Part A: Cruise ship visitor experiences and expenditure, and business stakeholder perceptions
Research objectives

1. Examine perceptions, experiences and spending patterns of cruise ship visitors in Akaroa
2. Examine hosting experiences of selected business stakeholders in Akaroa and Christchurch (re: cruise ship visitor market)

<table>
<thead>
<tr>
<th>Year/Season</th>
<th>Cruise Ships</th>
<th>Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008/09</td>
<td>9</td>
<td>4,882</td>
</tr>
<tr>
<td>2009/10</td>
<td>8</td>
<td>8,754</td>
</tr>
<tr>
<td>2010/11</td>
<td>16</td>
<td>21,067</td>
</tr>
<tr>
<td>2011/12</td>
<td>86</td>
<td>125,667</td>
</tr>
<tr>
<td>2012/13</td>
<td>86</td>
<td>143,925 (forecasted)</td>
</tr>
</tbody>
</table>
## Visitor survey

### 433 cruise ship passengers surveyed
- 289 in Akaroa (at the wharf)
- 144 in Christchurch (prior to boarding their tour bus)

### 21 ‘survey days’
- 25 November 2012 to 17 February 2013
- Designed to coincide with a range of cruise ship arrivals

<table>
<thead>
<tr>
<th>Sample characteristics (overall)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Nationality</strong></td>
</tr>
<tr>
<td>Australia (70%)</td>
</tr>
<tr>
<td>USA (16%)</td>
</tr>
<tr>
<td>UK (5%)</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
</tr>
<tr>
<td>Female (57%)</td>
</tr>
<tr>
<td>Male (43%)</td>
</tr>
<tr>
<td><strong>Age</strong></td>
</tr>
<tr>
<td>Over 60 years (60%)</td>
</tr>
<tr>
<td><strong>Experience</strong></td>
</tr>
<tr>
<td>At least one previous cruise (69%)</td>
</tr>
<tr>
<td><strong>Travel party</strong></td>
</tr>
<tr>
<td>Travel with spouse or partner (52%)</td>
</tr>
<tr>
<td><strong>Cruise line</strong></td>
</tr>
<tr>
<td>Princess Cruises (63%)</td>
</tr>
</tbody>
</table>
Visitor activities

Activities undertaken in Akaroa ‘township’ (n=211):

1. Walking around Akaroa (88%)
2. Eating and drinking (59%)
3. Shopping (57%)
4. General sightseeing (27%)
5. Guided tours/activities (20%)

Activities undertaken in Akaroa ‘district’ (n=35):

1. Farm visit (51%)
2. Scenic view (51%)
3. Barry’s Bay Cheese factory (14%)
Visitor spending

- Average ‘port visit’ spend per respondent = $129.26 (n=430)
- Those who **leave** Akaroa = $141.55 (n=209)
- Those who **stay** in Akaroa = $117.90 (n=208)
- 7.3% of Akaroa respondents spent ‘**nothing**’ in Akaroa (n=15)
Visitor spending

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- Those who leave Akaroa = $141.55 (n=209)
- Those who stay in Akaroa = $117.90 (n=208)
- 7.3% of Akaroa respondents spent ‘nothing’ in Akaroa (n=15)

Spending in Akaroa per respondent (category)

<table>
<thead>
<tr>
<th>Spending category</th>
<th>Average spend per respondent ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping and souvenirs</td>
<td>$54.74</td>
</tr>
<tr>
<td>Tours</td>
<td>$31.78</td>
</tr>
<tr>
<td>Restaurant meals</td>
<td>$13.90</td>
</tr>
<tr>
<td>Other food and refreshments</td>
<td>$12.20</td>
</tr>
<tr>
<td>Transport</td>
<td>$2.37</td>
</tr>
</tbody>
</table>
**Enjoyed most**

- Scenery (42%)
- A pretty town (34%)
- Relaxed village atmosphere (20%)
- Friendly people (16%)
- Good weather (15%)
- Attractions and activities (15%)
- Shopping/restaurants/cafes (11%)

**Enjoyed least**

- Bad weather (10%)
- Too crowded (3%)
- Expensive (2%)
- (74% said “nothing”)

“What did you enjoy most and least about your visit to Akaroa?”

