	10	113
Mona Vale	9	100
Orana Park	9	96
Airforce World	5	55
Science Alive	5	55
Ferrymead Historic Park	4	42
Nga Hau e Wha Marae	3	28

Note: Multiple response question. Percentages do not total 100.
Source: Destination Benchmarking Study for Christchurch & Canterbury Marketing.

The popular places to visit in Canterbury outside Christchurch are – Mount Cook (37%), Akaroa (37%), Kaikoura (36%), Lake Tekapo (33%), Arthurs Pass (31%) and Hanmer Springs (27%). This indicates that visitors to Christchurch also visit a wide range of other Canterbury locations. The full results are detailed in the table below.

Table 34
Places Visited

BaseNumber : 1,100 visitors, 5,149 visits	%	Count
Akaroa	37	403
Mount Cook	37	401
Kaikoura	36	400
Lake Tekapo	33	364
Arthur's Pass	31	346
Lyttelton	29	322
Hanmer Springs	27	295
Timaru	24	264
Ashburton	22	238
Twizel	19	209
Geraldine	17	190
Fairlie	11	122
Rangiora	8	87
Waipara	8	82
Kaiapoi	7	73
Oxford	7	72
Methven	6	61
Waimate	4	42
Queenstown	62	679
Dunedin	46	500

Note: Multiple response question. Percentages do not total 100.
Source: Destination Benchmarking Study for Christchurch & Canterbury Marketing.

Queenstown (62%) and Dunedin (46%) are popular destinations outside Canterbury and this indicates that many visitors to Christchurch are also visiting other destinations in the South Island as a part of their visit to Christchurch.

3.6 Census Night Data

Census Night (6 March 2001) is the one occasion when a comparison between residents and visitors to a specific destination can take place. The table below provides an indication of the impact of international and domestic visitors on the population of Christchurch, and on the infrastructure and service needs they make of the city.

Table 35
Census Night Data

Category	Number	% of Total
Usually resident population	316,227	
Census night resident population	308,691	95
International visitors in Christchurch	9,426	3
Domestic visitors in Christchurch	6,183	2
Total	324,300	100

Source: Census 2001 (Statistics New Zealand).

3.7 Assumptions:

- The Census Night data are representative in terms of the number of Christchurch residents staying elsewhere in New Zealand or overseas.

3.8 Key Points

- With the exception of December, March is the busiest month of the year for international visitors to New Zealand.
- The number of visitors (international and domestic) in Christchurch increased the size of the usually resident population on Census Night by 8,073 (2.6%).
- While there will be fluctuations in the three categories that influence the total population of Christchurch on any one night, it seems likely that the Census Night population is representative of a typical night and the changes that will occur with international and domestic visitors is unlikely to dramatically alter the Census Night percentages.

Chapter 4
Visitor Industry Performance

4.1 Visitor Satisfaction

4.1.1 Visitors' Views and Opinions on Christchurch

The Destination Benchmarking study referred to previously, obtained visitors views and opinions for a number of facilities and services used by visitors to Christchurch. These were rated on a scale of 1 (very poor) to 5 (very good). The average score (out of 5) for each attribute evaluated is detailed in the table on the following page.

Table 36
Visitors' Views and Opinions on Christchurch

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

Source: Destination Benchmarking Study for Christchurch & Canterbury Marketing.

4.1.2 What Visitors Particularly Like About Christchurch and Suggested Improvements

Visitors to Christchurch were very complementary in respect of its openness, the landscape and streetscape, the buildings and particularly the parks and gardens. The large number of people (95%) who mentioned what they liked about Christchurch is confirmation that the investment in Worcester Boulevard and other enhancements has a major impact on visitors' views of the city.

Visitors considered the people of Christchurch very friendly and found the city generally to be a relaxing place for a holiday.

Negative comments (21%) from those surveyed were mainly concerned with racist remarks and discrimination against Asian language students in particular and personal safety in some parts of Christchurch at night (e.g., Latimer Square). It will be critical to take action regarding the issues for Asian language students, as it has the potential to impact on this market which is estimated to be worth more than $100 million a year to the city (Canterbury Development Corporation). Proposed improvements to the east of the Square could help to make this area of the city a safer place for visitors. In the meantime it is important for visitors to be informed of those places that many Christchurch residents avoid at night and also a higher level of police presence could improve safety in some areas of the central city.

Suggested improvements came from 46 per cent of those surveyed and focused on improved traffic and pedestrian signage (14% of respondents) leading into and within the City, improvements to Cathedral Square (10%), more shops and longer opening hours (8%), more public toilets (5%), and increased bus services (3%). Four respondents specifically suggested no changes – they love it as it is!

4.2 International Visitor Expenditure

No regional visitor expenditure figures are available for the international market due to the way in which the information from the Internal Visitor Survey is collected and because of the small sample sizes in some cases. The table below lists the spend per visit nationally for some of the key visitor markets and assuming that visitor spending in Christchurch is typical of the national average, also lists the visitor spending per market segment for Christchurch.

Table 37
International Visitor Spend Year Ending December 2001

Key Markets	Spend Per Visit $	Spend Per Visit Christchurch $
Australia	1,744	525
UK	3,697	781
USA	4,363	1,043
Japan	4,414	1,403
Germany	3,765	388
South Korea	2,628	1,066
Average	**3,088**	**N/A**

Source: IVS

4.3 Domestic Visitor Expenditure

Table 38
Domestic Visitor Expenditure – Canterbury (2000)

Category	Visitor Expenditure $000s
Transport	153,347
Food	146,893
Accommodation	107,659
Alcohol	54,081
Recreation	36,293
Gifts/souvenirs	17,860
Gambling/casino	4,088
Other shopping	61,396
Total	**581,617**

Source: DTS, 2000

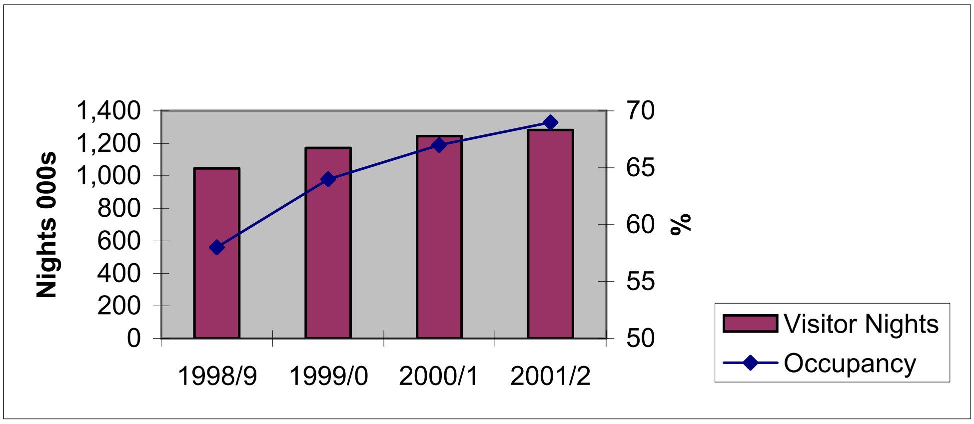
- With an average length of stay of 3.4 nights domestic visitors spend an average $317 per trip or $93 per day.

4.4 Accommodation (Christchurch)

The accommodation sector is a good barometer of the city's performance, as it incorporates a range of services to meet most requirements and the data available through the Commercial Accommodation Monitor (CAM) prepared by Statistics New Zealand provide an analysis of approximately 80 per cent of all commercial accommodation operations. The following tables and comments provide a summary of results and trends over the last four years.

4.4.1 Hotels

Figure 2
Christchurch Hotel Performance 1998 to 2002



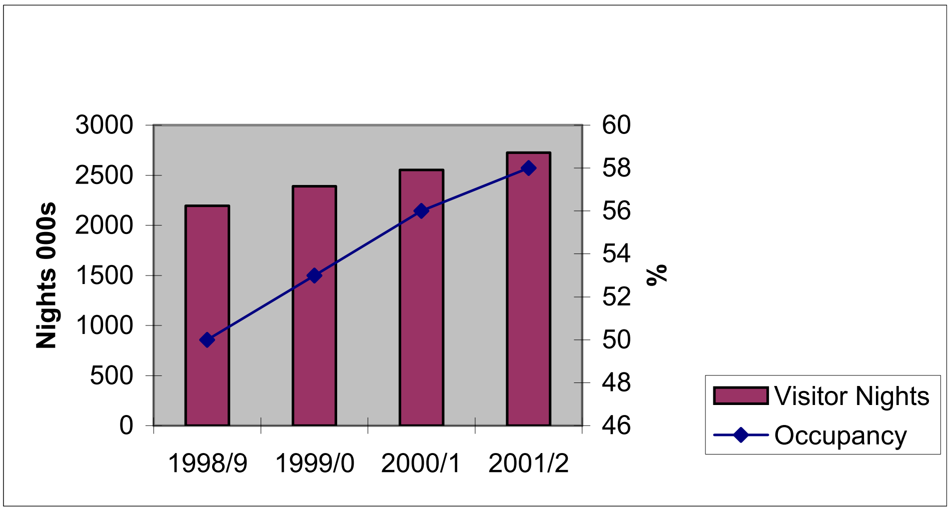
Source: Commercial Accommodation Monitor; Statistics NZ.