(n=211)
Akaroa port visit

Are you satisfied with your Akaroa port visit? (n=413)
- Satisfied (92.7%)
- Neutral (6.0%)
- Dissatisfied (1.2%)

Are you likely to visit Akaroa in the future? (n=418)
- Likely (67.0%)
- Not sure (8.4%)
- Unlikely (24.6%)

Would you recommend the region to others? (n=414)
- Likely (97.3%)
- Not sure (1.7%)
- Unlikely (1.0%)
21 business stakeholders interviewed

- 14 in Akaroa; 7 in Christchurch
- April-May 2013

A range of business types

- Catered primarily to ‘independent’ cruise passengers
- Reflect visitor spending categories

Focus on perceptions, opinions and experiences (not on ‘financials’)
Business experiences

Visitor experience

Cruise ships in context

Economic benefits

Business challenges

Hosting experience
Part B:
Community attitudes to hosting cruise ship arrivals in Akaroa
Background & Objectives

- Letters to *The Akaroa Mail*
  - 3 against; 17 in support; 3 from cruise ship visitors

- Survey to assess attitudes of the Akaroa community
  - Contact with cruise ship visitors
  - Perceived benefits
  - Issues and problems
Total sample (316 respondents)

- 56.6% response rate
- 76.5% aged 55 years or over
- 60.3% female
- 98.0% Pakeha/European
- 65.0% working
- 61% (n=192) permanent or full time residents
- 31% (n=99) non-resident property owners
- 97 holiday home owners
- Spent average of **38 nights** in Akaroa during the cruise ship season
<table>
<thead>
<tr>
<th>Category</th>
<th>Resident</th>
<th>Postal</th>
<th>District</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>More than ½ aged 55-74 yrs</td>
<td>Almost ¾ aged 55-74 yrs</td>
<td>Almost ½ aged 55-64 yrs</td>
</tr>
<tr>
<td>Average years in Akaroa</td>
<td>19.1 yrs</td>
<td>18.8 yrs property</td>
<td>17.0 yrs in area</td>
</tr>
<tr>
<td>Years ≥ 10 years</td>
<td>62.4% ≥ 10 years</td>
<td>76.2% ≥ 10 years</td>
<td>73.9% ≥ 10 years</td>
</tr>
<tr>
<td>Employment</td>
<td>88 (48.6%) worked in tourism-related jobs</td>
<td>31 (62.0%) worked in tourism-related jobs</td>
<td></td>
</tr>
<tr>
<td>Occupation</td>
<td>Accommodation 28.8%, Hospitality 24.3%, Attractions 20.7%</td>
<td>Tourism retail 26.8%, Other retail 19.5%, Accommodation 19.5%</td>
<td></td>
</tr>
<tr>
<td>Cruise Ship Contact</td>
<td>44.9% - ‘frequent’ contact with cruise ship visitors</td>
<td>45.2% - ‘sometimes’ contact with cruise ship visitors</td>
<td>44.9% - ‘frequent’ contact with cruise ship visitors</td>
</tr>
</tbody>
</table>
Impact on quality of life

<table>
<thead>
<tr>
<th></th>
<th>Improves</th>
<th>No impact</th>
<th>Reduces</th>
<th>No contact or N/A,</th>
</tr>
</thead>
<tbody>
<tr>
<td>Significant improves, n=36; 11%</td>
<td>46.9%</td>
<td>17.5%</td>
<td>5.7%</td>
<td>18%</td>
</tr>
<tr>
<td>Improves, n=55; 18%</td>
<td>29.9%</td>
<td>55.4%</td>
<td>6.0%</td>
<td>18.1%</td>
</tr>
<tr>
<td>No impact, n=149; 48%</td>
<td>40.0%</td>
<td>40.0%</td>
<td>18.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

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Attitudes towards cruise ship tourism

- 24 statements about cruise ship tourism
  - 1=disagree; 5=agree
  - Higher agreement for positive statements

Overall attitude scores

- Negative, n=79; 25%
- Positive, n=73; 23%
- Neutral, n=161; 52%

Additional data:
- Jobs m=4.02
- Benefits m=4.06
- Planning m=4.13
- Traffic m=3.65
- Economy m=4.38
Attitude by sample group

Respondents (%)

- Positive attitude
- Neutral
- Negative attitude

New Zealand’s specialist land-based university
Does the Akaroa community benefit from cruise ship tourism?

Benefits greatly, n=143; 47%
Benefits moderately, n=86; 28%
Benefits slightly, n=41; 14%
No benefits, n=20; 7%
Don't know, n=11; 4%

Total sample | 89.0%
Resident | 91.4%
Postal | 90.0%
District | 82.7%
What are the three main benefits?