During the period 1998 to 2002 the number of hotels within the Christchurch CAM survey has remained around 32 properties.

- Annual visitor nights have increased significantly in Christchurch over the last four years for hotels from 1,046,000 to 1,282,000 (+23%). At the same time the annual average occupancy has increased from 58 per cent to 69 per cent.
- Visitor nights for the busiest month (February1999, 2000, March 2001 and March 2002) in each year have increased from 115,000 visitor nights to 149,000 (+29%). For the worst month in each year (July 1998, 1999, June 2001 and 2002) visitor nights have increased from 62,000 to 71,000 (+14%).
- The share of visitor nights across all months has remained relatively constant with six per cent for the worst months and between 11 and 12 per cent for the busiest months.
- The difference in visitor nights for the worst and best month over the four year period is increasing (53,000 in 1998/9 and 78,000 in 2001/2).

4.4.2 Motels

Figure 3
Christchurch Motel Performance 1998 to 2002

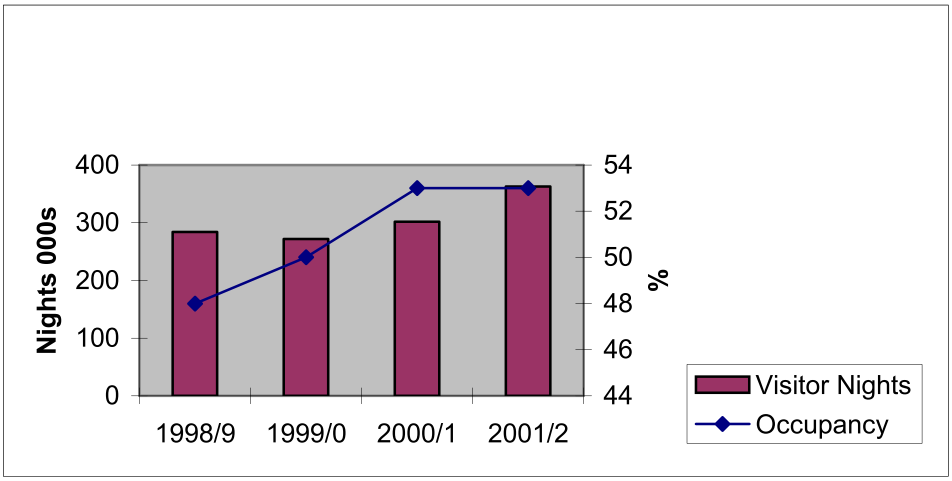


Source: Commercial Accommodation Monitor; Statistics NZ.

- During the period 1998 to 2002 the number of motels within the Christchurch CAM survey has increased from 89 to 102 properties.
- Annual visitor nights have increased significantly in Christchurch over the last four years for motels from 571,000 to 753,000 (+32%). At the same time the annual average occupancy has increased from 50 per cent to 58 per cent.
- Visitor nights for the busiest month (January 1999, 2000, 2001 and March 2002) in each year have increased from 59,000 visitor nights to 92,000 (+56%). For the worst month (May 1999, 2000, May/June 2001 and May 2002) in each year visitor nights have increased from 41,000 to 45,000 (+10%).
- The share of visitor nights across all months has remained relatively constant with six per cent for the worst months and between 10 and 12 per cent for the busiest months. The largest percentage change during the period was for 2001/02 with six per cent for the lowest and 12 per cent for the highest month.
- The difference in visitor nights for the worst and best month over the four year period is increasing (26,000 in 1998/9 and 47,000 in 2001/2).

4.4.3 Backpackers

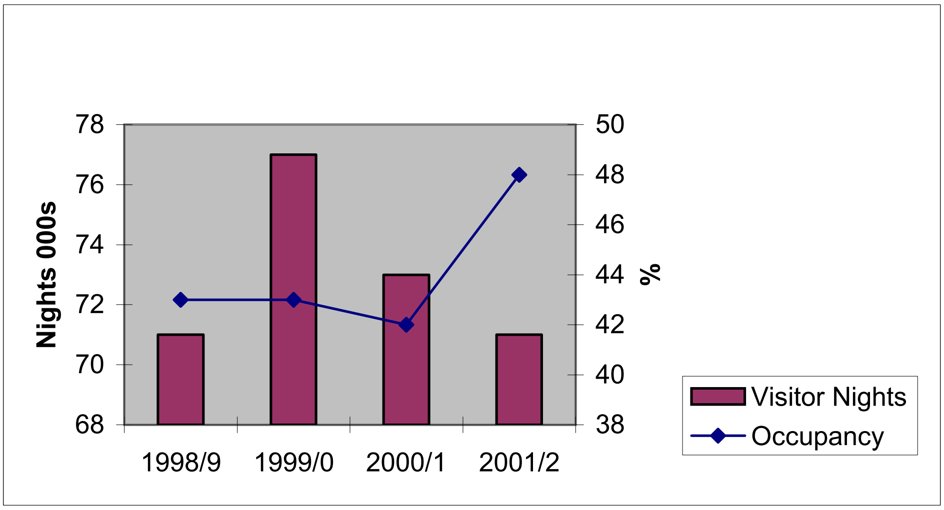
Figure 4
Christchurch Backpacker Performance 1998 to 2002



Source: Commercial Accommodation Monitor; Statistics NZ.

- During the period 1998 to 2002 the number of backpackers within the Christchurch CAM survey has remained stable at 16 to 17 properties.
- Annual visitor nights have increased significantly in Christchurch over the last four years for backpackers from 272,000 (1999/00) to 363,000 (+33%). At the same time the annual average occupancy has increased from 48 per cent to 53 per cent.
- Visitor nights for the busiest month (February 1999, 2000, January and March 2001 and March 2002) in each year have increased from 36,000 visitor nights to 44,000 (+22%). For the worst month (September 1998, June 2000, 2001 and September 2001) in each year visitor nights have increased from 17,000 to 22,000 (+29%).
- The share of visitor nights across all months has remained relatively constant with six per cent for the worst months and between 11 and 13 per cent for the busiest months. The largest percentage change during the period was for 1998/99 with six per cent for the lowest and 13 per cent for the highest month.
- The difference in visitor nights for the worst and best month over the four year period has decreased in 1998/99 and 1999/00 while increasing from 2000/01 (14,000) to 2001/02 (22,000).

Figure 5
Christchurch Hosted Performance 1998 to 2002

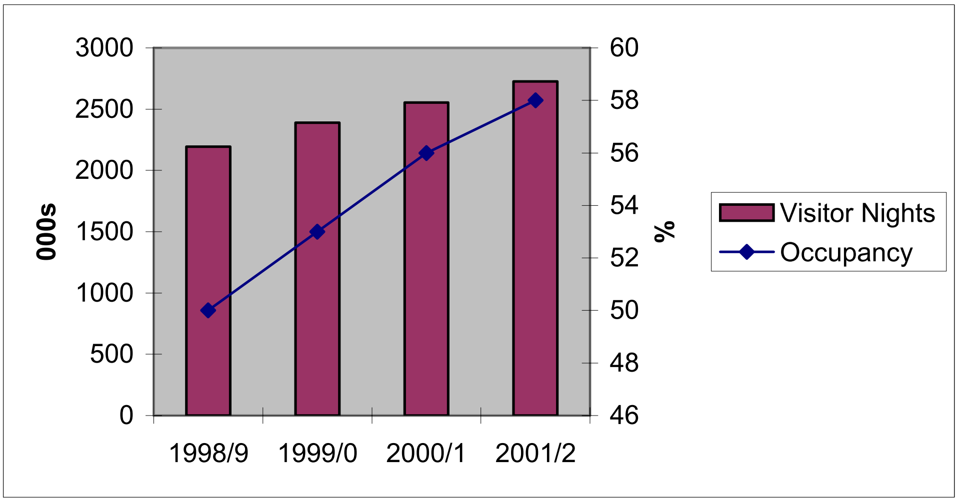


Source: Commercial Accommodation Monitor; Statistics NZ.

- During the period 1998 to 2002 the number of hosted accommodation properties within the Christchurch CAM survey has increased from 19 to 27 properties.
- Annual visitor nights have remained relatively stable in Christchurch over the last four years for hosted accommodation ranging from 71,000 (1998/99 and 2001/02) to a high of 77,000 in 1998/99. At the same time the annual average occupancy has increased from 43 per cent to 48 per cent.
- Visitor nights for the busiest month in each year (February 1999, 2000, 2001and March 2002) have increased from 9,000 visitor nights to 10,000 (+11%). For the worst month (July1998, 1999, 2000 and June 2002) in each year visitor nights have remained stable at 4,000.
- The share of visitor nights across all months has remained relatively constant with three per cent for the worst months and ten per cent for the busiest months. The largest percentage change during the period was for 2000/01 and 2001/02 with three per cent for the lowest and ten per cent for the highest month.
- The difference in visitor nights for the worst and best month over the four year period has remained relatively consistent at between 6,000 and 7,000.

4.4.4 All Accommodation

Figure 6
Christchurch Accommodation Performance – All Properties 1998 to 2002



Source: Commercial Accommodation Monitor; Statistics NZ.