- 265 respondents (84.4% total sample) identified 730 benefits (many repeated)

<table>
<thead>
<tr>
<th>Economic (253 times; 35%)</th>
<th>Tourism (201 times; 28%)</th>
<th>Community &amp; Social (157 times; 22%)</th>
<th>Employment (119 times; 16%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Boost to numbers</td>
<td>Mood of the town</td>
<td>Number of jobs</td>
</tr>
<tr>
<td>Akaroa-specific</td>
<td>Appeal of Akaroa</td>
<td>Facilities and amenities</td>
<td>Jobs for young people</td>
</tr>
<tr>
<td>Types of business</td>
<td>Akaroa’s profile</td>
<td>Engaging with visitors</td>
<td>Jobs for locals</td>
</tr>
<tr>
<td>Viability</td>
<td>Future visitors</td>
<td></td>
<td>Types of jobs</td>
</tr>
<tr>
<td>Opportunity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issue</td>
<td>Severe or Very Severe Problem</td>
<td>Slight or Moderate Problem</td>
<td>No Problem</td>
</tr>
<tr>
<td>--------------------------------------------------------------</td>
<td>------------------------------</td>
<td>---------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Strain on facilities and infrastructure</td>
<td>36.8</td>
<td>36.3</td>
<td>50</td>
</tr>
<tr>
<td>Crowding in public buildings</td>
<td>15.8</td>
<td>47.9</td>
<td>39.7</td>
</tr>
<tr>
<td>Crowding on footpaths</td>
<td>17.8</td>
<td>48.7</td>
<td>36.3</td>
</tr>
<tr>
<td>Traffic congestion</td>
<td>16.6</td>
<td>52.2</td>
<td>33.5</td>
</tr>
<tr>
<td>Crowding in cafés and restaurants</td>
<td>16.3</td>
<td>64.2</td>
<td>19.5</td>
</tr>
<tr>
<td>Crowding in retail stores</td>
<td>23.1</td>
<td>60.5</td>
<td>16.4</td>
</tr>
<tr>
<td>Increased noise</td>
<td>52</td>
<td>36.7</td>
<td>11.3</td>
</tr>
<tr>
<td>Increased litter</td>
<td>39.7</td>
<td>49.5</td>
<td>10.8</td>
</tr>
</tbody>
</table>
Three most problematic cruise ship issues

Issue/problem

• 209 respondents (66% total sample) identified 486 issues (many repeated)

Solution

• Many generic, some specific

Responsibility

• CCC & others
Issues (main categories)

- Environmental, n=43; 9%
- Visitor management, n=66; 14%
- Bus-related, n=119; 24%
- Facilities & amenities, n=137; 28%
- Overcrowding & congestion, n=121; 25%
## Issues (5 categories)

<table>
<thead>
<tr>
<th>Facilities &amp; amenities (137 times; 28%)</th>
<th>Overcrowding &amp; congestion (121 times; 25%)</th>
<th>Bus-related (119 times; 24%)</th>
<th>Visitor management (66 times; 14%)</th>
<th>Environmental (43 times; 9%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toilets/public buildings</td>
<td>Akaroa overall e.g., footpaths</td>
<td>Traffic (SH75) &amp; in Akaroa</td>
<td>Visitor behaviour</td>
<td>Impacts on the harbour</td>
</tr>
<tr>
<td>Other township issues e.g., litter, appearance, hospital closure</td>
<td>Specific locations within Akaroa e.g., library wifi</td>
<td>Parking congestion &amp; fumes from parked buses</td>
<td>Visitor safety e.g., hospital closure, shelter at wharf</td>
<td>Social impacts e.g., loss of unique, quiet atmosphere</td>
</tr>
<tr>
<td>Wharf issues e.g., surface, berthing space</td>
<td></td>
<td>Quality of visitor experience</td>
<td></td>
<td>Impact on community cohesion</td>
</tr>
</tbody>
</table>

- Many of the issues reported concerned the **visitor experience**
Generic solutions

Limiting cruise ship numbers (80 times)

Overcrowding & congestion

Facility & amenity issues

Environmental issues
Specific solutions

**Problem**

- Bus-parking issues
- Closed public facilities
- Overcrowding & congestion

**Solution**

- Relocation of waiting staging area
- Direct allocation of cruise ship levies
- Community adaptation
Responsibility

- ECan Harbour Master
- Police
- Shipping companies
  Tour operators
- Community Board
- CCT ADP

CCC
Concerned enough to take action

- 32 respondents (11.4%) had done something about it
  - 20 Resident (12.6% of sample); 12 District (24.5% of sample)
Additional comments

- 53.5% (n=169) of all respondents
  - 62.0% District
  - 55.8% Resident
  - 43.5% Postal
- Broader overview
- Coded into 5 themes

- A ‘tourist town’
- Enjoy the tourists
- Adapt or ‘get over it’
- Balancing costs & benefits
- A divided community
Overall findings

• A very engaged community
  – Some concerns over impact on the community
• Overall positive attitude
• Welcome tourism & cruise ship tourism
• Widespread recognition of benefits
• Some tangible issues & problems identified
  – Many can be fixed/addressed
  – Issues in respect of transparency & uncertainty
Questions?

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