- During the period 1998 to 2002 the number of accommodation properties within the Christchurch CAM survey has increased from 171 to 187 properties.
- Annual visitor nights increased in Christchurch over the last four years for all accommodation sectors from 2,195,000 (1998/99) to 2,727,000 (2001/02), an increase of 24 per cent. At the same time the annual average occupancy increased from 50 per cent to 58 per cent.
- Visitor nights for the busiest month (January 1999, February 2000, March 2001 and 2002) in each year have increased from 240,000 visitor nights to 324,000 (+35%). For the worst month in each year (August1998, June 2000, 2000 and June 2002) visitor nights have increased from 138,000 to 156,000 (+13%).

4.5 Conventions (Christchurch)

Table 39
Economic Impact – International/Domestic Delegates 2001

	Association $	Corporate $	Total $
Economic Impact International Delegates – 2001 (Direct Expenditure	7,840,024	8,620,956	16,460,980
Economic Impact Domestic Delegates – 2001 (Direct Expenditure)	10,164,900	4,320,000	14,484,900

Source: Ernst & Young Survey for Conventions New Zealand.

Table 40
Economic Impact of Christchurch Conventions on Specific Sectors – 2001 (Direct Expenditure)

Location	International $	Domestic $	Total $
Accommodation (40%)	6,584,392	5,793,960	12,378,352
Shopping (19%)	3,127,586	2,752,131	5,879,717
Restaurants (16%)	2,633,757	2,317,584	4,951,341
Entertainment (10%)	1,646,098	1,448,490	3,094,588
Convention expenses (10%)	1,646,098	1,448,490	3,094,588
Other expenses (5%)	823,049	724,245	1,547,294
Total	**16,460,980**	**14,484,900**	**30,945,880**

Assumptions: Proportions of expenditure based on research carried out by the International Congress and Convention Association.

Chapter 5
Visitor Forecasts/Projections

5.1 International

The visitor forecasts prepared by Market Economics Ltd for the Tourism Research Council and used in this section are based on the IVA data rather than IVS which was used in Section 3.1. Using the IVA data and applying them at the regional level indicates that visitor arrivals are higher than previously reported by the IVS for Christchurch and Canterbury[2]. For the forecasts through to 2008 the Market Economics data is used for the base year (2001). The Market Economics data are not available for years prior to 2001.

Table 41
How Many International Visitors Will Canterbury Receive?

Market	Actual	Forecasts
	Year Ending December 2001 (000s)	Year Ending December 2008 (000s)
Visitor Numbers	1,002	1,559
Visitor Nights	5,504	8,484

Note: Figures may not total due to rounding.
Source: Based on International Visitor Forecasts (Tourism Research Council NZ).

- Visitor numbers are forecasted to increase by 56 per cent from 2001 to 2008.
- Visitor nights are forecasted to increase by 54 per cent from 2001 to 2008 indicating that the length of stay will reduce slightly.

2 Assuming that visitors under 15 years of age comprise 8% of all international visitors, there is a difference of approximately 200,000 visitors for the year ending December 2001 between the IVS data and the Market Economics Assessment.

Table 42
Who Will Visit Christchurch?

Market	Actual Visitors Year Ending December 2001		Forecasts Visitors Year Ending December 2008	
	000s	%	000s	%
Australia	209	22	272	18
UK/Nordic	154	16	261	17
Japan	150	16	228	15
Americas	134	14	178	12
Other Asia	160	17	353	24
Other Europe	98	10	121	8
Rest of World	59	6	85	6
Total	**962**	**100**	**1,497**	**100**

Note: Figures may not total due to rounding.
Source: Based on International Visitor Forecasts (Tourism Research Council NZ) Christchurch receives approximately 96% of all visitors to Canterbury.

- Visitor numbers are forecasted to increase by 56 per cent (535,000) from 2001 to 2008.
- The dominance of the Australian market will decline slightly, while the UK/Nordic market increases and the Asian markets are forecasted to increase considerably (121%).

Table 43
Why Will Visitors Come to Christchurch in 2008?

Market Year Ending 2008	Visitor Forecasts									
	Holiday/Leisure		VFR		Business		Other		Total	
	000s	%	000s	%	000s	%	000s	%	000s	%
Australia	212	68	36	17	33	11	15	4	272	100
UK/Nordic	191	73	86	33	8	3	5	2	261	100
Japan	205	90	9	4	9	4	2	1	228	100
Americas	146	82	14	8	7	4	11	6	178	100
Other Asia	290	82	32	9	18	5	14	4	353	100
Other Europe	97	80	11	9	9	7	5	4	121	100
Rest of world	37	43	11	13	11	13	26	30	85	100
Total	**1,178**	**76**	**199**	**12**	**95**	**6**	**78**	**5**	**1498**	**100**

Note: Figures may not total due to rounding.
Source: Based on International Visitor Forecasts (Tourism Research Council NZ).

- The holiday/leisure market is forecasted to contribute 76 per cent of all international visitors to Christchurch.

Table 44
How Many Visitor Nights in Christchurch will be Generated by Each Market?

Market	Actual		Forecasts	
	Visitor Nights Year Ending December 2001		Visitor Nights Year Ending December 2008	
	000s	%	000s	%
UK/Nordic	1,004	19	1,712	21
Australia	1,004	19	1,305	16
Americas	687	13	897	11
Japan	581	11	897	11
Other Asia	793	15	1,794	22
Other Europe	634	12	815	10
Rest of world	476	9	734	9
Total	**5,179**	**98**	**8,154**	**100**

Note: Figures may not total due to rounding.
Source: Based on International Visitor Forecasts (Tourism Research Council NZ). Assume as with visitor numbers Christchurch receives 96% of all visitor nights.

- Visitor Nights are forecasted to increase by 54 per cent (2,870,000) from 2001 to 2008.
- The dominance of the Australian market will decline slightly, while the UK market increases and Other Asia is forecasted to be the largest market for Christchurch.

Table 45
What Type of Accommodation Will Visitors Stay in?

	Actual	Forecasts
Accommodation Type	**Year Ending December 2001 Nights 000s (%)**	**Year Ending December 2008 Nights 000s (%)**
Private Home/Friends	1,268 (24)	1,957 (24)
Hotel	1,268 (24)	1,957 (24)
Student Accommodation	793 (15)	1,223 (15)
Backpackers/Hostel	634 (12)	978 (12)
Motel	528 (10)	815 (10)
Rented Accommodation	370 (7)	571 (7)
Farmstay/Homestay	159 (3)	245 (3)
Caravan/Campervan	105 (2)	163 (2)
Tent Site	53 (1)	82 (1)
Cabin/Tourist Flat	53 (1)	82 (1)
Luxury Lodge	11 (.2)	16 (.2)
Other	53 (1)	82 (1)
Total Accommodation Nights	**5,284 (100)**	**8,154 (100)**

Note: Figures may not total due to rounding.
Source: Based on International Visitor Forecasts (Tourism Research Council NZ). Assumes percentage for each accommodation type remains the same as 2001.

- Staying with friends and in hotels are the main accommodation types with 24 per cent each.
- Student accommodation (15%), Backpackers (12%) and motels (10%) are the other major accommodation providers.

Figure 7
When Will International Visitors Come to Christchurch?

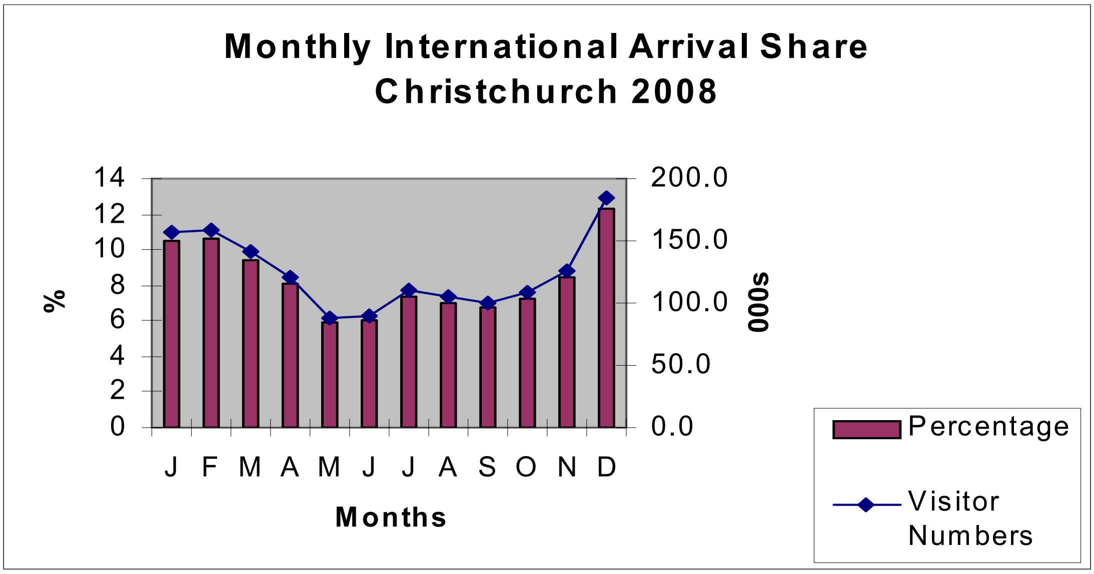


Table 46
Estimated Average Number of Visitors 2008

	Months – Year 2008											
	Jan	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Per Month[1] (000s)	157.2	158.7	140.7	121.3	88.3	89.8	110.8	104.8	100.3	109.3	125.7	184.1
Per Day[2] (000s)	25.4	28.3	22.7	20.2	14.2	15.0	17.9	16.9	16.7	17.6	21.0	29.7

Note: 1. Per month forecasts based on 2001 percentages for each month.
2. Forecasts based on 2008 monthly projections and assumes average stay of 5 nights (same as 2001).

- By 2008 in comparison with 2001 the actual difference in visitor numbers between the best and worst months will have increased from 61,500 (2001) to 95,800 (2008).
- The per day average visitor numbers to Christchurch for 2008 in comparison with 2001 increases by 5,000 for the worst month (May) and by 10,600 for the best month (December).
- The average daily visitor numbers for December is the equivalent of increasing the current 'Usually Resident Population" for Christchurch (316,227 – Census 2001) by nine per cent.

5.2 Domestic

Table 47
Where Will Canterbury's Domestic Visitors Come from?

Origin	Trips (000s)		
	2000	2001	2008
Northland	*1	Not Available	Not Available
Auckland	193		
Waikato	*26		
Bay of Plenty	*9		
Gisborne	*3		
Hawkes Bay	*6		
Taranaki	*7		
Man/Wang	*30		
Wellington	116		
North Island Total	**394**		
Marlborough	71		
Nelson/Tasman	62		
Canterbury	884		
West Coast	58		
Otago	278		
Southland	89		
South Island Total	**1,442**		
Total	**1,836**	**2,332**	**2,729**

Notes: *Subject to sampling variability in excess of 50 per cent. Columns may not add to totals due to rounding.
Source: Based on Tourism Research Council's Forecasts for Domestic Tourism and assumes the same percentages of visitation from each region as 2000.

- An increase in domestic visitors of 15 per cent is forecasted by 2008.
- 79 per cent of all trips will be from the South Island.
- Auckland and Wellington will account for nearly 70 per cent of trips from the North Island.

Table 48
Why Will People Visit Canterbury?

Main Reason	**Trips 000s (%)**		**Visitor Nights 000s (%)**	
	2008	**%**	**2008**	**%**
Holiday/Leisure	1,263	46	3,885	47
VFR	822	30	2,856	35
Business	424	16	962	12
Other	220	8	560	7
Total	**2,729**	**100**	**8,263**	**100**

Notes: Figures may not total due to rounding.
Source: Based on Tourism Research Council's Forecasts for Domestic Tourism.

- The largest increase in trips and visitor nights will be in the holiday/leisure and VFR categories, which form between 76 per cent (trips) and 82 per cent (visitor nights) of the total trips and visitor nights.

Table 49
Where Will Domestic Visitors Stay in Canterbury?

Accommodation Type	**Visitor Nights 2001 (000s)**	**(%)**	**Visitor Nights 2008 (000s)**	**(%)**
Private home of friend/ relative	**3,587**	**51**	**4,214**	**51**
Licensed Hotel/Motel	**774**	**11**	**909**	**11**
- motel with restaurant	281	4	331	4
- mid-range hotel	352	5	413	5
- top class hotel	211	3	248	3
Camping Ground	**703**	**10**	**826**	**10**
- tent site	352	5	413	5
- cabin	141	2	165	2
- caravan site	281	4	331	4
Unlicensed Motel	**703**	**10**	**826**	**10**
Other	**703**	**10**	**826**	**10**
- backpackers	141	2	165	2
- rented	211	3	248	3
- other	352	5	413	5
Holiday home/bach	**563**	**8**	**661**	**8**
Total	**7,034**	**100**	**8,263**	**100**

Note: Figures may not total due to rounding.
Source: Based on Tourism Research Council's Forecasts for Domestic Tourism and assumes the same percentages of visitor nights for each category as 2000.

- Visitor nights will increase 1,229,000 by 2008 with 51 per cent attributed to Private Homes/Friends and Relatives.

5.3 Day Visitors

Because over 90 per cent of all day trips to Canterbury are from Canterbury and it is anticipated that this is unlikely to change significantly, forecasts have not been included.

Chapter 6
Impact Of Visitor Growth

While the domestic market will continue to be a major player in the tourism industry for Christchurch and Canterbury, it is the international visitor growth which will have the greatest impact. International visitor numbers to Christchurch are forecasted to increase by 56 per cent from 2001 to 2008. What will be the impact of this growth on both Christchurch City and other Canterbury tourism destinations? The table below provides an indication of the impacts.

Table 50
Indication of Growth Impact on Christchurch and Canterbury Tourism Destinations

Visitor Growth Factors	Christchurch	Canterbury
General	▪ Tourism will be a major driver of economic growth in the region with a forecasted 56% increase in international visitors and 17% domestically. ▪ It will be essential to develop strategic tourism plans at the local, town/city and regional levels if tourism is to be developed and managed effectively for all communities. ▪ Local authorities will need to accept a leadership role in tourism planning. ▪ Communities will need to be consulted as part of the planning process.	
Accommodation	▪ Growth in international visitor nights by 2008 requiring more accommodation include hotels (689,000 visitor nights), student accommodation (430,000), backpacker (344,000), motels (287,000) ▪ Growth in the domestic market will be for 381,000 visitor nights requiring commercial accommodation ▪ Increased requirement for more accommodation due to an additional 2,870,000 visitor nights by 2008 for the international market. ▪ The impact is likely to be a requirement for more central city hotels necessitating either conversion of existing buildings or vacant land	▪ Key resort areas of Hanmer, Akaroa, Lake Tekapo, Kaikoura are likely to require increased accommodation to meet the demand of additional visitors to Canterbury
Attractions	▪ An additional 535,000 international visitors by 2008 (average of 1,465 per day) will create opportunities for more visitor attractions and tours ▪ Some popular existing attractions (Canterbury Museum, New Art Gallery, International Antarctic Centre, Arts Centre) may experience increasing congestion at peak times.	▪ Popular attractions in small resort areas may experience increasing congestion at peak times ▪ Opportunities for new attractions include promotion to increasing domestic visitors.

Activities	▪ Increased opportunities for niche businesses focusing on specific market sectors (e.g., heritage, arts/crafts, adventure, nature tourism) ▪ Increased opportunities for itineraries focusing on specific market sectors (e.g., heritage, arts/crafts, adventure, nature tourism)	▪ Increased opportunities for niche businesses focusing on specific market sectors (e.g., heritage, arts/crafts, adventure, nature tourism) ▪ Increased opportunities for itineraries focusing on specific market sectors (e.g., heritage, arts/crafts, adventure, nature tourism) ▪ Potential to develop activities that are specific to smaller communities based on their competitive advantages (wine, hot pools, etc).
Transport	▪ Increased demand for public transport as the Free and Independent Traveller (FIT) market increases in size ▪ Increased flights to Christchurch to accommodate visitor growth ▪ Increased demand for rental cars and campervans based on the FIT market growth ▪ Demand for secure campervan parking spaces in the city ▪ Increased demand for tourist bus parking space in central city (e.g., Worcester Boulevard, Canterbury Museum)	▪ Increased services to key tourism areas as visitor numbers increase and operators meet demand ▪ Parking for rental cars and campervans as FIT visitors increase (e.g., Hanmer Springs, Akaroa, Kaikoura)
Amenities/ Infrastructure	▪ More toilets and parking to meet increased requirements ▪ Improved directional signage to key attractions and information sources ▪ Increased 'wear and tear' on public amenities (e.g., public areas, parks and gardens) leading to increased maintenance and therefore costs	▪ Increased demand for services well in excess of local resident requirements leading to issues of allocation of costs for local authorities (Kaikoura, Hanmer Springs, Akaroa) ▪ Increased demand for potable water, sewage systems
Seasonality	▪ 60% of all international visitors arrive between November and April, same period as peak domestic visitors ▪ Development of new accommodation, attractions, activities and other services to meet peak demand will still leave under performing facilities for the other six months	▪ Because there is less business tourism for rural resorts both domestically and internationally, seasonality will be an increasing problem as the gap between the peaks and troughs increases
Economic Implications	▪ Christchurch will continue to benefit economically from tourism growth, mainly in the accommodation, retail, restaurants and services sectors	▪ There will be increased economic benefits for operators in specific tourism locations (Kaikoura, Hanmer Springs, Akaroa) ▪ Other areas will need to identify how they can benefit from the visitor growth forecasted
Social Implications	▪ Increased crowding/congestion at specific popular attractions over a longer period of the year ▪ Potential diminished visitor experience at specific popular attractions ▪ Some residents may have negative views of tourism growth including racially motivated opinions	▪ Potential increase in permanent residents having negative views of tourism growth – overcrowding, increased rates to meet additional amenity and infrastructure costs

Environmental Implications	▪ Increased traffic and potentially pollution	▪ Increased pressure on the natural environment from visitor use (e.g., greater use of walking tracks)

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